

Getting into the Balcony: A Ladder and Toolbox

Formative Congregational Assessments

Lancaster Mennonite Conference

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Preface

God calls us together in communities of believers and sends us to be his ambassadors of reconciliation—pointing to Jesus. In these communities of believers God is honored and allegiance declared, the Scripture read and taught, the Holy Spirit leads, people are nurtured and transformed, and the community joins with God’s purpose and mission. Lancaster Mennonite Conference sees congregations as the primary centers for joining with God. The Conference seeks to support each congregation on their faith journey of being called and sent into a changing world.

So, it is not surprising that a Congregational Assessment Work Team consisting of pastors, bishops, lay leaders, and staff was given the mandate:

To empower congregations to carry out regular assessments of overall ministry and congregational health in ways that stimulate discernment about what God is calling and sending them to be and to do.

After many conversations (with congregational leaders and forum groups) and dreaming together, the work team zeroed in on the development of this resource “Getting into the Balcony: A Ladder and Toolbox for Formative Congregational Assessments” as a foundational starting place. The aim of this work is to begin creating a culture within the congregations of Lancaster Mennonite Conference – a culture where formative assessments are valued, supported, and expected as a natural part of congregational life and leadership. We hope this resource will empower and encourage pastors and congregational leaders to plan for and lead such processes.

“Getting into the Balcony: A Ladder and Toolbox for Formative Congregational Assessments” will assist leaders and the congregation to climb the rungs of a ladder and get into the “balcony” of their congregation. From this vantage point, they can reflect on the identity, purpose, and future of the congregation, as well as how they function as a community. When done with intentional prayer, dwelling in scripture, discernment, and reflection, formative assessments become “holy conversations” as the congregation seeks to listen to God and respond in obedience.

Throughout the development of this resource, the work team grappled with vocabulary. The vocabulary for “church” resources differs according to the conceptual frameworks of church growth, church health, and missional church. The work team agreed that assessment has a more positive connotation than evaluation. So we added the adjective “formative” as a descriptor (formative is defined as having the ability or power to form for growth or development). **Our understanding of formative assessments is: an assessment process that forms the congregation for God’s full Kingdom purposes.**

The information presented and formative congregational assessment processes described in this resource are by no means exhaustive. Rather, they represent a variety of tools

gathered through reading a variety of writers and a review of resources. Several of these resources have also been used to varying degrees by some Lancaster and Atlantic Coast Mennonite Conference congregations.

When using any of the assessment tools, the work team feels it is important for congregations to remember that:

- No single tool can serve every congregation, but should be adapted to fit specific congregational needs.
- No single tool can help a congregation examine every aspect of congregational life.

Our expectation is that the information in this resource will assist congregations and leaders in choosing and adapting an assessment tool to address their context. Plans are for this toolbox to be periodically updated and leaders will be notified when new processes are added.

Special thanks to the Congregational Assessment Work Team members: Leslie Homer-Cattell, Carl Horning, Donald Nauman, Carol Oberholtzer, Randall Shull, John Smucker, and J. Samuel Thomas. The following Lancaster Mennonite Conference and Eastern Mennonite Missions staff members also assisted in this work: Karl Landis, Alonna Gautsche Sprunger, and Antonio Ulloa.

We pray that congregations will journey toward God's vision of full Kingdom potential with missional effectiveness, innovation, and vitality so that both our life together and witness in word and deed are signs of God's reign.

“LORD, may Your Kingdom Come. AMEN.”

Introduction

Getting into the Balcony: A Ladder and Toolbox for Formative Congregational Assessments will first present the call and rationale for regular formative assessments of congregational life and ministry. Section two will look at both the urgency and the resistance to formative assessments. The characteristics and practices of good formative assessment processes are described in section three. Finally, the last section provides a description of some of the formative assessment processes along with several stories from congregations that have utilized a specific tool.

The Congregational Assessment Work Team believes it is important to state from the beginning there are some biases that come through in this writing. Some statements regarding the nature of the church have entire books written about them. These statements, although “theological and ecclesiological” are not for the purpose of academic study nor are they stated in the “politically correct churchly” fashion. They serve as a reference and signal that we cannot be lax in articulating God’s purpose for the church. Because the world and society are changing in so many ways, “doing church” as we have always done (or doing the same thing only better), is not enough. Thus, we are at a pivotal point in time when we need to carefully unpack our congregations’ understanding of purpose, life, and ministry and ask how they align—with God’s purposes in redeeming and reconciling our changing world to Himself.

The congregation exists for God’s mission.

1. The congregation is a community of followers of Christ called and empowered by the Holy Spirit, being transformed and sent to join God in His mission. They are a sign of God’s reign and this is an act of worship that is pleasing to God.
2. The missional church emphasis helps us reclaim a scriptural understanding of the church for God’s mission and apply it in the changing context of the 21st century. The language and descriptions of missional church help us recognize ways in which the church has been seconded to influences of Christendom and Modernity, some of which have undermined the church’s witnesses to the world or are no longer helpful as society and culture are changing. (See Appendix A – “Toward A Common Understanding of the Missional Church”).
3. This central focus on God’s mission will require congregations to look upward, inward, and outward – all at the same time. These are not sequential; rather, there is a flow back and forth that informs and spurs on the other (love God, love neighbor as you love self).
 - a. Looking upward and inward creates an environment in which everyone (disciples, seekers and the congregation as a whole) is developing a deepening intimacy with God, being shaped by God’s heart, and conforming to God’s will.

- b. Looking outward means going and being in relationship with the neighbor; being Christ's incarnational presence through the empowerment of the Holy Spirit, and extending Christ's peace and hope that heals human hurts and spiritual longings.
4. The congregation exists for God's mission. Congregations have unique callings and gifts to minister with each other **and** their neighbors. Neighbors exist in local, regional, and global contexts. A congregation cannot ignore local neighbors among whom it lives and by responding to the local neighbor, we listen more intently to the regional and global neighbors.
5. God uses willing, surrendered, and obedient disciples and congregations. This is not the same as the world's definition of successful or excellence, and has nothing to do with size. Rather, thriving congregations are thriving in listening and responding to the call that God has placed with them while and releasing the results to God (see Appendix AB for Habits of Thriving Anabaptist Missional Congregations).

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Gaining Perspective

section 1

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Why Formative Congregational Assessments?

Regular formative assessments provide a vital opportunity for congregations to step back from “ministry as usual.” Ron Heifetz and Marty Linsky have written extensively about the necessity for leaders to *Get on the Balcony* so they can gain perspective (*Leadership on the Line: Staying Alive through the Dangers of Leading*, Ronald A. Heifetz and Mary Linsky, Harvard Business School Publishing, 2002 chapter 3). The Jesuits call this skill “contemplation in action” – the act of stepping back in the midst of action and asking, “What’s really going on here?” Leaders and congregations need structured ways to gain a larger perspective. Formative assessments provide congregations an opportunity to gain that larger perspective and to reflect and talk about their obedience to God and effectiveness in mission.

According to Alban Institute consultant and author, Roy Oswald, the purposes of congregational assessments are threefold (Oswald, Roy, *Getting a Fix on your Ministry*, Alban Institute, Herndon, VA, 2001):

1. To converse, reflect, and learn about how we are fulfilling our commitments to Christ, the church, and one another.
2. To discern our calling (and sending) the vision for the future that God intends for a particular body of believers.
3. To plan and faithfully utilize resources to pursue God’s purposes.

Patrick Keifert with Church Innovations says that congregations desiring to be in step with God’s purposes in a changing world must develop the habit of asking questions. (Keifert, Patrick, *We are Here Now*, Alellon Publishing, Engle, ID, 2006):

congregations...must develop the habit of asking questions.

Identity questions

Who and whose are we? What do we value?

Contextual questions

Where are we? What time is it? Who is our neighbor?

Purpose questions

What is God doing around us? How is God calling and sending us to join in God’s mission?

Focus questions

How shall we organize? How shall we evaluate?

These questions sound simple and basic yet need to be answered honestly at three different levels:

1. How do the Scriptures and our formal stated beliefs inform the answers to the above questions?
2. How do our attitudes and actual behaviors inform the answers?
3. What habits do we deem important enough to teach and pass on to others? What are we not teaching? How do these inform our answers?

The review of writings also revealed additional reasons for congregational assessments:

- To engage in times of prayerful listening to what God is saying through scripture, prayer, and listening to all members (especially those who are not in the “inner circle” of leaders).
- To uncover differing expectations that members have regarding the congregation. When these differing understandings are identified early, they can be addressed before they grow big, cause problems, and become destructive.
- To gain new insights into how congregations and members are living and working together.
- To (re)explore the rationale for specific ministries, determine whether those needs still exist, and are being effectively met.
- To connect and listen to the human needs and spiritual longings of neighbors.
- To explore and celebrate the gifts and strengths of the congregation along with identifying areas needing prayerful focused attention.
- To gain insight to the culture or climate of the congregation.
- To discern if the congregation is stewarding “time and passions, gifts and resources” into God appointed ministries.
- To establish new or modify congregational direction.

Are Congregational Formative Assessments Biblical?

“Assessment” or “evaluation” may seem like a foreign concept to the church and to the Bible – since neither word appears in the New Testament. Yet, if we translate them into everyday meaning – that is, we are or someone else is checking to see how we are doing – it is clear that this concept is very consistent with a biblical frame of reference.

Evaluation or assessment is natural to the human experience. It is one of God’s ways of bringing the history of the past into dialogue with the hope for the future. Without confession of sin, there is no reconciliation, without the counting of blessings there is no thanksgiving, without the acknowledgment of accomplishments there is no celebration, without awareness of potential there is no hope, without hope there is no desire for growth, and without a desire for growth the past will dwarf the future. We are called into new arenas of faithfulness by taking a realistic and hopeful look at what we have been and what we can still become. Surrounded by God’s grace and the cloud of witnesses we can look at our past unafraid and from its insights eagerly face the future with new possibilities.

This quotation from a pamphlet prepared by the United Methodist Church concisely presents a theological foundation for formative assessments (*Theological and Theoretical Foundations for Evaluating Ministry*, a pamphlet prepared by the Division of Ordained Ministry, Board of Higher Education and Ministry of the United Methodist Church, Nashville, 1990).

Assessment happens in parking lots, over the telephone, or in sincere and earnest conversations. Providing an orderly and caring process by which formative assessment can occur gives integrity to the congregation's desire to be faithful in God's call and mission.

The theme of judgment and grace that appears throughout the Bible assumes that God made an assessment of how well or how poorly individuals, the people of Israel, or various Gentile nations were living out justice, mercy, faithfulness, and righteousness. Jesus frequently warns the Pharisees about missing the mark in their zeal to follow the letter of the law they laid out for themselves. Paul recounts his experience of correcting Peter for his failure to be consistently welcoming in his treatment of Gentile believers in Jesus (Galatians 2).

In these examples, people are assessed or corrected for a shortcoming or wrongdoing. There are also many examples in the Scriptures of assessment leading to blessing and encouragement. In the parable of the talents (Matthew 25), the stern master is very pleased when he assesses the work of two of his servants. They are undoubtedly pleased and relieved to hear him say, "Well done, good and faithful servant! ... Come and share your master's happiness!" For the third servant, however, his work comes up short.

Later in the same chapter, Jesus tells the parable of the sheep and goats who come before the Son of Man's heavenly judgment seat. Both are surprised by his assessment of their lives. The sheep are surprised they are credited with treating him well. The goats are just as surprised they are condemned for treating him poorly.

Much of the last chapter of Romans (16) consists of Paul's mostly positive assessments of the contributions of his co-workers:

- Phoebe "has been a great help to many people, including me,"
- Priscilla and Aquila "risked their lives for me,"
- Mary "worked very hard for you,"
- Apelles has been "tested and approved in Christ."

Assessment is closely related to discernment. Assessment involves collecting information and deciding what it means, whereas discernment focuses on "deciding what it means" (but clearly assumes that we have events or information whose meaning needs to be interpreted or discerned). Matthew 5 and

1 Corinthians 11 warn Christians to examine themselves in worship and before sharing in communion. 1 John 4 warns Christian to "test the spirits to see whether they are from

Assessment is closely related to discernment.

God.” Paul urges the leaders of the Corinthian church to “examine yourselves to see whether you are in the faith” (2 Corinthians 13:5).

These and other scriptures make clear that God expects us to assess or evaluate ourselves periodically rather than waiting for God to do it. We can then make appropriate corrections through the grace and power of the Holy Spirit, so that we “may live a life worthy of the Lord and may please him in every way; bearing fruit in every good work, growing in the knowledge of God, being strengthened with all power according to his glorious might” (Colossians 1).

Formative assessments are not tools to tear down the Body of Christ but tools that communicate truth in love – tools that strengthen and equip us to carry the Gospel into the world.

The Urgency

section 2

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section 2

Why the need and urgency about Formative Congregational Assessments?

Jim Henderson, et al, in his book, *Leading Congregational Change*, says that **urgency** is the driving force or motivation for change.

Urgency is generated by contrasting an accurate perception of reality and God's ideal (Herington, Jim, et al, *Leading Congregational Change*, Jossey-Bass, San Francisco, CA, 2000).

urgency is the driving force or motivation for change.

Formative Congregational Assessments provide an avenue for both accurate perception and creating urgency. Creating urgency does not necessarily portray the church in a negative light. Urgency is created by a strong awareness of the mission field outside the doors of nearly every church. Positive urgency leads to an increased openness to God and a greater willingness to change. Urgency stimulates discomfort. Urgency makes the status quo of a maintenance mindset and complacent behaviors unacceptable.

Our Natural Tendencies to Drift toward Maintenance and Complacency

Over time, congregations naturally drift toward maintenance where resources, ministry, relationships, spiritual gifts, time, and finances become primarily focused inward on those who are already believers. This is often not an intentional drift. Members, however, lose sight of God's missional purposes.

The vast majority of people in the typical congregation often do not perceive a need for transition and change. They are not ready to respond to a new generation of challenges facing them. They seek stability and acceptable predictability, not what appears to be chaos and unpredictability. They may unknowingly become complacent and satisfied with church and disciple mediocrity.

George Bullard, author and church coach, has named ten occasions that support mediocrity or complacency within a church (Bullard Jr., George W, *Pursing the Full Kingdom Potential of Your Congregation*, Lake Hickory Resources, St Louis, MR, 2005).

1. The absence of a major crisis or the absence of a highly visible "demon" robs a church of motivation for change.
2. Apparent signs of success rob a church of motivation for change (e.g., congregations experiencing biological or transfer growth, congregations constructing new buildings). With such visible signs of success why should change be considered?

3. Low expectations rob a church of motivation for change. Members are comfortable with a congregation that meets their basic spiritual, fellowship, and cultural needs. Mediocrity is confused with effectiveness.
4. Limited perspective robs a church of motivation for change. Lay leaders are rewarded for doing specific jobs with excellence in the congregation but never look at the whole congregational system. They know their particular area of responsibility but do not see how the “dots are connected” to move the congregation forward or how the congregation is moving backwards.
5. False measurements of success rob a church of motivation for change. Congregations measure success based on programs or budget achievement goals. Often the church is meeting these goals, at least in the eyes of the majority. Areas such as deepening spiritual depth and discipleship are more difficult to assess.
6. Interpretation of statistics robs a church of motivation for change. It may surprise some people to know that often a few people control the performance measurements in congregation. Spins on the figures may lead people to feel complacent about any perceived threats to the vitality of the congregation and thus need for change.
7. Rejecting new ideas and criticism robs a church of motivation for change. Critics may be treated like “outcasts” when they criticize or bring new ideas regarding the performance of the congregation. When critics get frustrated, they become silent or leave the congregation and no one goes after them or helps to discover the pearl of truth.
8. Denial of reality robs a congregation of motivation for change. Many people simply deny that the congregation is not reaching its God-inspired potential. This is particularly true if they are co-dependent on the congregation as it currently exists.
9. False values rob a congregation of motivation for change. In more congregations than most people would like to admit, the pastor, staff, or key lay leaders are expected to value morale (keep people happy) over mission.
10. Honoring revered leaders robs a congregation of motivation for change. Hardwired into the culture of many congregations that are more than a generation old is the core value that maintaining the status quo in honor of the founders or long-term leaders is a virtue. It holds on to traditionalism rather than change to meet Kingdom potential.

...the expectation to value morale (keep people happy) over mission robs a congregation....

We're in a new time beyond Christendom and Modernity

We no longer live in Christendom in which the culture, Christian faith, and the church are woven together in mutually supportive ways. We, here in North America (and, yes, also in “Mennonite enclaves”) live in an officially secular, religiously pluralistic, and diverse society. In addition, we live in a time when people’s worldviews go beyond the influence of the “enlightenment era” with its primary reliance on rational thought. Some writers bemoan the changes while others say it is the corrective that is needed. Because the culture is no longer nominally Christian, and the church is no longer allied with cultural

status quo, there is not only change but opportunity. Once again, the church has the opportunity to be what Jesus called it to be – “salt of the earth” and “leaven for the loaf.”

An online course on “Church and Culture in a New Time” by Anthony B. Robinson (www.uccvitality.org) provides some examples of the influence of Christendom and Modernity on the church and the new opportunities that exist:

- During Christendom we forgot how to change lives in a deep, Jesus-centered way, because we assumed that everyone was already Christian.
 - **Implication:** We need to rediscover the meaning of transformation for ourselves, for others, as central to the church’s life and purpose. The church exists to change lives and to heal people.
- During Christendom we focused the church’s teaching ministry on children and called it “Christian education,” because we figured everyone was already Christian and simply needed information.
 - **Implication:** It is time to re-learn Christian spiritual formation for all ages, especially adults and to rediscover the joy of faith as life-long and an ever deepening journey.
- During Christendom we came to think that most of our focus should be on maintaining and supporting the church as an institution, while “mission” was thought of as mostly far away or charity at home.
 - **Implication:** Today the mission field is all around us and everything the church does is mission. We are called to connect to the community and witness to the Gospel in word and deed right around us.
- As Moderns, we tended to make Christianity rational and reasonable and we particularly emphasized the moral aspect of Christianity.
 - **Implication:** Spirituality, the experience of God and God’s grace, is the basis of Christian life and morality. This needs to be rediscovered in 24/7 discipleship and corporately acknowledged in powerful worship, preaching, rituals, prayer.
- As Moderns, we tried to make Christianity universal, something that all rational people would find useful and acceptable.
 - **Implication:** We are free in this new time to enjoy the oddity of Christianity, the way Jesus doesn’t fit in, the way Jesus and his followers are different people who know a different story and different Lord.
- As people negotiating a new world, we value our churches, history, and ways, but we are not captives to the past or to the ways things have always been done.
 - **Implication:** Now is the time to discern what is best from the past and carry those values forward. It is time to try new things, some of which will work and some of which may fail. But even if the latter does happen, we can learn from flops. Instead of being “the frozen chosen,” a new time invites us to become risk-takers and innovators for the sake of the Gospel.

We are Clay Pots

The congregation, like humans, tends to run down and get a little stiff (even rigid). We grow accustomed to doing and being church in a certain way and can assume this is the only way. The Apostle Paul called us, our earthly bodies, the way we do things, even our institutions, “clay pots.” The clay pots might be interesting, even beautiful, but they do not matter ultimately. What matters ultimately, said Paul, “is the extraordinary power that belongs to God and does not come from us” (II Corinthians 4:7). Organizations, culture, and structures have a purpose and deserve appropriate respect, but they are clay pots. If they are not good for holding or carrying the extraordinary power of the God, then we may need to mend our pots or get new ones. The good news for the church is there is a “regenerative force” we call the Holy Spirit.

*The good news is...a
“regenerative force”
we call the Holy Spirit.*

If Formative Congregational Assessments are Helpful, why don't Congregations Use Them?

The proverb “know thyself” is often praised but seldom practiced. The same holds true for the church. The pressure for assessment is felt from all sides, but congregational assessment is not easy. The work team’s review of writings, reveal a multiplicity of reasons why assessments do not happen.

- Honest assessment of a congregation and leaders work is difficult because we are often too close to the trees to see the forest.
- Daily preoccupation with ministry concerns can make leaders “function-oriented” (like the two stone masons who were asked “What are you doing?” One replied, “Laying bricks.” The other replied, “Building a beautiful temple.”). If a leader’s vision is limited to “doing things,” assessment will become a list to check-off and not be analytically responsible to determine if the activity is meeting the larger goals.
- Finding suitable assessment instruments that fit both the size and the context of the congregation can be a problem. Some instruments seem geared to a certain size of congregations while others seem to have a certain framework or type of congregational function in mind.
- Assessments are often viewed as judgmental and emphasize the negative. There is a natural shyness about evaluation being somewhat un-Christian because of the voluntary nature of the church and the strong desire for mutual love, compassion, and respect.
- When using an assessment, it is difficult to be “objective” because close social relationships among various members of the congregations and roles of members, volunteers, leadership, donors, and recipients of services all tend to overlap.
- There is a resistance of modern management practices of measuring success as being secular rather than spiritual. Management practices are seen as conflicting with the Holy Spirit’s role of guiding the church.

- There is ambiguity in measuring church objectives—changing people’s hearts, worshiping God, etc. In addition, if the congregation does not have planned goals, there is a question about what is to be assessed.
- There is resistance to assessments by some because they anticipate that change may follow and they would rather not be outside of their comfort zones.

For a congregation to get past the resistance of assessments, wise leaders will need to team together. Leaders need to be honest about their own resistance or at least the increase in anxieties that may accompany congregational assessments. At the same time, leaders need to create a healthy environment in which committed people are invited to provide input and ask questions.

Leaders need to be honest about their own resistance...

Leaders play a crucial role in making sure the “ladder” and appropriate tools or processes are chosen, time is made available, and a team of people is assigned to implement the trip to the “balcony.” However, gathering the information and stories is not enough. Leaders are instrumental in helping the congregation reflect and learn. Reflection and learning is foundational for breaking the chains of complacency and developing openness to a journey of transformation.

Preparing the Congregation and Leaders for Formative Assessments

Congregational readiness for a formative assessment process takes intentional planning. Robert Leventhal, author of an article, “Congregational Readiness” (www.alban.org) names several factors beyond urgency to consider in determining congregational readiness for formative assessments.

First, **the pastor must be supportive, enthusiastic, and committed to the process.** The core leadership community (pastors, staff, lay leaders, and the governing body) will need to work together to support the process, reflect, discern, and implement changes based on the discoveries.

There will need to be financial commitment to the assessment process. Though congregations may choose to self-guide a process or use an outside facilitator, a financial budget for the preparation of materials and/or the facilitator is needed. The assessment process should not directly compete with other major congregational projects, such as a capital campaign. There is seldom energy to do both processes.

Congregational readiness for an assessment process includes some capacity for creative exploration. Some intermediate work might be helpful if verbal and nonverbal blocking to brainstorming and collaborative learning is great among influential “stakeholders.” It is also necessary for the congregation to have some level of trust within the group – faithfulness to God’s call for the congregation is the heart of everyone. Finally, congregations need sufficient capacity to manage what bubbles up from the assessment process.

Not all congregations are immediately ready for a formative congregational assessment process. Again, wise leaders will need to determine readiness. Leaders may choose to do some preparative work with the congregation to develop readiness, energy, and capacity for a formative assessment process. Be aware, however, that congregations are seldom perfectly “ready.” Leaders will need to actively lead the congregation toward formative assessments, or readiness could be used as an excuse to avoid the process.

Excellent Practices

section 3

Excellent Practices,

section 3

What makes a good congregational formative assessment process?

The work team studied a variety of assessment tools and processes. They also garnered wisdom from the experiences of those congregations that practice regular assessment. From these, the team began to summarize characteristics of a process that serves a congregation well.

1. The assessment process is **future oriented**. Although a process includes assessing past experiences, the purpose of the assessment process is for reflection, learning, providing focus for planning, and living into the congregation's calling for the next few years of congregational missional life.
2. Assessment is most effective when **the total congregational ministry** is assessed. This means the shared ministry of congregational members and leadership (pastoral and other leaders) rather than only looking at leadership's performance. (Resources for Pastoral Leadership feedback processes are available through Mennonite Church USA and the Lancaster Mennonite Conference Center.)
3. Assessments are most effective when they are **regularly scheduled and a normal** part of life together. There tends to be suspicion about the assessment process if it is done in response to conflict or crisis. (This resource is mainly addressing regular, periodic assessment.) Appendix B is a story from East Chestnut Mennonite Church that illustrates the importance of on-going feedback loops.
4. The assessment process is **adapted** to fit the particular congregation. One size does not fit all congregations when it comes to assessments. Neither does one tool gather all the information that could be assessed. The process of adapting the tool helps the team clarify the necessary substance of the questions and what information is going to be helpful for the assessment.
5. **A team of people** is selected to carry out the assessment process, along with the pastors' input and support. In some congregations, this is included in the role of a Pastor/ Congregation Relations Committee or the Governing Board. In other congregations, an ad hoc team is named through the recognized and appropriate channels.
6. An **outside skilled facilitator** can lend experience and provide a certain objectivity to the process that will build a safe environment where honest and constructive criticism is expected and valued. In most cases, the work team did not deem the congregation's bishop as an outside facilitator but bishops from other districts could serve as facilitators.

7. The assessment process **focuses on the congregational strengths as well as the weaknesses**. Strengths in congregational life and ministry should be affirmed, celebrated, and maximized. Prayerful and loving planning will be needed to address the areas that need strengthening.

8. The assessment process **gathers quantitative and qualitative information**.

Quantitative information is data that can be categorized and counted—through the use of surveys, attitude instruments, personality inventories, and so forth.

Qualitative information is data that describes the quality of something – through observation, interviews, group conversations, focus groups, and ethnographic studies.

9. The assessment process **provides opportunities for facilitated conversation and reflection** from the entire congregation or a broad representative group. These conversations are more important than the assessment data itself.

10. There is a **clear purpose for the assessment**. How the assessment’s learnings and reflections will be used is communicated to the congregation from the beginning.

11. **Questionnaires and surveys need to be signed by respondents** with the understanding that **confidentiality** will be practiced. Unsigned questionnaires are not considered valid because persons are not taking responsibility for what they wrote. The summary of the information gathered does not use names. Using a separate signature page from the questionnaire and using a numbering system allows the information to be compiled with confidentiality.

12. The **summary of the assessment information and reflections is widely available** in the congregation and the interpreted story from the data is communicated broadly. The assessment information and reflections are most valuable when it leads to additional open conversations.

What Key Areas of Congregational Life and Ministry should be Assessed?

The work team has listed **seven** key areas of congregational life and ministry that should be assessed in a comprehensive assessment or in a series of assessment. These areas do not necessarily need to be assessed all at one time—rather some of these areas of congregational life and ministry may deserve more focused attention at a different time. Also included are examples of components that are part of each key area.

Identity formation

1. Congregational Identity
2. Common Core Values
3. Congregational culture/self concept
4. Celebration and Worship

Focus and Intentionality

1. Vision for Mission
2. Specific Missional Calling
3. Contextual Understanding of Local and Global Neighbors
4. Readiness for change

Spiritual Depth, Discipleship and Equipping

1. Christian Spiritual Formation of Children and Youth
2. Christian Spiritual Formation of Adults (Young adults – Seniors)
Appendix C is an Annotated Bibliography of self-assessment tools for Spiritual Growth/Maturity
3. Mentoring exploring and new believers
4. Teaching/Preaching
5. Spiritual Disciplines

Generosity of Gospel, Gifts, and Resources

1. Gifts Discernment and Engagement
2. Mutual Hospitality
3. Care/Justice Ministries
4. Evangelism
5. Stewardship

Loving Interpersonal Relationships

1. Welcome and Assimilation
2. Holistic care
3. Ability to embrace diversity
4. Interpersonal skills
5. Conflict Management skills
6. Membership Covenant
7. Fellowship and Play

Multiplying Leaders, Ministries, and New Churches

1. Leadership Development
2. Partnerships for ministry
3. Developing responsive ministries to unmet need
4. Plant and multiply worship/discipleship communities

Functional Structures and Leaders

1. Empowering Leadership
2. Decision-making processes
3. Orientation/Training volunteers
4. Communication
5. Administration
6. Facilities
7. Financial Planning

How would a congregational assessment team proceed?

Once a congregational assessment team has been selected, a procedure for assessing the life and work of a congregation usually includes the following steps:

1. Clarifying why the congregation wants/needs to assess its life and work
2. Determining what information is needed and how that information will be collected
3. Collecting the information needed
4. Studying, analyzing and interpreting the information collected
5. Determining what is to be done as a result of the evaluation

Step 1: Clarifying why the congregation wants/needs to assess its life and work

Churches have many different reasons for assessing their life and work, so it is important that the assessment team is clear about why this assessment is being done. Is the assessment to plan for the future, to assess program effectiveness, or to prepare a church profile as part of a pastoral search, etc.? Since the assessment team is usually an ad hoc appointment, it is important that the assessment team and the body who called for the assessment are on the same page. The “why” for the assessment will identify what to assess. The rationale may also influence how to go about doing the assessment. Even if it is concluded that the congregation assessment is primarily because it has not been done in many years, the team will need to clarify what is wanted or hoped that an assessment at this time will accomplish. This purpose will need to be communicated over and over again throughout the process to all involved congregational members.

A few words of caution:

1) Many persons begin an assessment process by beginning with an assessment tool and then shaping their purpose around the tool. An assessment tool is an important part of an assessment, but not the most important or even the first step of the process. Determining the purpose of the congregational assessment is the most important.

2) Some persons wish to resolve conflict through assessment. All of the resources indicate that it is harmful to try to conduct a ministry assessment at a time of great conflict in the congregation. Congregational assessments cannot resolve a conflict. In the case of conflict, it is recommended that the pastor and the congregation seek the counsel of their bishop or conference office for assistance.

3) Occasionally a group of persons in the congregation will determine that they are the only persons who need to be informed about or involved in the assessment process. The decision to conduct a congregational or program assessment needs a high degree of trust and support, especially from the leaders and governing board and involvement among the church members. Clarifying the rationale for a congregational assessment will help develop the support for it. Open communication will build trust and participation while secrecy will destroy trust.

One of the decisions that will need to be made in this step is whether or not the congregational assessment will include personnel evaluations/pastoral performance feedback. If so, the assessment team will need to determine how and how extensively this will be done. Some people believe that it is impossible to assess the life and ministry of the church without evaluating the performance of the pastor. Some believe that it is possible to assess both the church's ministry and give pastors performance feedback by using the same data-gathering assessment process. Others believe that it is best to use two separate assessment instruments and processes; these separate assessments may take place at the same time or at different times. That doesn't mean that there is no overlap. But having separate processes help the congregational members claim their responsibility for the congregational life and ministry and prevents making the leaders the scapegoats. Timing for performance feedbacks should be planned with the pastor, bishop and the appropriate governance body. Excellent pastoral feedback resources are available from Mennonite Church USA at <http://www.mennoniteusa.org/Default.aspx?tabid=239>

Step 2: Determining what information is wanted and how that information will be collected

An important part of any assessment is obtaining information or data that will allow the congregation to make the assessment or judgment it seeks to make. To determine what information is needed, the assessment team may find it helpful to think in terms of two kinds of information. One kind of information is factual or statistical. The other kind of information is more subjective, composed primarily of persons' opinions.

The factual information includes the history of the church, membership statistics, budget, and community demographics. These statistics help provide the needed background and context for your evaluation. The opinion-oriented kind of information included what members think about the programs of the church and about how decisions are made; how they feel about the history of the church, its budget or the demographics of the community; what they think ought to be done in the life and work of the church; and what their needs and hopes are. This information helps get a sense of where members are, both individually and collectively, in terms of their satisfaction with, support for, and hopes for the life and work of the church. Both kinds of information together help to get a

sense of who the congregation has been, who they are now, and what it is doing now. The assessment will also get a sense about how the congregation feels about itself now and to understand who it seeks to become. Both statistics and opinions help to determine God's call and the congregation's response to that call.

Churches use many different methods and instrument/tools for collecting the information they need. The assessment task group will need to choose the method and tools that will best gather the information needed and are sensitive and sensible for the dynamics of the congregation. The following examples show a range of methods and instruments used in evaluating processes for local churches:

1. Evaluation by Reviewing Congregational Goals

A congregation that regularly sets its own congregational goals can focus its assessment on those goals. Such an assessment can be done by the governing board and those who implemented the goals. Looking at each of the goals, the following questions can be asked: How well did we achieve this goal? Are we observing and measuring the right things? How do we feel about the level of achievement? What did we learn as we implemented this goal? What new actions are needed?

Looking at all of the goals collectively, the following questions can be asked: How well did these goals enable us to be an effective and faithful church? Which of these goals need to be continued? What new goals are needed for the congregation?

An advantage of this approach is that the assessment has a focus and a point of reference. A potential disadvantage is that the goals may not cover the whole of the life and ministry of the church; therefore, the assessment would result in only a partial evaluation of the church. Another potential disadvantage is that the information for the assessment is offered by only a limited number of persons.

2. Evaluation By Rating

If a broad sample of subjective opinion from a wide audience is wanted, then a rating instrument could be used. Such a tool would allow the assessment task team to use a rating scale for rating the condition, performance or functions of the church. For example, all congregational members could complete a written or/or electronic questionnaire, responding to each question on a numerical scale such as from 1 – 6, **consistently** labeling the scale for which it represents. The western mind is accustomed to read from left to right with lower numbers representing a negative view point and larger numbers moving to the positive. (Strongly disagree, disagree, somewhat disagree, somewhat agree, agree, strongly agree) Note that often an even number of options are used to eliminate a mid-point of "neutrality." At the end of each section, space should be provided for written comments. One section should be reserved for a collection of demographic information so that answers can be cross-referenced by age groups, education levels, length of membership and other statistical criteria.

Building the questions

Great care must be taken in developing the wording of questions and statements as it all too easy to build bias into the process. A core human behavior is to seek approval and avoid conflict, so people can be lead into telling the questioner what is perceived to be the “right” or “best” answer, rather than an authentic answer.

For example, let’s say that church leaders want to know the members’ responses to music in worship services. If the leaders like the way music is being done, the natural question might be, “We are successful at blending styles of music in worship at _____” with the range of answers to strongly disagree to strongly agree. Instead, the question could be worded, “The music in worship helps me to focus and worship God.” In this way, the respondent is not just responding to whether blended music has been achieved but provides insight into his or her attitude or perception of the whether the music accomplished a particular purpose.

An advantage of this method is its simplicity. A potential difficulty is determining what items will be evaluated, and whether those items collectively provide a complete enough picture of the church. A potential disadvantage is that this type of rating instrument tends to focus on the past rather than on future expectations.

3. Evaluation According to a Specific Understanding of the Church

This approach utilizes a specific perspective, understanding or theory of the nature of your church and its ministry. Generally, a summary of that perspective or understanding is articulated, and certain categories out of that perspective or understanding are used as a basis for the evaluation. For example, the entire congregation could be asked to complete a worksheet, responding to categories of questions with brief essay answers. For example: Specific missional habits of thriving congregations are described and members assess how well the descriptions describe their congregation.

The helpfulness of this kind of approach is that the specific perspective provides a framework for evaluating the church. The assumptions and presuppositions underlying the evaluation are clearly articulated for the persons completing the evaluation instrument. A potential drawback is that this kind of evaluation may not allow you to get at the nuts-and-bolts issues in the life and ministry of your church.

Step 3: Collecting the information needed

There are at least three general approaches to gathering assessment information. The congregational assessment team will need to use whatever method or methods that will be the most successful at collecting the information needed. A general principal to follow is to solicit information from those whose lives will be affected by the evaluation. If possible, give all members a chance to provide information.

The following options offer some of the possibilities in collecting information for your evaluation:

1. **Face-to face.** Sometimes this format is interviewing and sometimes it is filing a report. The success of this method depends on three factors. First, the two parties need to have a basis of trust and communication. Second, both parties need to understand the nature of this feedback and, if possible, to have the questions ahead of time for the benefit of prayer and reflection. Third, it is important that there be consistency and accountability so that each person is asked the same questions and that any opinion or information is properly recorded.
2. **Focus or Cluster Group.** In this method, a facilitator skilled in group dynamics works with a group of 8-12 persons of different ages and backgrounds. Ideally, there are three or more such groups. In a period of an hour and a half, they all are asked the same questions. Representing a cross-section of view-points in the more general population from which feedback is desired, conversations can be stimulating and animated. The facilitators try to maximize the participation of each person and deal skillfully with domineering contributors. Taking notes as each person talks and remaining neutral, the facilitator writes a summary of the comments at the conclusion of the focus group process.
3. **Surveys-Written or Electronic**
 - **Survey by mail**

You may consider including a copy of the evaluation instrument in your church newsletter, mailed out to each church member. Ask each person to complete the evaluation instrument and to return it to the church by mail or by dropping it off after Sunday worship. Be sure to include a deadline for all responses.
 - **Survey as Part of Sunday Worship**

If your survey is brief, you could set aside about five minutes during or after specified Sunday worship service to distribute the evaluation instrument, ask persons to complete it, and collect it.
 - **Electronic surveys**

Zoomerang (www.zoomerang.com) and SurveyMonkey.com (www.surveymonkey.com) are two of several electronic survey web sites where, for relatively little financial investment, the congregation can develop email surveys on various ministries and topics. Usually the electronic surveys contain no more than 30 questions and can be completed in about 5-7 minutes. Most young people are very comfortable with e-surveys while the older people in the congregation may not be as comfortable.

Step 4: Studying, analyzing and interpreting the information collected

After the information has been collected, the Assessment Team and the congregation will need to study results carefully. What does the information indicate about your church's life and work? What interpretations can be given to it? What interpretations can not be

made? What does the information suggest about what is needed for strengthening the church?

For example, let us assume that you used an evaluation instrument that asked persons to respond on a rating scale to this statement: “New people are valued and assimilated into the fellowship of the congregations.” If the response from the members is overwhelmingly “definitely yes,” then this suggests that you are a hospitable church and that you are aware of visitors in your midst. Yet, if also asked how many visitors or new attendees did you connect with on the phone or in person in the last three months outside of a Sunday morning? The Assessment Team will then need to determine how members’ impressions are supported with actual behaviors.

Step 5: Pulling the information together in multiple ways, summarizing, discussing and determining what is to be done as a result of the evaluation

The congregational assessment team will compile the information gathered and prepare it for the leadership and congregational membership’s discussion. This presentation of information is a valuable service for the congregation. To do this well, the congregational assessment team will need to look at the data in many different ways, ask good questions, decipher and interpret for themselves in preparation to present it to others. Yet at the same time, the team should hold their interpretations lightly as to allow others to engage and ask their own questions. The conversations about the data/ information and its meaning, become the “holy conversations” of discernment. It is important that these conversations continue until a summary of resulting decisions and plans are communicated and set into motion.

The worst possible outcomes are to file away the input for later use or to reject it, even quietly, when it does not support prevailing policy or “common knowledge.” If leaders and the congregation have entered into a formative assessment process and feedback was solicited, they must be ready to use it!

A Final Word

Taking stock of the congregation’s life and ministry is an important part of the church’s ongoing journey of spiritual transformation and missional effectiveness. The ultimate aim of a formative congregational assessment is to be faithful and effective in the mission to which God has called, empowered and sent the congregation as part of the Church of Jesus Christ.

Sample Tools and Processes

section 4

Sample Formative Assessment Processes from which to draw

To repeat from the preface, the information presented and formative assessment processes described in this resource are by no means exhaustive. Rather, they represent some of the variety of tools available in a review of writings on this subject. Also represented are those assessments that Lancaster Mennonite Conference or other Mennonite congregations have had some experience in using.

- No single tool alone can serve every congregation but will need to be adapted to fit the specific needs of the congregations.
- No single tool helps a congregation examine every aspect of congregational life.

Our expectation is that by giving information about specific tools, congregations and leaders will be able to choose and adapt to address their context. We plan for this toolbox to be periodically updated. Leaders will be notified when new processes are added to the toolbox through the Lancaster Mennonite Conference Website.

- A. **Appreciative Inquiry** (Branson)
- B. **Church FutureFinder** (Church Innovations)
- C. **Church Planning Inventory** (Harvard)
- D. **Complete Ministry Audit** (Easum)
- E. **Discerning Your Congregation's Future** (Alban Institute)
- F. **Facing Reality** (Bandy)
- G. **Highly Effective Church Inventory** (Barna)
- H. **Missional Church Culture Assessment** (Milfred Minatrea)
- I. **Natural Church Development** (Swartz)
- J. **Spiritual Strategic Journey** (Bullard)
- K. **Vital Signs of a Healthy Church** (Jones)

Samples of most of these tools are available to be reviewed through the Congregational Resource Center of Lancaster Mennonite Conference.

Appreciative Inquiry

Source: Appreciative Inquiry is a process and conversation that helps organizations of any kind focus on the best practices and positive energy at work within its members. Mark Lau Branson, professor at Fuller Theological Seminary, has adapted Appreciative Inquiry concepts for congregations in his book *Memories, Hopes, and Conversations: Appreciative Inquiry and Congregational Change* (Alban Institute, Herndon, VA, 2004). He writes, “Appreciative Inquiry is a different way for the people of an organization to know, to communicate, to discern, and to imagine (concerning themselves, their past and future).” p.19

Cost: \$18.00 for the book

Time involved: 3-4 months

Administration: A listening team leads the process that has four different stages. Initiate, Inquiry, Imagine (which includes creating provocative proposals), and Innovate.

Purpose: Appreciative Inquiry provides an opportunity for the entire community to come together and discover what is valued about a particular mutual ministry. The process seeks to discover those “things” that give value to the community and build on those values. In discovering the value, seeds are found for the development of future ministries and the resources needed. The valuing process provides the inspiration to make continual improvement in the direction of increasing value while holding the member’s varied stories in the collective consciousness. Appreciative Inquiry celebrates the accomplishments and creates energy in the direction of enhancing that which is valued.

One important aspect and art of Appreciative Inquiry is shaping the questions. Branson stresses the importance of articulating the questions in such a way that participants are engaged at multiple levels. Appreciative Inquiry moves through memories, current practices, and hopes/dreams to spark imagination within the group. Branson gives examples of questions for a particular ministry area, for relationships, and for looking at the totality of the congregational life and ministry. Following are samples of appreciative inquiry questions:

- Tell a story of a time in the last 12 months when you felt most excited and motivated about your involvement in this congregation. Why do you think it was meaningful?
- Describe some relationships that you have within the congregation and how they are valuable to you. How might more opportunities for such relationships be developed?
- When has this congregation been most responsive to God’s initiative of renewal?
- How do we express God’s love, mercy, and justice to others?
- In the last 12 months, what has been one of your own experiences of relating Christ’s love to others beyond the church’s community? What did you learn about yourself, God, and others?
- What three wishes do you have for this congregation?

Additional sample questions are available in the appendix of Appreciative Inquiry and at www.clergyleadership.com.

Appreciative Inquiry Story

Akron Mennonite Church, Akron, PA invited several groups within the congregation to gather significant data through Appreciative Inquiry as part of our overall vision work. After training a team of listener/scribes, we met for several hours on a Sunday afternoon with the charter members of the congregation. Significant time and effort went into shaping the questions to fit the situation. We shared the following questions with our charter members ahead of time which allowed ample time for reflection and engagement:

1. When you think of the formation of Akron Mennonite Church, how did you experience God at work in the process and what gave you hope for the future of the church? As you remember those first years, what was most engaging and powerful?
2. Since 1959 you have participated in numerous changes – ways that God worked among us to deepen our faith and faithfulness. Tell us about one or two times when you believe the church was responsive to God's initiatives in renewing or deepening or challenging us – and what was the result? Who was involved and what happened?
3. As a founder you have a unique perspective on our church today. In all of our relationships and ministries, what is currently most encouraging and hopeful for you? What are the most important signs of God's grace?
4. If you had three wishes for the next few years of our church, what would they be?

One criticism of Appreciative Inquiry is that it glosses over or ignores the negative history or failures within an organization. Just the opposite was true in our experience at Akron Mennonite Church. The charter members wove in numerous examples of brokenness, conflicts, and failure in their Appreciative Inquiry session. One member said “We could have easily split two or three times over some of these issues.” Appreciative Inquiry makes room for all memories and experiences, both good and bad. The fundamental difference is the starting point. Instead of a problem to be solved, we begin with our stories, our strengths, best practices, and a shared imagination. Moving toward implementation (Branson supplies a helpful “processes and steps guide”) feels organic to the Appreciative Inquiry process. Once people have been heard and a shared narrative has been uncovered, the results can be both provocative and generative for congregational life.

Finally, beloved, whatever is true, whatever is honorable, whatever is just, whatever is pure, whatever is pleasing, whatever is commendable, if there is any excellence and if there is anything worthy of praise, think about these things. (Philippians 4:8)

Written by Jim Amstutz

Resource people: Jim Amstutz, Akron Mennonite Church
Marcus Smucker, East Chestnut Mennonite Church
Church Ministries Staff, Lancaster Mennonite Conference

Church FutureFinder

Source: Church Innovations, www.churchinnovations.org (*a similar process is part of the first year of the Partnership for Missional Church cluster experience but it is described here as a stand alone process*)

Cost: \$70.00

Time involved: Four months for gathering information and stories; reflection will take an additional four months.

Administration: A team of 4-7 persons provide leadership and manage the collection of stories and data. The information is keyed into a web-based resource and a report is created to help with study, analysis, discernment, and planning.

Purpose: The purpose of Church FutureFinder, a web-based tool for self-discovery, is to help congregations examine God at work in the world and in the congregation. This tool prompts leaders to develop a biblical, missional imagination. It uses ethnography (a process of “putting a culture into writing” from the point of view of an insider and community by recording interviews and interpreting data.) Church FutureFinder also uses demographic data and spiritual discernment through a discipline of Dwelling in the Word and Theological Refection. This tool helps a team of leaders:

1. Gather and Tell the Story of the Congregation
2. Gather and Tell the Story of the Neighbors
3. Gather Demographic Data of both Congregation and Neighborhood
4. Interpret these Stories in light of God’s story
5. Discern the Congregation’s part in God’s Mission

Through listening interviews with congregational members, the gathered stories become a narrative that helps to describe the culture of the congregation, its values, and perceived purpose. The process also gathers stories and develops a narrative of those in the neighborhood. The study of the cultures and reflective, theological questions help the team become “detectives of the Divine.”

Assessment areas: The Congregational Study is divided into thirteen Sections with theological reflection questions prepared for each section:

- Congregation information
- Denomination information
- Population and demographics
- Finances
- Attendance and membership
- Transportation patterns
- Building use
- Civil society/community interviews
- Local congregation-leadership, history, and heritage
- Congregational interior interviews
- Congregational culture-mission, vision, values, symbols, rituals, and metaphors

- Neighborhood interviews
- Neighborhood symbols, rituals, and metaphors

Church FutureFinder Story from James Street Mennonite Church

James Street Mennonite Church and Church FutureFinder

Georgia Martin, one of the knitting ladies, was surrounded by third and fourth grade girls and boys eager to show her their progress or to have her help with a dropped stitch. Georgia and several others from James Street Mennonite church have been teaching knitting at an after-school club at Wharton Elementary School. There is a waiting list of kids who want to join the knitting club. What is the draw?

A clue was given by a little girl that nestled herself up to Georgia one afternoon. She commented, “Miss Georgia, you know why I love coming to knitting club? Although Georgia guessed that it might be the attention and affirmation, she encouraged the girl to tell her. “It’s because it is so peaceful here,” she responded. Georgia reflected—it was very chaotic and far from quiet—yet this little girl felt peace rest upon her.

The fact that a third grade girl verbalized that peace was the reason that she loved knitting club encouraged the volunteers from James Street Mennonite Church. As part of an intentional journey with Partnership with Missional Church, the congregation had been dwelling in Luke 10: 1-12 for almost a year. This girl’s comment confirmed that these church members volunteering in the local elementary school were to be there sharing peace just as Jesus instructed his followers in Luke.

The relationship between James Street Mennonite Church and Wharton Elementary School only 3 blocks away now seems natural. Besides the knitting ladies from the church that weekly spend two hours after school, additional volunteers bag groceries for the Friday Power Packs. These are bags of groceries discretely distributed to eligible families so that students have a source of nutrition over the weekends. Offerings are gathered to provide school uniforms for those who do not have a source. There are prayers for the teachers and the principal along with help with fund-raisers. The Wharton Elementary students who attend the congregation keep the entire congregation informed of their latest happenings.

Four years ago, James Street congregation began the Partnership for Missional Church process of spiritual discernment. The first year is a year of discovery and uses the tool, Church FutureFinder. Through Church FutureFinder, the congregation learned about its internal values and culture along with the community’s culture. One example of learning was that church members had made the decision for the congregation to stay in the city of Lancaster, yet there was not a particular connection to the neighborhood immediately around the James Street location. The relational bridge to the community began as Church FutureFinder tool helped the congregation interview a variety of civic leaders and neighbors.

The Wharton Elementary School Principal was one of the civic leaders chosen. Mrs. Hair welcomed the interviewers into her office and seemed absolutely delighted that there was interest in the well-being of the school, teachers and students, without a particular “agenda.” She was a source of a great amount of information about the neighborhood and the school. Mrs. Hair informed the interviewers how important the after-school program was in caring for the wellbeing of children that would otherwise go to an empty, unsupervised home because of working parents. She also communicated the many assets and other needs of the neighborhood which consists of families from the full economic spectrum. As the congregation began to discern a specific calling that matched the stated needs with the gifts and passions of the congregation—the school partnership began.

The congregation discovered that the School District of Lancaster serves approximately 900 students who are homeless or staying with friends or relatives. When a consortium of churches and social services developed a plan for an Emergency Winter Shelter that very same year, James Street congregation jumped on board. The Luke 10: 1-12 scripture text had shaped the Ministry Team so that the decision to host the shelter is referred to as “a no-brainer” and over 80 volunteers from James Street alone have stepped up to be involved.

Later almost 200 neighbors were interviewed by congregational members with the help of a pastoral intern in the Study and Training for Effective Pastoral Ministry (STEP). The church members found that people really welcomed an opportunity to tell them about the neighborhood, their history, the changes they saw, their dreams and concerns. Many lamented that it seemed more difficult to build the neighborly connections and longed for something like a block party. Thus James Street solicited their help in organizing three summer block parties with music and, of course, food.

There are still many relational bridges to build with neighbors, but James Street is no longer the stranger. The Church FutureFinder was a tool which helped gather information about the context and asked many questions, hard questions—yet in the search and discernment of how God is at work—a small part of the congregation’s missional purpose in the community began to emerge.

Written by Alonna Gautsche Sprunger

Usage: Congregations that have used this tool are: Capital Christian Fellowship, East Petersburg Mennonite, James Street Mennonite, Marietta Community Chapel, New Danville Mennonite, Lititz Mennonite, and Oxford Circle Mennonite.

Resource people:

Conrad Kanagy, Lancaster Mennonite Conference staff
Curtiss Kanagy, New Danville Mennonite Church
Church Ministries Staff, Lancaster Mennonite Conference

Church Planning Inventory

Source: Harvard Institute for Religion Research, Hartford Seminary

Cost: \$.50 per blank questionnaire
\$3.00 per questionnaire tabulated
\$100 Administrative fee

This inventory, used by many congregations from many different denominations, was recently redesigned with the help of a grant from the Lilly Endowment, INC. It is user friendly and reflects the insights from the most recent up-to-date social science research on congregation. Samples of the inventory and the report are available at http://hirr.hartsem.edu/leadership/church_inventory.html.

Time: 2-3 months

Administration: A team of 4-6 people

Purpose: The purpose of the paper questionnaire (210 items) is to help the congregation think about its present life and plan for the future. The survey asks several sets of direct questions about the person's perceptions of the current ministry and future goals of the congregations. It also includes a set of broader questions regarding the person's involvement. The questionnaires are distributed to everyone or to a random sample of the congregation's attendees. The team collects and sends the completed inventories back to Hartford Institute. The Institute will tabulate the results, transcribe the comments verbatim, and return two copies of the findings within 3-4 weeks of receiving all the completed questionnaires. The Assessment Team also receives brief instructions to assist in interpreting the results along with a reporting of average scores from churches that have used the survey recently for comparative purposes. The task of interpreting the report is the task of the team. The results of a congregation's survey can be compared with other denominational congregations or congregation of other traditions.

Assessment areas: The sections of the questionnaire deal with:

- tasks of the church,
- organizational processes,
- congregational identity,
- church facilities,
- member's backgrounds, and
- theological and faith practice characteristics.

Complete Ministry Audit

Source: William M. Easum, author of book and accompany CD-rom-disk, *The Complete Ministry Audit, How to Measure 20 Principles for Growth*, Abingdon Press, Nashville TN, 2006

Cost: \$25.00

Time involved: 6-8 months

Administration: A team of 4-7 people self-administer the surveys and questionnaires to different target groups within the congregation. A CD-ROM helps to organize the information for study, analysis, and planning.

Purpose: This detailed workbook for measuring twenty congregational growth principles explains how congregations can reach out to people instead of concentrating on their institutional needs. It is based on the Easum's Basic Law of Congregation Life—*“Churches grow when they intentionally reach out to people instead of concentrating on their institutional needs. Churches die when they concentrate on their own needs.”*

Among the areas assessed are:

- meeting peoples' needs
- worship
- leadership and ability
- space and distance
- visitors
- money
- planning, and
- readiness for change.

The process also assists leaders to understand the congregation's particular character, diagnose problems and opportunities, plot strategies to remedy problems, extend mission into the community, and change. *The Complete Ministry Audit* uses congregational surveys and questionnaires to give church leaders the best tools available for plotting their congregation's course.

Author William Easum provides instructions to implement the process for evaluating a given church and provides reproducible forms for use. After surveying congregational members, there are additional evaluation forms for the church's official body and staff. Suggestions for visually reporting results are provided. Also included is a list of recommended readings and an appendix with questions for evaluating the bulletin, the parish newsletter, and the church property.

Discerning Your Congregation's Future

Source: Roy Oswald & Robert Friedrich Jr. authors of a book *Discerning Your Congregation's Future*, Alban Institute, Herndon VA, 1996.

Cost: \$19.00 for the book

Time involved: 4-8 months

Administration: A team of 4-7 congregational members plan the process. An outside facilitator is recommended to lead the three congregational evenings of reflections.

Purpose: In *Discerning Your Congregation's Future*, Oswald and Friedrich lay out a process of spiritual discernment that is grassroots oriented and based in the present reality of the congregation. While it clearly guides toward listening for God's direction for the congregation's future, the process invites the entire congregation into the discerning process. The strategic and spiritual approach challenges the congregation to look at who they really are and how they live together in community and mission.

Information for provisional goals is gathered by a task force through an exercise of ministry assessment* and three congregational meetings.

An Evening of Historical Reflection

- Congregation gathers to tell stories about its history
- Highlights leaders (bishops, pastors, deacons), missionaries, key events
- Identifies the values from a congregation's past that God wants carried into the future

An Evening of Norm Identification

- Congregation gathers to reflect on its "unwritten rules"
- Highlights those things within the community that may be under the table yet guide how persons interact and do things as a church
- What are the unwritten rules God is calling the congregation to address and/or clarify?

An Evening of Interviewing Key People in the Community

- Congregation gathers to hear 3-5 community leaders talk about needs they see and how a congregation your size could respond to those needs
- Congregation is invited to dream of ministries that could respond to the needs
- What are the ministries to the community God would have the congregation expand, develop, or support?

The long list of provisional goals is compiled and each provisional goal is categorized in one of four categories:

1. Strengths to build on,
2. Needs and problems to address,
3. Call of the community, and

4. Aspirations for the next four/five years.

At a fourth congregational meeting the entire congregation gathers to discern together two goals in each category.

*The “Strength for the Center: Congregational Health Inventory,” developed by Roy Oswald, is a survey, provided in the appendix and can be self-administered. The key elements assessed are:

- Proclamation
- Community development
- Service
- Communicating the tradition (primary Christian education emphasis)
- Welcome and assimilation
- Pastor/congregation dynamics
- Congregation vision
- Leadership

The scoring interpretation is based upon size of congregation (family, pastoral, program, and corporate.)

Discerning Your Congregation’s Future story (Story from Landisville Mennonite) An Interview with Pastor Randall Shull regarding this process used at Mount Joy Mennonite Church

What motivated Mount Joy’s leadership team to pursue a process to answer questions of “who are we” and “what are we called to be and do”?

Pastor Randall: The motivation for the Mount Joy leadership team was to work toward a shared vision in the congregation, a vision owned by both the congregation and its leadership. We were also in the middle of a building project and we wanted to make sure the completion of the building or the building itself did not define us and our mission.

How did you choose the Discerning Your Congregation’s Future process?

Pastor Randall: In order to have a **shared** vision and commitment we wanted the members of the congregation to be involved in discerning and shaping the direction. This could not be something that the Leadership Team presented and called for commitment rather we needed grassroots involvement from the beginning. I think it is fair to say that the congregation sentiment was that “we don’t do strategic planning.” Strategic planning was either described as “navel gazing” or a planning exercise that ended with a product that wasn’t doable. So it was not only important that the process involved congregational members but that it was concise and fun so that it kept people engaged.

So Discerning Your Congregation’s Future fit those criteria?

Pastor Randall: Yes, and much more. The creator of the process, Gil Rendle, is a church consultant with Alban Institute and we knew that this process had been tested many times. The four congregational meetings, each with a very specific and different focus, we thought could hold our attention while not feeling particularly like strategic planning. An appointed task force, --not the leadership team-- represented the age, sex and tenure demographics of the congregation, led and

sifted through the information. We also knew a local consultant that was versed in this process. He facilitated the task force and the process, helping us ask questions about the data and encouraging the task force to dig deep. I served on the task force, alongside the consultant, providing a communication link between the task force and congregational leadership.

Tell me about the four meetings that involved the members and attendees of the congregation.

Pastor Randall: Since we were in the middle of a building project, we used our old meeting house on the Kraybill Mennonite School campus for the meetings. This was a gift representing that change has happened many times to this congregation and that change will always be a part of our congregational and ministry journey. The first meeting was on Historical Reflection. It involved telling stories. People like to tell and listen to stories. These were stories that had formed us as a community. Some of the stories were new to the most recent members. This was a fun meeting where community happened. It is a momentum builder for the rest of the process.

The second meeting uncovers the unwritten rules in the congregation. It involves naming the norms (behaviors and values) that guide interactions and the way of doing and being church. At this meeting the newer members had perspectives that were very helpful. A pinnacle of deep learning from this meeting was actually naming and talking about the patterns of behaviors or habits we have in dealing with conflict. We didn't fall apart talking about how we deal with conflict. Growing in our understanding of how we deal with conflict and to learn new patterns became one of the goals chosen by the congregation.

Tell me about the community interviews. What did you learn from that meeting?

Pastor Randall: The task force identified and created a panel of community and civic leaders who knew the community. These included a representative from Love, Inc., Office of Aging, Mayor of Mount Joy and a representative of Rainbow's End, a local Youth Ministry. Another source of excellent information is the principal of a local school. This meeting gave us new eyes to see our community. It was sobering to see the needs of real people and the opportunities to partner in ministry in our town.

What does the task force do with all this new information?

Pastor Randall: Mount Joy also used the Church Planning Inventory by the Harvard Institute to give us a different picture of our congregation by using qualitative data. The task force looked at the notes and summarized along the way, but in this step they develop numerous provisional goals based on the data of the survey and the conversations from the three congregational meetings. These provisional goals focused in four different areas: strengths to build on, needs and problems to address, call of the community, and aspiration for the next four/five years.

What is meant by aspirations in this setting?

Pastor Randall: In my words, aspirations include identity questions that take major energy, such as "Who do we discern God is calling us to become" or a congregation could understand aspirations as major ministry initiatives that might take significant planning to develop.

What's next?

Pastor Randall: The task force presented all of the provisional goals on a Sunday morning and called the congregation to a week of prayer and fasting. We met a week later and asked the congregational members to prioritize the provisional goals until we were able to choose two goals in each of the areas of strengths to build on, needs and problems to address, call of the community, and aspiration for the next four/five years. We ended up with nine because there seemed to be a strong call from the congregation toward a third goal in one area. Finally the goals were handed over to the Leadership team to develop strategies and plan the work in the goal areas.

What would you say to a congregation who is considering this process?

Pastor Randall: I have experienced this process with three different congregations. The first was with Mount Joy as the associate pastor and a part of the task force. The second is current, as a fairly new lead pastor of Landisville Mennonite. Here the discernment/planning process was done before I arrived. At Landisville the process has led to new roles on the Ministry/Leadership Team. Most recently, I was the outside facilitator at Chestnut Hill Mennonite Church where it is a privilege to be invited into the sacred stories of another congregation. I would begin by asking, any congregation considering this process, "what do you hope to get out of the process"? I ask this question because the expectations of the leaders and what is communicated to the congregation need to match the tool in content, ability and style. The Discerning Your Congregation's Future works well to guide the congregation toward a number of goals or ministry priorities that can focus the work of the congregation for the next period of time.

This interview with Randall Shull was conducted on October 15, 2008. Pastor Randall is currently Lead Pastor at Landisville Mennonite Church. This interview recounted Mount Joy Mennonite Church's 2006 experience of Discerning Your Congregation's Future process while Randall Shull was Associate Pastor there.

Interviewer: Alonna Gautsche Sprunger

Usage: Recently used at Mount Joy Mennonite, Landisville Mennonite, and Chestnut Hill Mennonite.

Resource people:

Randall Shull, Landisville Mennonite

J. Samuel Thomas, Bishop of Landisville and Manor Districts
Church Ministries Staff, Lancaster Mennonite Conference

Facing Reality

Source: Thomas Bandy, author of *Facing Reality* book and CD-ROM, Abingdon Press, Nashville, TN, 2001

Price: approximately \$25.00

Time involved: The work sheets and questionnaires can reasonably be completed in about three months, but will vary depending upon the current state of church records and the size and energy of the planning team. It will take longer for the congregation and leaders to digest, interpret, and use the learning for future planning.

Administration: A team of 3-7 people self-administer the surveys and questionnaires for the different target groups within the congregation. A CD-ROM helps to organize the information for study, analysis, and planning.

Purpose: This congregational mission assessment tool enables church leaders to examine congregational life honestly and thoroughly and point the congregation beyond itself toward mission in the postmodern world. Mr. Bandy starts with the premise that in the 21st century, tweaking or changing a program, curriculum, staff change, an outreach mission, or some creative idea is not enough to leverage sufficient change to address the needs of the post-modern world. It will take a redesigning of the entire system of congregational purpose and life.

Assessment areas: Facing Reality assesses 11 subsystems of congregational life with an additional guide for gathering helpful neighborhood demographic data. The subsystems are:

Foundational:

- The identity of the church (genetic code)
- Core leadership (the seriousness for mission)
- Organization (the structure)

Functional:

- Changing people (how people experience God in the church)
- Growing Christians (how people grow in relationship to Jesus)
- Discerning call (how people discover their place in God's plan)
- Equipping disciples (how people are trained for ministries)
- Deploying servants (how people are sent into the world and supported by the church)

Formal:

- Property (location, facility, and technology)
- Finance (stewardship, budget, and debt-management)
- Communications (information, marketing, and advertising)

Each question is coded to observe chains of positive habits or destructive addictions in the congregational culture that influence the ability for congregational renewal and

change. The positive habits are called the Seven Cardinal Virtues and the destructive addictions are called the Seven Deadly Sins. The degree of addiction or health experienced by a congregation is not a quantifiable science, rather based on observation as recorded on the surveys and the congregational data. *Kicking Habits: Welcome Relief for Addicted Churches* and *Moving Off the Map: A Field Guide to Changing Your Congregations* are additional books authored by Tom Bandy that provide the basis for a transformation process.

Highly Effective Church Inventory

Source: This paper survey was developed by George Barna and is based on the *Habits of Highly Effective Churches* (Issachar Resources, 1998); book (\$15.00) and audio CD (\$12.00). They are available directly from the Barna Research Group; www.barna.org or call 1-800-55-BARNA.

Cost: \$5.00 for five copies of the inventory

Time: The inventory takes approximately 45 minutes to complete and a team could compile inventories in a matter of a few days. Discussion and unpacking the results could take months.

Administration: The self-administered inventory with 120 questions is given to key leaders and lay leaders. The inventory could be administered to the entire membership also.

Purpose: This is a simple, self-administered survey that church leaders can complete to evaluate how the habits of their church compare to the habits of the nation's most effective churches. Effective is defined by Barna as those churches that consistently and measurably facilitate changed lives among the people associated with those churches. The inventory, which focuses on 12 specific attributes, is simple but not simplistic: it challenges the user to take an honest assessment of what they are doing in ministry, why they are doing it, and how well they are doing it. This is a tool to use with staff and lay leaders to get everyone on the same page, to spark focused discussion, and to move past list-making to strategic change.

Assessment areas:

- Pastoral leadership
- Lay leadership
- Structure and organization
- Worship
- Systematic faith development
- Evangelism
- Holistic stewardship
- Serving others
- Prayer
- Accountability
- Interpersonal relationships among believers
- Ministry to families

Missional Church Culture Assessment

Source: Milfred Minatrea author of *Shaped by God's Heart*, Jossey- Bass, San Francisco, CA, 2004. This book is based on an extensive field study of 200 churches and identifies nine common practices that characterize missional churches.

Cost: \$13.00 for the book. Web-based survey is free.

Time: The questionnaires can be completed in a short period of time while unpacking the results will take longer.

Administration: A Ministry Team or a specially identified team can administer the questionnaires. The answers of the questionnaires are predominately to create dialogue.

Purpose: A missional church is not about programs, but rather is a distinct church culture. Churches, like any organism, adopt and are influenced by culture. Culture can be identified by observing behaviors. In fact, culture is the set of underlying values that drive our behavior. We act like we do, because we believe what we do. The only way to evaluate culture is through analyzing actions. The assessment questions are at the end of each chapter of the book or available at www.missional.org. This tool gauges responses to statements about the behaviors of a church in order to provide a framework for dialogue concerning the compatibility of the church with a missional culture as defined by Minatrea.

Assessment areas: The practice or behaviors that are assessed fall into these areas:

1. High threshold for membership
2. Be real, not real religious
3. Teach to obey rather than know
4. Rewrite worship each week
5. Live apostolically
6. Expect to change the world
7. Order action according to purpose
8. Measure growth by capacity to release, not retain
9. Place Kingdom concerns first

The assessment results are a tool for discussion and planning.

Natural Church Development (NCD)

Source: Christian Swartz, who originated in Germany, developed a global model. NCD has now become well accepted by many within the United States with over 20,000 congregations from various denominations having used the tool. The Institute for Natural Church Development has conducted extensive worldwide research to discern what makes churches healthy, and from this research has formed a strategy proven to increase the health of churches.

Cost: \$200 per survey (Coaching agreement negotiated with Eastern Mennonite Missions)

Time involved: The initial survey including preparation time takes 3-5 months; discernment and working with the results are cyclical and on-going.

Administration: The NCD survey is administered by an NCD Consultant to 30 congregational leaders on how the church is doing in numerous areas. Results of the survey then provide church leadership the opportunity to see important “big picture” needs for growth. A church group forms to analyze the information, create a plan to address these needs (beginning with the weakest characteristic), and implement the plan.

Purpose: Natural Church Development is a research- based system of understanding congregational life that correlates healthy congregational life with congregational growth.

NCD studied congregations around the world in a variety of contexts. The goal was to discern common areas of congregational life that crossed all racial, ethnic, and contextual lines. The outcome of the research showed that how congregations functioned in these areas could be correlated to effective outreach and congregational growth patterns. NCD suggests that if church growth is about an organism, the health (quality) of the organism is going to have a direct impact on its size (quantity). If a church can become increasingly healthy over time, it is more likely and better able to reproduce disciples, ministries, and eventually itself.

The survey: Using an assessment tool that surveys the pastor and 30 key leaders of the congregation, a profile is generated for each quality characteristic. This profile is then compared with a standardized profile curve that helps generate assessment scores for the congregation. The NCD survey, which is taken once every cycle, provides an accurate up-to-date “snapshot” of the health of the church. Each survey enables the church leadership to assess improvement in the church's health over the previous cycle and focus on the area needing greatest attention.

Assessment areas: The eight quality characteristics assessed through the NCD survey are:

1. *Empowering* leadership
2. *Gifts oriented* ministry
3. *Passionate* spirituality
4. *Effective* (functional) structures

5. *Inspiring* worship
6. *Need-oriented* (contextual) evangelism
7. *Holistic* small groups
8. *Loving* relationships

The key to these quality characteristics is the adjective (in italics in the list above). The noun identifies the arena of ministry but the adjective describes that aspect which makes the characteristic function in life-giving and capacity increasing ways.

Natural Church Development story (A story from The Village Chapel)

In 2000, the Village Chapel Pastoral Team, consisting of four bi-vocational pastors, heard about Natural Church Development at a District Leaders Meeting. There they met Antonio Ulloa, of Eastern Mennonite Missions, who serves as a Natural Church Development coach for North American congregations. Natural Church Development is a cyclical process that helps congregations grow in eight areas, or “quality characteristics” of healthy churches discovered by German theologian Christian Schwarz and his team in a study of more than 1000 churches all over the world: Empowering Leadership, Gift-based Ministry, Passionate Spirituality, Effective Structures, Inspiring Worship Service, Holistic Small Groups, Need-oriented Evangelism, and Loving Relationships.

“We were looking for ways to bump us to the next step,” says Lead Pastor, Jeff Horst, describing the Village Chapel congregation and leaders. “At that meeting, we sensed an excitement that NCD might be the tool to accomplish that boost.”

NCD appealed to the bi-vocational leaders because they could proceed at their own pace. The process was adaptable to each congregation and it was not a formula. Although the NCD process would require immense effort, this would be targeted to only one particular area of need per cycle. And finally, Antonio, an NCD coach, was available to walk with them for support and encouragement.

The congregation has completed the NCD survey—which is taken at the beginning and end of each cycle—on three occasions since 2000. Pastor Dave Musselman recalls that the very first time there was some trepidation on receiving the results. “You discover some things about yourself as a congregation you would rather not know. But after the initial reaction, we recognized that the survey scores accurately described us.”

As a result of this first survey, two areas were identified as needing attention: Effective Structures and Empowering Leadership. A sub-group studied the decision-making process and the congregational dynamics until they uncovered the core barriers in those particular areas. “Coach Antonio keeps pushing us to identify the core barriers, not the easy or peripheral stuff,” says Pastor Lester Gehman. “The result after much study and development,” says Pastor Jeff, “is a leadership structure and a decision-making process that keeps Christ in the center and releases service and ministry groups in the congregation. They do not have to ask permission each step along the way.”

Village Chapel's second NCD survey showed that not only had the scores of the two targeted areas dramatically increased, but each of the other six areas had improved. Their target area for analysis and planning after the second survey in 2003 was holistic small groups. Then in 2007, the third survey again showed increase in scores for all the eight quality characteristics. They are currently working with the area of Inspiring Worship Service.

“When you are in the midst of ministry and leadership, one is sometimes blinded to the areas of ministry that need to be shored up to be more effective and faithful to God’s calling. An outside set of eyes through the survey doesn’t provide the answers or solve your problems, but it sure helps to identify an area of focus for the congregation and leaders,” says Dave.

When asked what advice he would give to pastors and congregations considering the Natural Church Development process, Pastor Jeff responded, “Be open, be patient, and as a leader, be willing to lay down everything.”

Written by Alonna Gautsche Sprunger

Resource people: NCD consultation is available through Eastern Mennonite Missions to any of its constituent churches. If you are interested in receiving more information, please contact Antonio Ulloa, EMM Coordinator for Church Consultation: 717-898-2251 or Antoniou@emm.org.

Spiritual Strategic Journey

Source: Spiritual Strategic Journey was created by George Bullard, church consultant and coach. He has written about this process in a book, *Pursuing the Full Kingdom Potential of Your Congregation* (Lake Hickory Resources, St Louis, Missouri, 2005). It is also available as a web resource in a Tutorial for Congregational Redevelopment by George Bullard (web Resource on the Alban Institute Congregational Resources site: www.albaninstitute.org).

Cost: On-line tutorial is free; book is \$19.00.

Time: 2 years for the entire process; however, parts of the process can be used for assessment and conversation.

Administration: A team of 4-7 leaders

Purpose: George Bullard wrote a free on-line tutorial to help congregations understand congregational development and redevelopment in creative and effective ways. Two tools within the larger congregational redevelopment resource are *The Life Stages of a Congregation* and *Congregational Issues for Generative Dialogue*.

The *Life Stages of a Congregation* is a tool that can help leadership teams assess which life stage best describes their congregation. Bullard has defined the following Life Stages: Gestation and New Birth, Infancy, Childhood, Adolescence, Adulthood, Maturity, Empty Nest, Retirement, Old Age, and Death. The resource describes the alignment of vision, relationships, management and programs at each life stage. The tool gives some guidance with beginning places of intervention and a redevelopment path based upon each life stage. The resource also includes notes for Congregational Coaches.

Congregational Issues for Generative Dialogue is a set of ten questions posed as a beginning point for dialogue. These questions help to determine a congregation's readiness for transition, transformation, and change. Those congregations with an average score of 55 on all the items have a readiness for the Spiritual Journey. They are the congregations able to openly and vigorously engage by affirming their strengths and building on them. They also gauge readiness for Spiritual Strategic Journey to discover and live into their full Kingdom Potential. Those congregations that average a score of 40 or less on all ten issues combined do not have the readiness for a Strategic Spiritual Journey. George Bullard writes that 60 percent of congregations do not currently have the readiness and vitality to successfully engage in a spiritual strategic journey and need intervention that produces readiness. Bullard's coaching notes are helpful in sorting out the level of motivation and readiness for congregational change.

Resource Person: Church Ministries Staff, Lancaster Mennonite Conference

Vital Signs of a Healthy Church

Source: This small resource was compiled by Jack Jones while he worked as Director of Evangelism at the Minnesota-Wisconsin Baptist Convention. Jones uses some resources from George Bullard. It is available in PDF form from Lancaster Mennonite Conference.

Cost: Cost of printing the resource

Administration: These assessment/scorecards can be administered to a group of church leaders or the entire congregation. Additional voices help formulate a more accurate picture of the present condition of the church and give direction to the action steps that need to be done. The individual scorecards will need to be collected and compiled. The resource contains some information that will assist in developing a strategic plan based on the scores.

Assessment areas: Based on Acts 2:42-47

- Worship
- Evangelism
- Discipleship
- Ministry
- Fellowship
- Stewardship
- Unity
- Leadership
- Missions
- Prayer

Appendix

APPENDIX A

Lancaster Mennonite Conference *Toward A Common Understanding of the Missional Church*

INTRODUCTION

We speak from many perspectives about the missional church. This is not surprising because missional church development continues to be defined and refined. One conference staff member refers to it as “holy chaos.” However, even though our understanding continues to be shaped and formed, it is helpful to agree upon certain key points of missional thought. This is a work in progress. Read it. Give feedback. Memorize those portions that are helpful. But do not take it too seriously. In the event that Christ returns while you are studying this document, be careful, it will self-destruct within thirty seconds!

BIBLICAL

I. Mission Begins with God (*mission Dei*)

- a. The mission of God to restore and heal creation is the central Biblical theme. Mission is the result of God’s initiative. We must think and speak of God as a missionary God.
- b. God created this world. God is in control and humanity is not! (Genesis 1; Psalm 24)
- c. Through sinful acts separation occurred between God and humanity. From the very beginning of time God has been in the business of reconciling and restoring the world. (Genesis 7, 15; 2 Corinthians 5:19)
- d. The New Testament affirms that God is in mission through Jesus Christ. (Mark 1:16-20; John 3:16-17)
- e. Mission is at the heart of God. “This is where we always start, with the person who is the message and the messenger, the Savior and the Lord, Jesus Christ.” (Guder, *Missional Church*, p. 5)

II. The Church is Called to Proclaim the Good News

- a. God’s purposes are the church’s purposes. We do not create our own reason for existence. The primary purpose of the church is to embrace the call of Christ to carry out the Great Commission in all areas of life. (Matthew 4:19, 28:16-20)
- b. We are called to be agents of reconciliation in a broken world. Because of God’s love for us and our love for God we are motivated to participate in this work. (2 Corinthians 5:20)
- c. *God calls us to be followers of Jesus Christ and, by the power of the Holy Spirit, to grow as communities of grace, joy, and peace, so that God’s healing and hope flow through us to the world.* (MC USA, *Vision: Healing and Hope*)

III. Jesus Sends the Church into the World

- a. The church is sent to proclaim the Good News of the reign of God at home, across the street and around the world. (Acts 1:8)
- b. The intent of the church is not to become a huddled community. It is called to be Christ’s presence in the world, speaking with power, love and self-discipline. (2 Timothy 1:7)
- c. We are the body of Christ sent on a mission. We are all called and all sent to use our gifts for God’s mission wherever that might be in this world. (Matthew 25:14-30)

- d. Baptism is the commissioning of a person for Christian mission. (Luke 3-4; John 20:19-23)
- e. Jesus is our model for mission – He told parables (Mark 4:1-34); fed hungry people (Mark 6:30-44); sat and talked with children and adults (Mark 10:13-16); healed people (Mark 5:21-43). Jesus nurtured a healthy spirituality and set boundaries for his life (Mark 6:31-32). Jesus was confrontational (Mark 5:1-20) and tender (Mark 5:21-43) in his ministry.
- f. Jesus is with us in the world – and prays for us! (John 17)

IV. The Role of the Holy Spirit in Community Life

- a. The Holy Spirit creates a bold, risk-taking community that is ready to die for the cause of Christ’s message. (John 20:19-23; Acts 1-2)
- b. The Holy Spirit gives us power to proclaim the word in boldness, to love enemies, to suffer in hope, to remain faithful in trials, and to rejoice in everything. As we walk by the Spirit, the Spirit produces the fruit of love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, and self-control (Galatians 5:22-23). (*Confession of Faith in a Mennonite Perspective*, p.19)
- c. The role of the Holy Spirit within the life of the Christian community is vital to how we discern our life together. (1 Corinthians 12:12-13)
- d. How we treat one another within the Christian community will be vitally important to God’s mission in this world.
- e. Each follower has a role to play within God’s mission in this world. (Romans 12, 1 Corinthians 12, Ephesians 4)

V. The Life of the Church is Guided by Missional Intentions

- a. Followers of Jesus are in the business of doing God’s mission here on this earth. We are called and sent to do God’s mission, not the mission of a key leader or a body of believers. (Luke 10:1-12)
- b. A missional church does not focus so much on how to get people into the church as it looks at how to send people out of the church and into the world. This is a call to move from being a huddled, frightened group of disciples to a Spirit-empowered, formidable movement that seeks to impact the world in which it lives.
- c. Our call is not only to ask what Jesus would do but to get on board with how and where Christ is working in the world.

VI. The Church Engages its Culture

- a. The missional church is in the world but not of the world. (John 18:36)
- b. Jesus uses striking images (e.g. salt and light) to clarify the role of the church in the midst of the prevailing culture. We are not only called to be different from the culture in which we live. We are called to make a difference. (Matthew 5:13-16)
- c. As followers of Jesus Christ we are to embrace the teaching and lifestyle of Jesus as we discover its essence in the gospels. To be a missional church is to carry out the ministry of Jesus in today’s world. (Matthew 9:35-38)
- d. The challenge faced by the church today is not centered on being “in the world.” The struggle today is understanding and not being “of the world.” We are to be a contrast community of faith. (1 Peter 2:9; Romans 12:1-2)
- e. The church is sent into the world so that the world may be “sanctified” (holy). To be holy is to be different. (John 17:19)

January 19, 2006

APPENDIX B

Habits of Thriving Anabaptist, Missional Congregations (fruitful, effective, innovative, and vital) Living into God's Purposes Discussion Starter

Thriving Anabaptist, missional congregations have many of the following habits as part of their basic character and nature and are working to establish the additional habits. These congregations are able to point to observable patterns of behaviors that support the each habit. But just as important these congregations **have pastoral and other leaders that are assessing and fostering** continuing spiritual development and sustaining vibrancy (based on descriptions of vital congregations by George Bullard, *Missional Patterns from Treasures in Clay Jars* by the Gospel and Our Culture Network and Healthy Congregations from *Natural Church Development* by Christian Swartz).

1. Habits of Identity Formation

Thriving congregations know whose, who and why they are. They--

- Worship and celebrate God's redemption, restoration, reconciliation through Jesus Christ in small and large gatherings.
- Share a God-centered, biblical vision for their purpose of life together that is congruent with the Great Commandment and the Great Commission.
- Act boldly as a people called and sent by the Missionary God, dependent upon the guidance of the Holy Spirit.
- Are theologically grounded in Anabaptist understanding of identity and core values and translate these values to current 21st century life.
- **Congregational leaders lead the congregation in regularly asking and discerning: Whose are we? Who are we? Why do we exist? What do we value?**

2. Habits of Focus/ Intentionality

Thriving congregations make God's mission their priority. They---

- Discern and live out the congregation's particular calling
- Listen to and partner with neighbors to learn the culture and bring healing to human hurts and spiritual longings.
- Equip and mobilize each disciple to participate in God's mission.
- **Congregational leaders lead the congregation in regularly asking and discerning: Who are our neighbors? What is God doing around us and how is God calling and sending us to join in God's mission?**

3. Habits of Making Disciples and Deepening Spiritual Depth and Passion

Thriving congregations focus on helping all people be devoted disciples of Christ. They--

- Read God's Word together to learn God's good and gracious intent for all creation, the salvation mystery, loving Christ and receiving the kingdom of God.
- Teach and practice dependence on the Holy Spirit.
- Practice the spiritual disciplines of prayer, fasting and other disciplines

- Covenant together to grow in commitment and obedience to Christ. The fruit of the Spirit is increasingly evident in their lives.
- Increase the spiritual, emotional, physical, and relational well-being of disciples through holistic ministry.
- **Congregational leaders lead the congregation in regularly asking and discerning: Are we deepening our relationship with God? Are we maturing as sent disciples? Is there increasing evidence of the fruit of the Spirit in our lives and relationships with others?**

4. Habits of generously sharing the Gospel, gifts and resources

Thriving congregations and members practice self-sacrifice on behalf of others.

They--

- Extend mercy and justice, both locally and globally, even when it involves taking risks, suffering, or being treated unjustly for the sake of the Gospel.
- Proclaim and translate the Good News of Christ in words, action and being as they serve their communities.
- Help all members develop their God-given calling, passions, and gifts.
- Practice and receive hospitality, especially with the “stranger.”
- Partner with other congregations, conference, denomination and para-church systems, understanding that the kingdom of God is bigger than themselves.
- Tithe and give offerings as an act of worship and thanksgiving.
- **Congregational leaders lead the congregation in regularly asking and discerning: How are we releasing and using our God-given resources for God’s purposes?**

5. Habits of Loving Interpersonal Relationships

Thriving congregations practice compassion and reconciliation with one another and neighbors. They--

- Spend meaningful time together and with neighbors.
- Practice open disagreement without being disagreeable.
- Support reconciliation and healing of relationships.
- Seek to understand and value diversity of cultures and experiences.
- Are moving toward a more heterogeneous community-- in its race, ethnicity, age, gender and socio-economic composition.
- Teach and guide members through change and conflict transformation
- Risk and experiment in ministry and learn from mistakes.
- Identify unhealthy cultural norms and practice alternative healthy behaviors.
- **Congregational leaders lead the congregation in regularly asking and discerning: How do our relationships with each other and with our neighbors point to Christ and the reign of God?**

6. Habits of Multiplying Leaders and New Communities of Discipleship

Thriving congregations multiply, They--

- Expect and release their pastor(s) to primarily teach, equip members for ministry and develop emerging leaders and church planters.

- Identify, call, train, equip and commission emerging leaders to ministries.
- Are involved with church planting or forming new discipleship/worship communities as a part of the congregation's mission impulse.
- **Congregational leaders lead the congregation in regularly asking and discerning: Who, Where and How is God opening doors to multiply and embrace more people for Christ?**

7. Habits of Flexible Systems and Congregational Culture

Thriving congregations develop flexible structures that release and empower people and resources for the congregation's missional vocation. They--

- Champion the God-given creativity and fresh insights of new and younger believers, creating space for their involvement in discernment and decision-making.
- Streamline the decision-making process and establish a permission-giving culture, balanced with accountability.
- Unfreeze structures that are controlling and maintenance focused.
- **Congregational leaders lead the congregation in regularly asking and discerning: Are we organized in such a way that it serves God's mission?**

AGS 10/30/08

APPENDIX C

East Chestnut Street Mennonite Church story

How is the Spirit at work in your church? What is the current mood of your congregation? What are the concerns of both vocal and quiet congregants? These are the types of questions that the Pastor-Congregation Relations Committee (PCRC) at East Chestnut Street Mennonite Church wanted to find out.

The PCRC cares for the relationship between the congregation and the pastors. In relating to the pastors, the committee meets regularly with the pastors to discuss their workload, goals, and areas of growth and renewal. In relating to the congregation, the committee is available to congregants regarding leadership matters, hearing affirmations and concerns, testing congregants' perceptions, and dealing with any conflicts among/between pastors, congregants, and church leadership. The PCRC must also encourage and facilitate dialogue among members of the congregation, congregational leaders, and the pastors.

In order to fulfill these weighty mandates, the committee felt the need to find a way to get the pulse of the congregation. After some deliberation, the group decided to use a simple, five question on-line survey. The questions included:

- What is valued in your congregation?
- How do congregants see the Spirit at work in your church?
- What are the hopes and dreams for your church's future?
- What do members and regular attendees find significant about your pastors' ministries?
- What could your church be doing better?

This on-going survey is sent to seven or eight people a month. The idea being that, over the course of three years, everyone in the congregation will have the opportunity to share their thoughts. Those that do not have access to the internet are given a hard copy to fill out. If there is need for clarification of a participant's answer, the PCRC follows up the survey with a conversation with the congregant.

Just over a year into the process, the PCRC has found the survey highly effective in gleaning trends and issues within the church. Some of the material was used in both pastors' tri-annual evaluations while other relevant information will be passed along to the Church Board and respective committees. As congregants have become more familiar with this process, the response rate has become very high. And since people are polled every month, the PCRC is often aware of new issues, concerns, or trends within the congregation more quickly.

The PCRC plans to continue using this survey tool in the years ahead and hopes that the monthly input will become a beneficial tool for all three groups the committee works with: the congregation, leaders, and pastors.

Written by Peter Eash-Scott

APPENDIX D

Annotated Bibliography

Spiritual Growth/Maturity Assessment Tools

Samples available at the Congregational Resource Center
Lancaster Mennonite Conference

Barna Research Group. Personal Spiritual Inventory. Brochure. Ventura, CA, 2000.

This resource maybe purchased though Barna Research Group’s website www.barna.org in packages of 20 for \$20.00. The 50 questions (both quantitative and qualitative) in this inventory help assess spiritual health by examining behavior in seven core aspects of Christian life: Worship, Evangelism, Holistic Stewardship, Knowing What You Believe, Applying Your Faith, Serving Others, Relationships with Believers. In addition to personal assessment, the respondents are able to compare themselves to other believers by visiting Barna Research Group’s website. Respondents are encouraged to discuss their personal findings with an accountability partner, someone whom they trust and respect spiritually and who will help them grow more mature in faith.

Frazeo, Randy. The Christian Life Profile Assessment Tool Workbook. Grand Rapids, MI: Zondervan, 2005.

This comprehensive discipleship tool enables churches to assess 30 core Christian beliefs, practices, and virtues of each member to help everyone grow. The assessment is based on the “Thirty Core Competencies” as outlined in the book *The Connecting Church*, also by Pastor Randy Frazeo. These thirty core competencies help churches know when they are making progress in guiding their members toward Christ-likeness. Individuals answer 120 questions about their Christian beliefs, practices, and virtues. Three friends also assess them in the virtues area. Using the results, individuals identify areas in which they would like to grow during the upcoming year. The Christian Life Profile journey is experienced in a small group community that seeks to encourage, pray, and hold each other accountable for progress. The goal is to take the profile again, one year later, to monitor the journey. A Training and Teach Manual with DVD is also available as a package.

Hagberg, Janet, and Terry Donovan. Spiritual Life Inventory. Plymouth, MN: Personal Power Products, 1999.

The Spiritual Life Inventory complements the ideas and behaviors described in the authors’ book *Critical Journey*. In *Critical Journey*, they define seven stages of a person’s spiritual life that one repeats in an ever widening spiral as one experiences the breadth and depth of our spiritual lives. They are: Recognition of God, The Life of Discipleship, The Productive Life, The Journey Inward, The Wall, The Journey Outward, The Life of Love. The Inventory helps the person identify a “home stage” where one functions the majority of the time but also

gives insights to the journey of faith which gives space for questions, the dark nights of the soul, challenge and confusion along with other stages. The reading of the Critical Journey and a spiritual friend or director would be most helpful when using this tool. The tool is available at www.personalpowerproducts.com for \$5.95 and discounts for bulk orders.

Roehlkepartain, Eugene C., and Dorothy L. Williams. Exploring Faith Maturity: A Self-Study Guide for Adults. Minneapolis, MN: Search Institute, 1990.

This resource was developed through a comprehensive Search Institute study of 11,000 adults and youth in six U.S. denominations with major funding provided by the Lilly Endowment. The responses to the 38 questions in this assessment tool help to self-evaluate where one is on their faith journey. The questions are then grouped in 8 Marks of Faith for further study. The 8 Marks of Faith are: Trusting and Believing, Seeking Spiritual Growth, Integrating Faith and Life, Holding Life-affirming Values, Experiencing the Fruits of Faith, Nurturing Faith in Community, Advocating Social Change, Acting and Serving. This resource contains additional questions for reflection and discussion in small groups with instructions for leaders. The small booklet that contains the assessment tool and the descriptions of Marks of Faith is out of print and a copy is available at the Congregational Resource Center, Lancaster Mennonite Conference.

Rohrmayer, Gary. Your Spiritual Journey. Brochure. Lindenhurst, IL, 2005.

This is an excellent assessment tool (track) to help seekers and believers alike determine where they are spiritually and to show them ways to take the next steps on their spiritual journey. Used as a conversation starter this resource contains seven descriptions: Resisting, Questioning, Responding, Embracing, Adjusting, Stabilizing, Reproducing. In addition to helping place their journey on the continuum, the resource helps identify barriers to spiritual growth and what it will take to remove the barriers. This resource is available in Spanish and English at \$12.50 for 100 copies. The small brochures may be ordered at www.myjourney.org.

"Spiritual Growth Assessment." Central. Central Christian Church.
<http://cccocfcarmel.com/spiritualgrowthassessment.aspx>.

First, spiritual growth is most likely to occur when we are intentional about it. That's why the Elders of Central Christian churches created the Spiritual Growth Assessment and are recommending their members take the assessment and determine their next best steps to growth. The tool looks at the Fruit of Life as compared to The Character of Christ and the Priorities of Christ. The scores then correspond to seasons of spiritually: Sit, Stand, Walk or Run that have descriptions with ideas for growth. The participants create a personal spiritual growth plan. This is a free downloadable resource from their website.

"Spiritual Growth Assessment Process." [Lifeway.com/discipleship](http://www.lifeway.com/discipleship). 2006.

Lifeway.

http://www.lifeway.com/lwc/files/lwcf_pdf_dsc_spiritual_growth_assessment.pdf

This free downloadable resource created by Lifeway, the Baptist Church's denominational publisher, is a questionnaire that uses a Discipleship Wheel to help participants plot balance of spiritual life. The 60 questions assess six spiritual disciplines: Abide in Christ, Live in the Word, Pray in Faith, Fellowship with Believers, Witness to the World, and Minister to Others. The tool also includes a resource to enlist three people to give feedback as they observe life actions. Finally helps are provided to set goals and develop a spiritual growth plan.

APPENDIX E

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