

Vision & Strategy Assessment Pack

VISION & GOALS



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This Assessment Pack from BuildingChurchLeaders.com is a collection of tools to use with your leadership team. Each tool has been designed to help you and your team measure some dimension of ministry.

Here’s how to use your Building Church Leaders assessments with your board, committees, or staff:

- 1) Print and photocopy the assessment tool you’d like to use (you have permission to photocopy for church or educational use)
- 2) Hand it to your team to complete
- 3) Lead a discussion based on the team’s answers.

For more assessment packs, complete training themes, or other training tools for church leadership, see our website at www.BuildingChurchLeaders.com.

Are We Ready to Decide?

Find out with this influence indicator.

1 Corinthians 10:31–11:1; Numbers 14:1–9

Is your congregation ready to make a decision on a new building program, add staff, or change its worship focus? Here's a way to help determine that.

- ◆ **For every 100 people in your church, list five influential people.** Then mark each name with these influence-level indicators.

1 = low influence 2 = medium influence 3 = high influence

- ◆ **Estimate how each person will respond to the improvement you are recommending according to the following.**

1	2	3	4	5
Resist/ Sabotage the Idea	Discourage/ Not Support the Idea	Neutral/ Allow the Idea	Encourage/ Support the Idea	Drive/ Promote the Idea

- ◆ **Multiply each influencer's response estimate by the influence indicator.**

For example, Jane Doe is a high influencer (3 influence units), who might discourage a new idea (2 on the response scale). Her total influence value is 6.

John Smith is a low influencer (1 influence unit), who would encourage a new idea (4 on the response scale). His total influence value is 4.

Bill Farland is a medium influencer (2 influence units), who will drive a new idea (5 on the response scale). His total influence value is 10.

- ◆ **Add the totals.** By adding the three totals (6, 4, and 10), you get a sum of 20.
- ◆ **Divide the sum total by the number of influence units.** Divide 20 by 6, and you get a readiness average of 3.67.
- ◆ **Evaluate.** There are more factors that could be plugged into a formula for determining congregational readiness to make a decision, such as time required to make a change and leadership capacity, but this figure offers a rough estimate of how a new idea will go over in a church. Use the following scale to determine if it's time to push influencers—and the congregation—for a decision:
 - (0.4-1.5) *High Risk.* Plan on a bumpy ride if you push for change at this readiness level.
 - (1.6-2.9) *Careful.* The fruit is still green. Realize some may not make the transition.
 - (3.0-4.9) *Positive.* You should do well at this level. Make sure you do a thorough job in the transition as it could go either way, depending on the momentum created.
 - (5.0-20.9) *Optimum.* This level is prime for pursuing well-planned improvements. If you've picked the right strategy, success should follow.
 - (21.0-50.0) *Overly Ripe.* You have waited a bit too long to pursue improvements and have left some potential on the table. Proceed without hesitation. Next time, start sooner with improvements.

—Adapted from *How to Change Your Church (without killing it)*, Alan Nelson & Gene Appel, 2000, W Publishing Group, Nashville, Tennessee. All rights reserved.

Discuss

1. To whom did you go for advice when you had to make an important personal decision? Name some important influencers in your life.
2. What kind of advice does 1 Corinthians 10:31–11:1 offer to decision makers? How would you balance that with a situation like the one in Numbers 14:1–9?
3. How could we work with influencers in our church to decide whether to make a major change?

Are We Ready for Change?

Understanding our strengths, weaknesses, and opportunities.

Nehemiah 2:11–18

Life Cycle Audit

Every church is at some point on this life cycle (*see chart at right*). Our job is to decide where our church fits. Circle the number that corresponds to where you would place the church. Next, add all the numbers together and divide by the number of assessors. The result will be the group’s estimate of whether the church is growing, in a plateau, or declining.

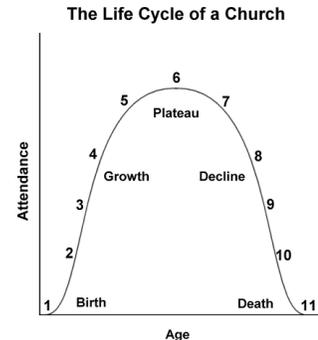
Performance Audit

This purpose of this audit is to assess our church’s strengths, weaknesses, and limitations. Some areas to consider in answering the following questions: the church’s property and facilities, location, convenience of location, ministries (worship, evangelism, preaching, teaching, Christian education), staff, attendance, commitment.

1. **Strengths:** What is our church particularly good at doing?
 Why do people attend our church?
 What qualities of the ministry set it off from other ministries in the community?

2. **Weaknesses:** Why do people leave our church? What reasons do visitors give for not coming back?
 What improvements could be made in the church staff?
 What programs are short in lay people and volunteers?

3. **Limitations:** What ministries are we attempting without a qualified leader?
 What ministries do we offer that we don’t have the talents, gifts, or abilities to do well?
 How do our facilities and/or community limit our ministries?



Overall Rating

In light of what our church is, what it’s doing, and what it could be doing, circle the number that best describes its performance:

High			Medium				Low			
10	9	8	7	6	5	4	3	2	1	

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Discuss

1. If the ministry is growing, do we know why? How close is it to a plateau? What could we change to keep growing?
2. If the ministry has plateaued, do we know why? How close is it to a decline? What could we do to start growing again?
3. If the ministry is declining, do we know why? What could be done to halt the decline?

The Angst of Change

Reasons why congregations resist numerical growth.

1 Corinthians 14:12–26

Most long-time members of a church find it more comfortable to attend a church that has plateaued in size or even gradually declined numerically than to participate in a fast-growing congregation. Some of the reasons they cite for doing that include:

	Affects us little			Affects us much	
	1	2	3	4	5
Stability. For people who find that every other facet of their life is complicated by unwanted change, it is good to find their congregation filled with stability and predictability. Consider the number of adults who have had their marriage end in divorce, or have been disappointed with their adult children, or have lost a job, or have had to change their residence. Where can they find stability? For many, the most promising possibility is church.	1	2	3	4	5
Continuity. There is much continuity in familiar faces, traditions, customs, and denominational events in a church that stays about the same size or is declining slightly in membership. Conversely, rapid numerical growth can bring a flood of strange faces, a trampling of local customs, remodeling or expansion of familiar spaces, an erosion of denominational ties, new worship practices, and a new generation of strangers who move into policy-making positions.	1	2	3	4	5
Giving Cycles. The typical pattern in rapidly growing congregations is a two-year lag between the membership or attendance curve and the income curve. Contributions usually match the financial needs of two years earlier. In the numerically shrinking congregation, that lag disappears. Frequently the decline in dollar receipts lags about two years behind the decline in average worship attendance, partly because long-term members may attend less frequently, but a combination of guilt, loyalty, habit, and stewardship means continued giving.	1	2	3	4	5
Complexity. Almost invariably, growth is accompanied by an increase in the level of complexity in a congregation. The vast majority of people prefer simplicity. Life in a numerically shrinking congregation usually is less complex than in a rapidly growing congregation.	1	2	3	4	5
Neglect. Since an increase in staff frequently lags behind an increase in membership, this often causes long-time members to believe they are being neglected. Gradual numerical decline is one way to offset this perception of neglect.	1	2	3	4	5
Commitment. High commitment tends to be more common in churches that are growing numerically, whereas churches that are shrinking numerically drift toward the low-commitment or low-expectation end of that spectrum. A decrease in the level of expectation for members can raise the comfort level.	1	2	3	4	5

—LYLE E. SCHALLER

Discuss

1. When you were personally moving through a time of change, what helped provide you with stability?
2. What might our congregation lose if it grew significantly? What would it gain?
3. Name some ways our congregation can remain sensitive to some of the fears people have about integrating a lot of new people into the church.

Do We Need to Change?

A 6-point church check-up.

1 Corinthians 10:23–32

Take a careful look at our church in these areas:

Our history. List the key events in the history of our congregation. Now do the following: Identify marker events that have significantly affected the direction of the church. Identify patterns that have shaped the character and values of the church. For example, look for attitudes toward debt, decisions about ministries with children or youth, and development of Bible study groups. Note how we have responded to change. Has the congregation resisted most efforts or pushed forward, trusting its leaders?

Our attendance, membership, and Sunday school. Use a graph to enter the last 20 years of statistics on church attendance, membership, and Sunday school. Then ask the following: What patterns does this show? What happened to prompt some of the changes? If these patterns continue, what will result in 10 years?

Our age profile. Use a graph to illustrate the age distribution of church members. Compare these statistics with those of 10 and 20 years ago, then ask the following: What are the dominant age groups in the congregation? What were the dominant groups 10 and 20 years ago? Is our congregation getting younger or older? What might we look like 10 years from now if things continue? How does the present age span compare to that of our surrounding community?

Our giving profile. Using a 20-year period, chart the offering dollars given (do not include tuition, investment income, bake sales, etc.) Then, distinguish what portions of those dollars were allocated for local ministries, capital improvements or debt retirement, and missions. What does this giving say about our mission priorities?

Our membership distribution. Take an area map and fasten it to a surface that will hold stick pins. Use three different colors of pins to represent: Member households under the age of 55, member households age 55 and above, and new members that have joined the church in the last five years.

Draw one-mile, three-mile, and five-mile radii from the church. Then take a look. Where do most of our members live? How far do new members drive to come to church? Are we really a neighborhood church, or is our mission field broader than that? What are we doing to reach people 20-30 miles away?

Our facilities. Discuss the condition, comfort level, and crowding of the worship area, education and fellowship areas, parking lots, offices, restrooms, and childcare facilities. If any of these are crowded enough to discourage strangers, we may need to expand.

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<http://www.bakerbooks.com>.

Discuss

1. Think of a major change you personally experienced in the past five years. What was your initial reaction to the thought of that change? What helped you get through it? Did it turn out to be a good thing?
2. How do you generally react to the idea of changes in the church? What helps you get through those?
3. In which of the above six areas are we the strongest? Which show the most need for change?

Price of Progress

3 questions to answer before starting a new ministry.

Galatians 1:10; 1 Kings 22:5

Wise planning considers all possible consequences of an action. Here are three cost questions to ask before beginning a new program. Apply them to a ministry you're considering.

1. Will this distract us from our primary mission? I came to Elmbrook Church fresh from ministry in Europe to countercultural youth. Shortly after my arrival, I discovered that 100 young people, most of whom had dropped out of organized religion, were meeting at the home of one of our members. When I met them, I learned they felt they were not welcome at church. I persuaded them to come one Sunday morning. When they showed up in blue jeans and T-shirts, the congregation reacted with consternation; many parents were concerned that their teenagers be kept separate from the perceived negative influences of these young people.

My vision, on the other hand, was to build a church that bridged the gaps between the disparate groups. How to reconcile the two?

This conflict could have been costly, but I was willing to pay the costs (potential lost members and lost credibility) to reach the alienated youth, who were central to my mission at Elmbrook. We eventually created a special Sunday school class to bring together adults and the countercultural adolescents. The class studied the Book of James together; the teaching responsibility was divided between one older and one younger person. The class was an immediate success.

How much would this new ministry distract us? A lot Some Not much

2. How much turmoil will this cause? Many years ago, as the church grew rapidly, we needed to create small-group opportunities. But people said they couldn't give another weekday evening in addition to Wednesday, the traditional evening for our prayer meeting. We looked at the numbers attending the Wednesday meeting, evaluated what they were doing, and decided to substitute small groups on Wednesday evening for this traditional service.

Some people who never attended the Wednesday evening service said, "We've always had a Wednesday evening service" and vowed to leave the church. Our groups have prospered, though, so much that six new churches have been born, thanks to them.

How much turmoil will this new ministry cause? A lot Some Not much

3. Whom are we choosing to lose? With every decision, we lose someone, either someone now in the church or someone who may have joined in the future. The question isn't whether we will lose people, but who.

When our church broadened our musical styles, we implicitly chose to lose those adamantly committed to traditional organ and hymns, although in fact few actually departed—a credit to their grace and the quality of our music ministry.

How comfortable do we feel about the people we will lose? Very Somewhat Not very

—D. STUART BRISCOE

Discuss

1. Is Paul's attitude in Galatians 1:10 applicable in church controversy about change? Why or why not?
2. Is it biblical to "choose to lose" some people? Why or why not?
3. Often people who resist change are seen as unspiritual or deadwood. How does our church treat people who resist change?

Pool of Support

5 categories to help identify the people you need.

Luke 5:1-11; Romans 12:11

Growth requires change, so churches need to know how individuals will respond to new initiatives. People tend to fall into one of five categories:

- 1. Innovators** (2 percent). Dreamers and visionaries, they are not often acknowledged as leaders or policy makers.
- 2. Early Adopters** (18 percent). Respected and influential, they know a good idea when they see it.
- 3. Middle Adopters** (60 percent). The majority, they react to ideas rather than generate their own. Inclined toward maintaining the status quo, they are more influenced by those opposing change.
- 4. Late Adopters** (18 percent). The last to endorse a new idea, they often speak against change. They may never verbally acknowledge acceptance of a new idea but will eventually go along if the majority supports it.
- 5. Never Adopters** (2 percent). They often sow discord after change is adopted and will eventually leave if they don't get a following.

You won't need to work hard to convince Innovators and Early Adopters of the value of your new idea. Late Adopters will not be convinced before the idea actually becomes reality. But if you can convince the majority of Middlers to support the initiative, you are on your way. Most Middlers prefer the known to the unknown. This does not mean Middlers are closed to reason or cannot catch the excitement of a new vision. But they tend to support the status quo unless given a good reason to change, or are assured that change will not result in a loss of quality. Earlies are generally well-respected. Their words are given serious consideration and their leadership is usually followed. Make a list of your Earlies, then solicit their active support. Ask them to endorse the new proposal in formal meetings and informal discussions. Explain that hallway conversations often influence Middle Adopter members more than anything else. And let them know that in committee meetings, their support may make the difference between failure and success.

—CHARLES ARN

The above categories are taken from *Diffusion of Innovations* by Everett M. Rogers.

Discuss

1. Who are the Middle Adopters in our congregation?
2. Which category does most of our leadership come from?
3. How are the Late Adopters and the Never Adopters shaping our discussion about change?

What Makes a Vision Effective

Why some work better than others.

1 Kings 3:7–9; Matthew 28:19–20

Successful visions seem to possess several characteristics:

1. Solid in core. People rightly get frustrated when the reason the church exists changes. Our church, for example, has this primary mission: “We will live the Great Commission” (Matt. 28:19–20). Although our church ministers to the poor through our food pantry, feeding the poor isn’t why we exist; we exist to reach the lost for Christ.

Ways to achieve the core mission may change, but the core mission needs to be set in concrete. A fixed mission is the church’s ballast during times of upheaval.

2. Flexible in execution. We use every means possible to interest unchurched people in the gospel. For example, sports are a good opportunity for Christians to interact with non-Christians. So our church even sponsors a men’s hockey team, which plays in one of Detroit’s city leagues.

A realistic vision allows for all sorts of creativity.

3. Appropriate to the local context. In the early 1980s, the development of “satellite churches” was being touted as a wave of the future. Under this model a church would operate as the hub of other churches it began nearby. Each campus would share staff and money with the main one.

So I traveled to various churches piloting satellite campuses and then convinced my leaders we needed to do the same. Suddenly, we had a vision. We planned to start four satellite campuses in various Detroit suburbs. Our timing seemed impeccable.

Unfortunately, to make a long and painful story short, we scrapped our vision—or, I should say, someone else’s vision. I had to learn what now seems obvious: you can’t necessarily import a vision created elsewhere. Vision is local.

—WAYNE POHL

Discuss

1. Is our church vision local? That is, is our vision specific to our community? What is an example that shows that?
2. How clearly is our vision communicated? How do members learn the vision of our church?
3. Which of the three characteristics described above would help us most?

Restructuring to Grow

4 signs a redesign may be necessary.

Acts 6:1-7; 1 Timothy 3

What are the signs a congregation should reassess its administrative design?

- 1. Rapid growth.** A congregation of 100 must be organized differently when it reaches 500.
- 2. Development of a multi-pastor staff.** If a congregation has pastoral leaders with no official access to governing boards, if lines of communication and decision-making don't clearly define staff pastors' roles, confusion will result.
- 3. Conflict between major boards or committees.** If the number of disagreements over administrative responsibility increases, a change may also be needed.
- 4. A clear gap between the formal and informal leadership.** Formal leaders are elected through some constitutional process, but church leaders may find themselves going more often to informal leaders for key decisions; the support of the unelected leaders is increasingly necessary for any venture to succeed. If this is the case, it's time to retool.

—GORDON MACDONALD

Discuss

1. Which of the above signs apply to our church?
2. What is the role of staff? What is the role of lay leaders? How does our administrative structure reflect those values?
3. What is the decision-making process in our church? What is one way we could improve that process?
4. What can we learn from the way the apostles restructured administration in Acts 6?