

Congregational Self-Study

Coach's Copy
(With Composite Scorecard)

**This study is intended
to allow a congregation to collect
information on its own health and
history which can then be understood
with the help of a trained coach.**

Congregational Self-Study

The staff and leaders should create this study and report. All of the data should be typed in Word and sent electronically to the coach. It is best to have the as many of the staff and board as possible involved in compiling this information and discussing it.

rev. 08-05

HISTORY AND DESCRIPTION

1. Write a brief history of your congregation (three to four pages). Include those events that contributed to periods of growth or decline in the number of people participating. Please write in a factual style. Avoid the temptation to puff the story for public relations and the temptation to inject personal commentary regarding past problems, simply describe the events without qualitative judgment.
2. Provide a list of all full and part-time program staff positions for the last twenty years, or from the beginning, if founded more recently. List schools and degrees for full-time program staff. Give the dates for people's tenure and state the real reason why staff left.
3. Provide a list of all people who oversee specific areas of service. List the number of positions for which they are responsible in their oversight. State whether these people are full-time, part-time, volunteer staff or lay leaders.
4. List dates and provide descriptions for any building construction, major renovation, land acquisition, or leasing of facilities. List the amount of acreage you own, lease, or rent, the square footage of building(s), and number of parking spaces (distinguishing between off-street and street parking).
5. Write a summary of your congregational structure including the individuals or groups who are responsible for program decisions, budgeting and financial oversight, buildings and grounds, and any other major interests of the congregation. List committees, task forces, program teams, etc. and explain how these relate to boards or councils. Provide a chart that reflects your current organizational structure.
6. List how the church has related to the state ministry in the past. Give the ways in which the state staff has been involved in the church and how those from the church have been involved with the state ministry.

DEMOGRAPHY

1. Prepare a chart and graph for each of the following items for each year over the last twenty years, or entire history if founded more recently.
 - a) Number of regular participants in the ministries of the church.
 - b) Average attendance of your weekly worship services
 - c) Number of Small groups/classes
 - d) Average weekly attendance of all your small groups and classes combined
 - e) Number of baptisms

2. Estimate the average age of the people participating in the various activities of your congregation. State how this was determined.
3. State the percentage of people who attend your worship services who also attend some small group such as a bible study, prayer group, class, support group, or service team. Count each individual only once.
4. Prepare a list of the number of regular participants who were involved:
 - Prior to 1960
 - From 1961-70
 - From 1971-80
 - From 1981-90
 - From 1991-2000
 - From 2000-present
5. List the total receipts and total expenditures for each of the last 20 years or for your entire history if founded more recently.
6. Without listing names, state the amount given by each of the top ten contributors of record in the last fiscal year. Total these amounts and state the percentage of giving this total represents in relation to total contributions.
7. State the same information for the second ten contributors of record.
8. State the total number of contributors to the congregation during the last fiscal year and the average amount given per contributor during the last fiscal year.
9. For the last 10 years, give the amount given to missions, state/national ministries and other outside ministries of the church.

COMMUNITY STUDY

1. Write a brief overview of the area and community in which the congregation is located or which the congregation serves.
2. This overview should include about one paragraph on each of the following features:
 - a) History
 - b) Population
 - c) Income levels (be specific with numbers/percentages within ranges)
 - d) Education levels (be specific within levels)
 - e) Social, ethnic and religious diversity (be specific with percentages within ethnicity)
 - f) Age distribution (be specific with percentages within age groupings)
 - g) Growth/decline trends
 - h) Retail development
 - i) Other characteristics you deem significant
3. Briefly describe the square mile that surrounds the primary location of the congregation using some of the same characteristics.

BELIEFS AND PRACTICES

1. List mission, vision and the core values as practiced by the congregation.
2. List other important commitments or practices that characterize the congregation (written or unwritten), such as:
 - a) Covenants or Codes of Conduct
 - b) Key Social Issues
 - c) Political Positions
 - d) Regular Activities
 - e) Significant Financial Commitments

DOCUMENTS

1. Please send one copy of this self-study in typed form one month prior to the coach's visit.
2. Please send copies of the following documents (if you have them):
 - a) Articles of Incorporation and Bylaws (or "Constitution")
 - b) Doctrinal statement
 - c) Last two annual reports
 - d) Last two annual budgets and financial statements
 - e) Sample bulletin and/or newsletter
 - f) Any policy statements
 - g) Other printed documents you deem helpful in providing insight into your congregation

SELF-STUDY GROUP

1. After the self-study information has been compiled, the board and staff need to discuss the following questions as a group and complete an exercise pertaining to congregational conditions before printing the results in final form. (In smaller congregations gather 20-30 influential people, whether in official positions or not, to fulfill this requirement).
2. Please include the general consensus on each of these discussion questions in the report. If general consensus cannot be reached, please state such. Be sure to give the date when this discussion took place and list those involved in this meeting.
 - a. What are the three greatest strengths of this congregation, listed in priority order?
 - b. What are the three most significant weaknesses of your church, listed in order of the greatest need first?
 - c. What three changes would you like to see made in your church, listed in priority order?
 - d. Do the leaders want this congregation to grow significantly?
 - e. Are the leaders willing to make the difficult decisions required for change and growth? How do you know this?
3. Ask the board and staff to complete the congregational conditions exercise supplied by the coach in order to determine where they perceive the congregation to be at this time. (This exercise is found on the next page). Please have each person fill this out without discussion with others. Collect them and have an individual tally up how many checked each box.

EXERCISE

Date: _____

INSTRUCTIONS: In each row, mark exactly two statements that best describe current conditions in your church.

ROW 1: Commitment to Mission and Purpose

- | | | | | |
|--|---|---|--|---|
| <input type="checkbox"/> Positive supportive attitude | <input type="checkbox"/> Strong sense of mission and purpose among every member | <input type="checkbox"/> High visibility and understanding of purpose and mission | <input type="checkbox"/> Lowering of members' understanding of purpose | <input type="checkbox"/> Purpose is lost |
| <input type="checkbox"/> Uncertainty of future demands | <input type="checkbox"/> High level of goal "ownership" | <input type="checkbox"/> Common purpose throughout ministries of the church | <input type="checkbox"/> New members do not sense church's purpose | <input type="checkbox"/> Mission not understood |
| <input type="checkbox"/> visionary leader with high commitment level | | | | |

ROW 2: Involvement of Membership

- | | | | | |
|---|--|--|---|--|
| <input type="checkbox"/> Mutual dependency requires everyone to be involved, or leave | <input type="checkbox"/> High percentage of individuals' time and identity committed to the church | <input type="checkbox"/> New members quickly find a place to become involved | <input type="checkbox"/> Members assume there are enough others to do the job | <input type="checkbox"/> Programs eliminated for lack of participation |
| <input type="checkbox"/> All members willing to work | <input type="checkbox"/> Volunteers easily found | <input type="checkbox"/> High level of enthusiasm among membership for participation | <input type="checkbox"/> More paid staff to "enhance" ministries | <input type="checkbox"/> Difficult to find volunteers |

ROW 3: Programs, Structures, and Organizations

- | | | | | |
|---|---|---|--|--|
| <input type="checkbox"/> Minimal organization | <input type="checkbox"/> Function of ministry determines form | <input type="checkbox"/> New programs created to respond to new needs | <input type="checkbox"/> Few, if any, new programs added | <input type="checkbox"/> Programs deleted for lack of funds |
| <input type="checkbox"/> Spontaneity in decision making | <input type="checkbox"/> Structure created in response to needs | <input type="checkbox"/> Delegation begins | <input type="checkbox"/> Forms of ministries begin to determine function | <input type="checkbox"/> Primary goal is preservation/survival |
| | <input type="checkbox"/> Traditions begin to form | <input type="checkbox"/> New roles and responsibilities created | <input type="checkbox"/> Structure creates needs rather than responds to needs | |

ROW 4: Attitude toward Change

- | | | | | |
|---|--|---|---|---|
| <input type="checkbox"/> Members are receptive | <input type="checkbox"/> Changes easily adopted and integrated | <input type="checkbox"/> New proposals given serious consideration | <input type="checkbox"/> Few changes proposed | <input type="checkbox"/> "We've never done it that way before" |
| <input type="checkbox"/> Quickly accomplished | <input type="checkbox"/> Suggested from all levels of membership | <input type="checkbox"/> Church leaders responsible for initiating and implementing | <input type="checkbox"/> Few changes considered that radically depart from status quo | <input type="checkbox"/> Rationalizations often made for why it can't be done |
| <input type="checkbox"/> Ownership is unanimous | | | | |

ROW 5: Morale and Self-Esteem

- | | | | | |
|--|---|---|---|---|
| <input type="checkbox"/> Morale is high | <input type="checkbox"/> Morale is higher | <input type="checkbox"/> Morale is highest | <input type="checkbox"/> Morale polarizes into groups of high and low | <input type="checkbox"/> Few have high morale |
| <input type="checkbox"/> Self-esteem is in the process of being formulated | <input type="checkbox"/> Self-esteem easily affected by circumstances and short-term successes/failures | <input type="checkbox"/> Self-esteem at its highest level | <input type="checkbox"/> Self-esteem develops uncertainties | <input type="checkbox"/> Frustration and/or despair by leaders in not knowing how to stop decline |
| | | <input type="checkbox"/> Confidence is contagious that goals can be reached | | <input type="checkbox"/> Self-esteem lowers |

Name: _____

Your Age: _____

Years Involved in this Church: _____

_____ Congregational _____ Leadership

COMPOSITE SCORING INSTRUCTIONS: Record the number of responses marked in each COLUMN. Chart the results to show a composite picture of where the group tends to see the church on the life-cycle.

LIFE-CYCLE OF CHURCHES

INITIAL STRUCTURING (Birth)	FORMAL ORGANIZATION (Growth)	MAXIMUM EFFICIENCY (Maturity)	INSTITUTIONALIZATION (Aging)	DISINTEGRATION (Dying)
ROW 1: Commitment to Mission and Purpose				
<input type="checkbox"/> Positive supportive attitude <input type="checkbox"/> Uncertainty of future demands <input type="checkbox"/> visionary leader with high commitment level	<input type="checkbox"/> Strong sense of mission and purpose among every member <input type="checkbox"/> High level of goal "ownership"	<input type="checkbox"/> High visibility and understanding of purpose and mission <input type="checkbox"/> Common purpose throughout ministries of the church	<input type="checkbox"/> Lowering of members' understanding of purpose <input type="checkbox"/> New members do not sense church's purpose	<input type="checkbox"/> Purpose is lost <input type="checkbox"/> Mission not understood
ROW 2: Involvement of Membership				
<input type="checkbox"/> Mutual dependency requires everyone to be involved, or leave <input type="checkbox"/> All members willing to work	<input type="checkbox"/> High percentage of individuals' time and identity committed to the church <input type="checkbox"/> Volunteers easily found	<input type="checkbox"/> New members quickly find a place to become involved <input type="checkbox"/> High level of enthusiasm among membership for participation	<input type="checkbox"/> Members assume there are enough others to do the job <input type="checkbox"/> More paid staff to "enhance" ministries	<input type="checkbox"/> Programs eliminated for lack of participation <input type="checkbox"/> Difficult to find volunteers
ROW 3: Programs, Structures, and Organizations				
<input type="checkbox"/> Minimal organization <input type="checkbox"/> Spontaneity in decision making	<input type="checkbox"/> Function of ministry determines form <input type="checkbox"/> Structure created in response to needs <input type="checkbox"/> Traditions begin to form	<input type="checkbox"/> New programs created to respond to new needs <input type="checkbox"/> Delegation begins <input type="checkbox"/> New roles and responsibilities created	<input type="checkbox"/> Few, if any, new programs added <input type="checkbox"/> Forms of ministries begin to determine function <input type="checkbox"/> Structure creates needs rather than responds to to needs	<input type="checkbox"/> Programs deleted for lack of funds <input type="checkbox"/> Primary goal is preservation/survival
ROW 4: Attitude toward Change				
<input type="checkbox"/> Members are receptive <input type="checkbox"/> Quickly accomplished <input type="checkbox"/> Ownership is unanimous	<input type="checkbox"/> Changes easily adopted and integrated <input type="checkbox"/> Suggested from all levels of membership	<input type="checkbox"/> New proposals given serious consideration <input type="checkbox"/> Church leaders responsible for initiating and implementing	<input type="checkbox"/> Few changes proposed <input type="checkbox"/> Few changes considered that radically depart from status quo	<input type="checkbox"/> "We've never done it that way before" <input type="checkbox"/> Rationalizations often made for why it can't be done
ROW 5: Morale and Self-Esteem				
<input type="checkbox"/> Morale is high <input type="checkbox"/> Self-esteem is in the process of being formulated	<input type="checkbox"/> Morale is higher <input type="checkbox"/> Self-esteem easily affected by circumstances and short-term successes/failures	<input type="checkbox"/> Morale is highest <input type="checkbox"/> Self-esteem at its highest level <input type="checkbox"/> Confidence is contagious that goals can be reached	<input type="checkbox"/> Morale polarizes into groups of high and low <input type="checkbox"/> Self-esteem develops uncertainties	<input type="checkbox"/> Few have high morale <input type="checkbox"/> Frustration and/or despair by leaders in not knowing how to stop decline <input type="checkbox"/> Self-esteem lowers
_____	_____	_____	_____	_____
TOTAL MARKED IN THIS COLUMN	TOTAL MARKED IN THIS COLUMN	TOTAL MARKED IN THIS COLUMN	TOTAL MARKED IN THIS COLUMN	TOTAL MARKED IN THIS COLUMN