



## Section Four: Resources



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## Assessment as a Spiritual Journey: A Reflection

All truth is God's truth. That God is loving and gracious, that  $e=mc^2$ , and that curious tendency of all children to giggle at peek-a-boo, all these are expressions of God's truth. The process of discovering God's truth, in any of its many forms, always has an element of revelation to it as if one were being shown something. Using the vernacular of our day, our own personal discoveries have the quality of "a light coming on." This is also the language used by Jesus as he describes the discovery of God's nature and purposes in the world. "He who follows me will not walk in darkness, but will have the light of life."

The process of discovering the perspectives, experiences, and aspirations of a church is also one of revelation and has the revelatory quality of moving from darkness into light. In response, it is not uncommon for people to speak of "a light coming on" in the experience as they come to understand aspects of the entire body that they could not possibly have known from the relatively small number of interactions that characterizes the day to day relationships in most organizations. This process of reality moving out of the shadows and into the light is a spiritual journey.

As a spiritual journey, it has all the elements one would expect. There are insights that evoke a liberating "aha" as connections are uncovered that were not intuitively obvious. Some aspects of the process tell us nothing new, but they express what we do know using language that enables us to get a firmer grasp. Sometimes the need for healing is revealed in the relational wounds that come to light, often painful and occasionally urgent. There are the common resistances that we all experience, the sense of inferiority or shame or fear that tempts us to retreat back into the perceived safety of the darkness. Finally, there is the concrete action that must root itself in the earth of any spiritual journey and express itself in fruit for the Kingdom of God.

The fulfillment of a spiritual journey ultimately hinges, not on the research design, but upon the spiritual practice that surrounds it. Without this spiritual practice, insights degenerate into trivia, wounds are probed but not healed, resistances harden into defensiveness and denial, and the promised new life fails to materialize as an incarnate reality. King David's greatest loss of life was not to an enemy but to his own inability to manage information and keep it disentangled from his own ego.

For these reasons, it is critical that an evidence-based discernment process be interwoven with a robust spiritual practice including prayer, reflection, confession, study, and worship. Because an assessment generates a symbolic narrative, that is, a corporate story told through the symbol of numbers, we must ponder several questions. How do we deal with our stories? While the individual contribution to the assessment is confidential, the corporate story will be quite public. How might the disclosure of our corporate story bring insight, healing, and renewal? In the past, how have we dealt with surprises, with things we thought were true but we discovered were not? In that same past, how have we dealt with our wounds, our resistances, and our tendency to intellectualize as an escape from change? How do we find access to the grace of God in this process of discovery so that our journey might be one expressive of Jesus, full of grace and truth?

## FAQs for CAT Interpreters

*Q Why is the report called Vital Signs*

A We call it *Vital Signs* to emphasize that this is an assessment of a church in distinction from a political poll, which determines how many people are for or against something.

*Q What is the purpose of the Vital Signs?*

A The purpose of the *Vital Signs* report is to help leaders make better decisions, in less time, with more confidence. We believe that leaders make better decisions when they have an ear to the entire congregation rather than a vocal few. When leaders have solid information, they can spend their time discerning God's call for their future rather than trying to guess where people are now. While much of the *Vital Signs* may not be a surprise to leaders, it will help give them confidence in making important decisions.

*Q What are the answers to the Notions exercise?*

A They are all false.

*Q On the Key Indicators page, what do solid positive, on the fence, and solid negative mean?*

A. *Solid Positive* is the percentage of respondents who either strongly agreed or agreed with the statement. *On the Fence* is the percentage of respondents who either tended to agree or tended to disagree. *Solid Negative* is the percentage of respondents who disagreed or strongly disagreed.

*Q How is the Attendance Trend calculated?*

A The Attendance Trend is calculated by subtracting the percentage of folks who are attending less from those who are attending more and dividing by 3 (years) to get an annual trend. Because the folks who are no longer at the church (due to relocating, death, or transfer) did not respond to the survey, you must subtract 3%-5% from that figure to accurately reflect the worship trend in the church.

*Q What are the Drivers of Satisfaction?*

A There are 50 evaluative questions in the *Congregation Assessment Tool*®. The drivers of satisfaction tell you which of those 50 questions appear to be the most important for respondents in how they feel overall about the church. The fact that a question is a driver of satisfaction does not tell you how well the church did on the question; it merely indicates that it is important. To discover how a church did on a particular question, refer to the Index that contains the data for that question later in the report.

*Q What are the Critical Success Factors?*

A A Critical Success Factor is identified by looking at how important a question is combined with how well a congregation scored on a particular question. If a question is very important *and* the church scored lower in the percentile rank, the question moves toward the top of the Critical Success Factor list. The scale at the top of the Critical Success Factors chart indicates how critical the issue is to the church. A score that is less

than 20 is not highly critical. A score over 40 indicates an issue that is highly critical and should be addressed as soon as possible.

*Q On the Priorities page, why are some things at the bottom of the list which are very important to our congregation?*

A These priorities are ranked based upon how much additional energy members want devoted to them. An item can be at the bottom of the list either because it is less important to respondents or because it is very important but being performed at a level of excellence people feel good about.

*Q How can we tell whether something is at the bottom of the list because it is unimportant or because it is important but already being done well?*

A You will need to have further conversations with your members. Remember! A survey is always the beginning of a conversation, not the end.

*Q What are Back Door and Front Door persons?*

A Back Door persons are those who indicate they are worshipping less than they were 3 years ago. Front Door persons indicate they are worshipping more.

*Q What is an Index?*

A An Index is a grouping of questions by theme.

*Q What is a Descriptive Index?*

A A Descriptive Index indicates a characteristic of a church without attaching a value to that characteristic. The *Vital Signs*® report does not value progressive over conservative, flexible over settled.

*Q Why are there no numbers (only labels) along the top of the Comparative Profile for the Descriptive Indices?*

A We only use labels (progressive vs. conservative, flexible vs. settled) to avoid any suggestion that one is preferred over another.

*Q What is a Performance Index?*

A A Performance Index is a grouping of questions in which it is clear that a higher score is preferred over a lower score. For example, a more hospitable church is preferred over a less hospitable one.

*Q What is the Comparative Profile?*

A The Comparative Profile compares your church's score on a question with other churches using the concept of a percentile rank. Your percentile rank tells you the percentage of churches in our database with a lower score than yours on the question. If you scored in the 60<sup>th</sup> percentile, you scored higher than 60% of the churches in the database.

*Q Why do some of the questions have an asterisk (\*) before them?*

A These are questions that are negatively worded relatively to the Index. A lower score is preferred.

*Q Why are some the bars missing in my Comparative Profile?*

A The bars are not missing. When the percentile rank is zero, no bar appears.

*Q I notice that we have a low percentile rank on some of our questions in the Spiritual Vitality Index even though we do not have any folks on the negative side of those questions. Why is that?*

A By their nature, churches are not places where a large number of respondents give negative indications regarding their spiritual experience. On those questions, it is how *robust* the score is on the positive side (strongly agree vs. agree or tend to agree) that makes the difference.

*Q On the financial page, how is the Percent of Household Income Given calculated?*

A We take the total church income (provided by you on the Church Data Form) and divide it by the number of households (also provided by you on the *Church Data Form*). That yields the average gift per household. We divide this by the average household income provided by the survey and convert it to a percentage.

*Q How shall we share the Vital Signs<sup>®</sup> report with our congregation?*

A Many churches find it helpful to develop a 1-2 page summary that can be distributed to the congregation. For those who want more information, place a notebook with the full *Vital Signs<sup>®</sup>* report in the church office or library.

*Q What if we have questions?*

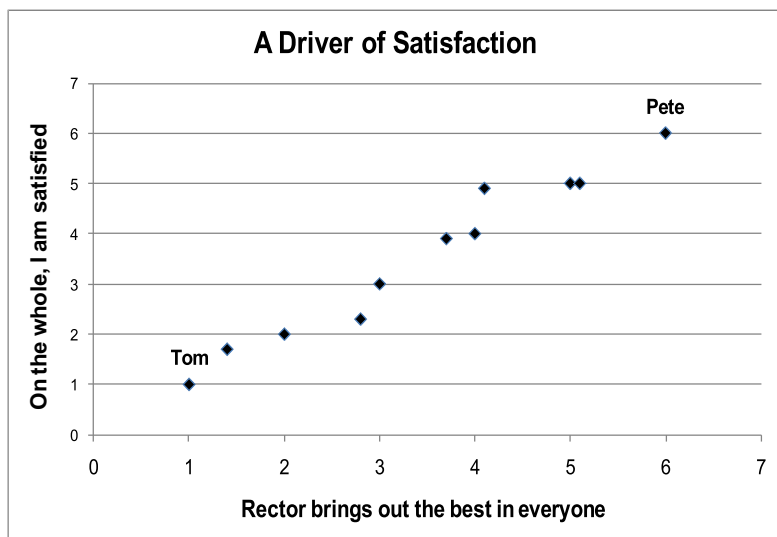
A Contact Holy Cow! Consulting at [office@holycowconsulting.com](mailto:office@holycowconsulting.com) or call (888) 546-4132.

## Explaining Drivers

When we look at the pattern of responses to the *Congregation Assessment Tool* from a particular church, we discover that not all questions are equally important. Some questions have a larger impact than others on how members are feeling about their overall church experience. These more important questions are called drivers. While it requires some effort to understand the concept of drivers, the benefits to the professional interpreter of *Vital Signs*® are significant. Drivers transform *Vital Signs* from a simple photograph to an x-ray revealing deep and important patterns.

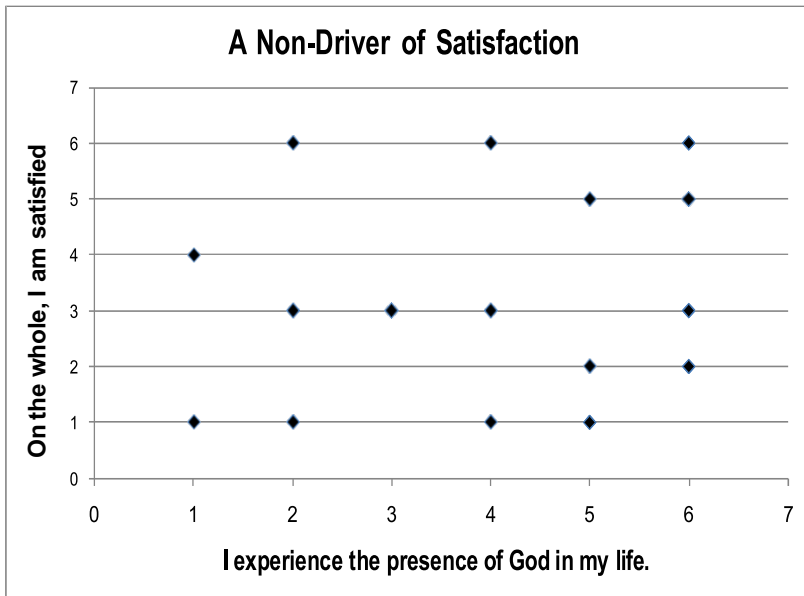
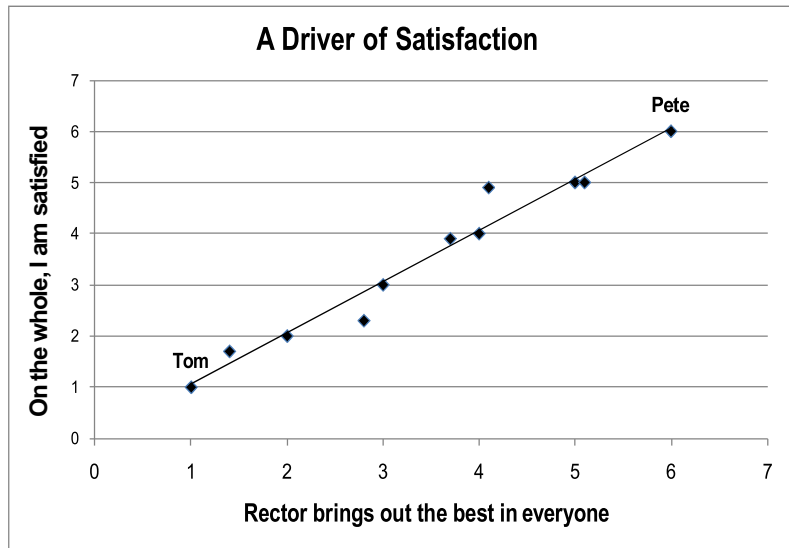
The question that measures how people are feeling about the church overall is Question #41: “*On the whole, I am satisfied with how things in our church.*” Ideally, all the members would feel positive and enthusiastic about the life and ministry of the church they belong to. In reality, we discover that some persons are clearly positive, some are clearly negative, and some are in between or “on the fence.” Drivers give us clues about what changes might help those who are feeling negative or on the fence to feel more positive about their overall church experience.

The graph to the right shows us the kind of pattern that is characteristic of a driver. The driver is Question #27, “*Our Pastor helps us accomplish our mission by bringing out the best in everyone.*” Each point on the graph represents a different person’s response. The vertical axis indicates his/her response to the overall satisfaction question, “*On the whole I am satisfied with how things are in our church.*” The horizontal axis indicates his/her response to the driver question, “*Our Pastor helps us accomplish our mission by bringing out the best in everyone.*”



The graph to the left illustrates the responses of two of the members to the *Congregation Assessment Tool* on these questions. Tom, in the lower right, gave a “1” (strongly disagreed) to the statement “*Our Pastor brings out the best in everyone.*” Tom also gave a “1” (strongly disagreed) to the statement “*On the whole, I am satisfied with things in the church.*” Pete, on the other end of the graph gave a “6” (strongly agreed) to the statement “*Our Pastor brings out the best in everyone.*” He also gave a “6” (strongly agreed) to the statement “*On the whole, I am satisfied with things in the church.*” All the other responses lie in between these two.

It is not difficult to see a pattern in the member responses to these two questions. In fact, one could draw a straight line that approximates the relationship between responses to the Pastor question, and responses to the overall satisfaction question. In this particular church you could reliably predict how members feel about the church overall by knowing whether they believed the Pastor brought out the best in everyone...or not. The more positive a member feels about the work of the Pastor in this area, the more positive he or she feel about the church overall.



By way of contrast, look at the graph to the left. The layout of the graph is exactly the same except that the question we are examining is Question #9: "I experience the presence of God in my life." Note that that there is no discernable pattern in how members respond to this question and their overall satisfaction. We cannot reliably predict how someone feels overall about the church from how they experience the presence of God in their lives. That makes Question #10 a non- driver. From the standpoint of church dynamics this means that the question about the Pastor is more important than the question about how a person experiences God.

Some questions fall in between these two extremes. The *importance* of a driver is a measure of the degree of relatedness between it and the overall satisfaction. The higher the importance of the driver, the more significant it is to how people feel about the church overall. The levels of importance are very high, high, moderate, low, very low, and noise.

Drivers are important for several reasons.

1. **Drivers suggest areas where making changes may have the biggest impact.** There are many knobs and buttons in a car. But only when you locate the accelerator pedal do you discover what makes the car go faster. Using this metaphor, a driver is the accelerator pedal in moving people toward a more positive evaluation of their church.



2. **Conversely, non-drivers are areas in which changes will make little difference in how members evaluate their church overall.** Helping folks experience the presence of God in their lives may be important for them, but it won't make any difference in how they feel about the church if it is a non-driver.
3. **In churches with low conflict management scores, drivers reliably indicate what the conflict is about.** Knowing this can suggest areas where further conversation and exploration might be helpful. In churches with low conflict management scores and several drivers around the work of the Pastor, it is likely the conflict has become focused on him or her.
4. **Drivers indicate what is on the minds of members.** This is critical information for the start-up of a new Pastor. Making sure that he or she begins to touch on the issues revealed in the drivers can spell the difference between a strong start and a weaker one.

Sometimes there are a number of drivers that address different aspects of the same issue. These are called *driver themes*. For example, driver themes can include areas like governance, worship, or attitudes toward change. When three of the five top drivers concern the work of the Pastor, the church is likely to be clergy-focused. In a clergy-focused church, members tend to gauge how they feel about the church overall almost totally on how they evaluate the work of the Pastor. In a power-focused church, members tend to gauge how they feel about the church overall on how they feel about those in governance positions. In a ministry-focused church members are more focused on the life and ministry of the church itself and the drivers tend to focus on these areas as well.

Improvement in a driver area can go one of two directions. One approach to improving a driver area is to *improve performance*. For example, if music is a strong driver of satisfaction, an improvement in the music ministry can have a significant impact on how members feel about the church overall. The second approach is to *shift expectations*. Members of a clergy focused church, for example, might begin to feel more positive about the church overall if they begin to focus more on the ministries of the church and less on the work of the Pastor.

Drivers of energy are calculated in exactly the same way except the focus is on Question #6: "*It seems to me that we are just going through the motions of church activity. There isn't much excitement about it among our members.*"

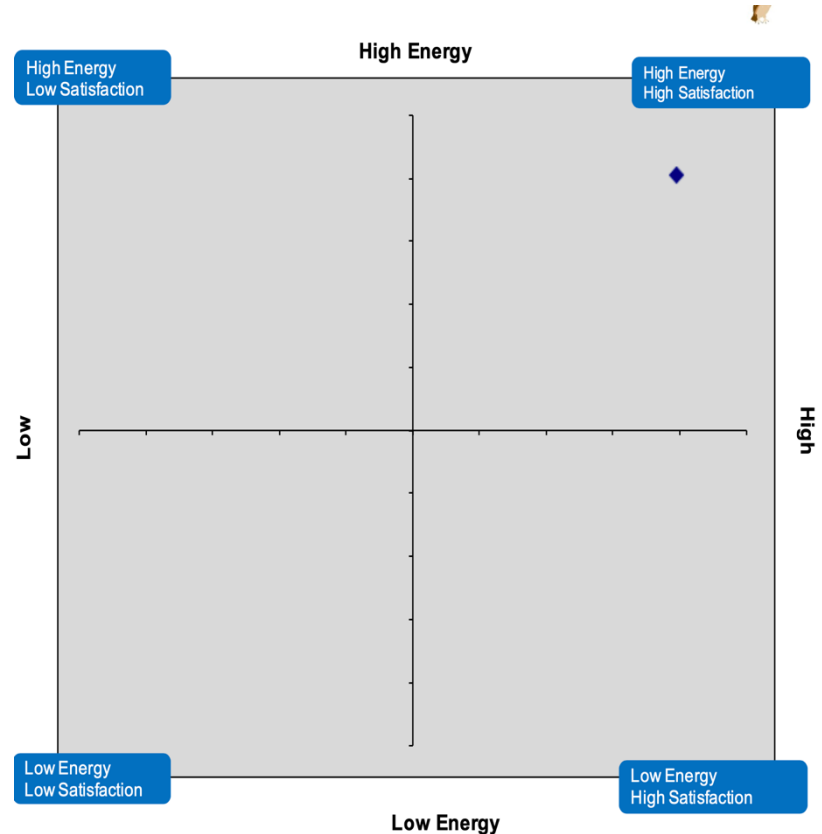
## FAQs about the Satisfaction and Energy Map

Q *What is the Satisfaction-Energy Map?*

A The *Satisfaction-Energy Map* plots the location of a particular church on a grid where the level of overall satisfaction (operational approval) is indicated on the horizontal axis and the level of overall energy (excitement) is indicated on the vertical axis.

Q *What is the significance of the Satisfaction-Energy Map?*

A The levels of satisfaction and energy have been found to be reliable indicators of the health and vitality of a church. Churches with high levels of satisfaction and energy demonstrate signs of health and vitality. Churches with low levels of satisfaction and energy do not demonstrate these same signs to the same degree, if at all.



Q *What precisely are the signs of health and vitality that high satisfaction and energy indicate?*

A. It is impossible to predict the precise ways that vitality will express itself through a particular congregation. The more tangible expressions include an external focus, a distinctive mission, and an influx of people who bear witness to transformation. The more intangible expressions might be described as a corporate spiritual zest, encounter-driven, inspired worship, healthy, healing, meaningful relationships, purposeful activity in the world, a sense of being “at the right place at the right time” both individually and corporately, and a nearly palpable atmosphere of well-being about the grounds.

Q *Shouldn't we be measuring whether a church is bearing fruit for the Kingdom rather than how satisfied or excited they are about the church?*

A A healthy, vital church, like a healthy, vital individual has many options for expressing itself in the world which cannot be fully anticipated and therefore cannot be reliably benchmarked. How fruit for the Kingdom may appear in any particular church varies according to community context, theological perspective, and the gift mix of the people. Similar to an individual, as the vitality and health of a church are diminished, so are its options for expression. Healthy, vital churches produce fruit that varies from community to community. Demoralized churches tend to look the same.

Q *Doesn't a focus on the experience of members lead to a consumer culture?*

A Satisfaction and energy are like happiness: neither is achieved by trying to get more of them. They are by-products of other activities. Vital, healthy churches are generally aware of this. The fruit of the Spirit is not achieved by direct efforts to acquire it but by focusing on formation of one's life around the person of Jesus. The fact that we are measuring vitality through satisfaction and energy does not mean that a church can acquire these by merely seeking them. A gas gauge is not a gas tank. It can tell us when we are running on empty but not where the nearest gas station is located.

Q *Isn't it possible that some churches that are simply self-focused will score high on satisfaction and energy?*

A It is possible that some might, but to assume this is generally true does a disservice to those churches that have actually found a pathway to authentic vitality. It also encourages a culture that actually penalizes and marginalizes effective churches. This, we believe is the greater risk. In the parable of the wheat and the tares Jesus warns us that any evaluative methodology that renders us chronically obsessed with "bad seed" will inevitably destroy the "good seed" as well. The suspicion that every high satisfaction-high energy church is simply self-focused is not only refuted by the research, it plays into the shadows of human envy and competition. Even in the worst case, a church that is enthusiastically self-focused always has the possibility of a repentance which will redirect its focus and re-channel its resources. But a church that has shed most of its members and resources over years because it is chronically demoralized and unhappy sooner or later falls below a threshold of recovery.

Q *At a time in the history of the planet when human survival is in serious question, shouldn't people be feeling dissatisfied and somber?*

A This belongs to the list of confused messages that denominational leaders have been giving congregations for years. In the face of inexorable numerical declines, leaders were often quoted as saying that the church was not becoming smaller, it was becoming more committed, that what was lacking in quantity was exceeded by the quality of corporate life. But now that the research is bearing out that only about half of the members in a typical church are clearly satisfied and a full third agree that they are just going through the motions of church activity, it is difficult to sustain the appeal to the quality of church experience. At its core, this is a theological issue. The message of the Gospel has never been grounded in a favorable set of historical circumstances.

Q *I don't see the language in the Satisfaction-Energy model that I am looking for. Where does this fit in with missional churches, emerging churches, contemporary/traditional/blended churches, or evangelical/liberal churches?*

A The *Satisfaction-Energy Map*<sup>®</sup> is a metric of health and vitality. Again, a church does not achieve health and vitality except as a by-product of other activities that it must discern as the leading of the Holy Spirit. The shape of this discipleship can take many forms which the *Satisfaction-Energy Map*<sup>®</sup>

does not prescribe. The information from an assessment is no substitute for the prayer, study, experimentation, and conversation that is part of a faithful discernment process. What the Map can do is reliably indicate whether a particular course of action is moving a church toward greater health...or not.

Q *Doesn't a focus on the Satisfaction-Energy model end up favoring large churches over smaller ones?*

A Smaller churches are just as likely to have high levels of satisfaction and energy as larger churches. The exceptions are very small churches that have fallen below the threshold of viability. Generally, a definition of vitality that is focused on the experience of members and not simply on the number of members is going to recognize the important contributions that smaller churches make to the work of the Kingdom.

Q *Isn't it further demoralizing for a church to be told it is low on satisfaction and energy?*

A Growth in self-awareness is never easy for either individuals or churches. The Apostle Paul distinguishes a "worldly sorrow" from a Godly repentance. The same information that leads one church to despair and hopelessness opens another to the potential for change and growth. To shield a church or a regional association from this kind of information is, in the words of Dietrich Bonhoeffer, a cruel mercy. Or, in the words of Proverbs, "Faithful are the wounds of a friend, profuse are the kisses of an enemy."

## Clergy-Focused Congregations

In the interpretation of your *Vital Signs*® report, it may have been suggested that your church is clergy-focused. It is important to understand what this means.

From a technical standpoint, a church is considered to be clergy-focused if three of the five drivers of satisfaction are focused on some aspect of the work of the clergy or rector. This suggests that how people feel about the church *overall* is strongly dependent upon their evaluation of the work of the clergy. Those who evaluate the work of the clergy more positively are much more likely to be satisfied with the church overall. Those who are less positive about the work of the clergy are much more likely to be less satisfied with the church *overall*.

While it may seem inevitable that a church will view itself primarily through the performance of its clergy, this is not the case for all churches. In some churches, how people feel about the church overall is more strongly impacted by their evaluations of the decision-making process, the quality of the music ministry, or the comprehensiveness of the education program. In a clergy-focused church, the conversations about how the church is doing will often focus on some aspect of the clergy's work.

It is important to be clear on this point: the suggestion that a church is clergy-focused tells us nothing about whether the respondents feel positive or negative about the work of the clergy. To use an analogy, the statement "there is a strong relationship between how cold it is outside and how many clothes people tend to wear," while true, tells us nothing about the current temperature. It could be thirty degrees below zero with people wearing five layers of clothing. Or it could be a hundred degrees with people donning their swimsuits. In a clergy-focused church, members may feel very appreciative about the work of the clergy, or, conversely, very disappointed.

It is equally important to understand that the suggestion that a church is clergy-focused does not necessarily mean that the clergy person is expected to do everything. However, it is possible that the emotional reward system in the church will tend to ignore what the church as a Body is doing well or not so well in favor of a focus on what the clergy is doing well...or not so well. The result is that the clergy person often ends up doing everything because the system is so focused on the clergy that there is little incentive for lay people to do anything. The system ends up praising or complaining about the clergy no matter what else is done. Sometimes people are inadvertently crippled by the competence of their leader in a clergy-focused church because no one can do it as well as him or her.

Whether people feel the church is doing well or struggling, there is usually a significant amount of anxiety in a clergy-focused church. If things are going well, people worry about the clergy leaving and the clergy person feels the burden of the church's success. If things are not going well, people tend to focus their frustration on the clergy and the clergy person feels this burden as well.

This is not to say that a clergy-focused culture is always negative. In large churches where the leader has a strong public presence expressed through the media in a television, radio, or internet ministry, it is nearly inevitable that people will focus on the church as an expression of the leader's personality. These *icon cultures* can have significant, behind-the-scene ministries that are fueled by the leader's persona. Every church must discern its own calling through a clear recognition of the potential benefits and risks of a clergy-focused culture.

## Power-Focused Congregations

In the interpretation of your *Vital Signs*® report, it may have been suggested that your church is power-focused. It is important to understand what this means.

From a technical standpoint, a church is considered to be power-focused if the drivers meet the following three criteria:

1. There are at least two questions regarding the work of the Pastor/Rector
2. There are at least two questions from the Governance Index.
3. The importance levels of the drivers are rated *high* or very *high*.

This suggests that how people feel about the church *overall* is strongly dependent upon their evaluation of the performance of those who exercise power and whether those in power are representative of their views. Those who evaluate the work of those who are in power more positively are much more likely to be satisfied with the church overall. Those who are less positive about the work of those who are in power are likely to be less satisfied with the church *overall*.

In addition, the members' evaluation of those in power tends to spill over into the appreciation of every other aspect of the ministry of the church. It is not unusual in power-focused churches for those who view the governance positively to have dashboard scores above the 90<sup>th</sup> percentile in areas such as hospitality, education, readiness for ministry, and worship. Conversely, those who view the governance negatively tend to have dashboard scores below the 10<sup>th</sup> percentile in the very same areas. This suggests that some members of the church have become so focused on the issue of power and control that everything in the church is viewed through that issue. The difficulty in power-focused churches is that even the most robust ministries in areas such as worship, music, education, mission, and hospitality will not change how members feel about the church overall.

It is important to be clear on this point: the suggestion that a church is power-focused tells us nothing about whether the respondents feel positive or negative about the work of the leadership overall. To use an analogy, the statement "there is a strong relationship between how cold it is outside and how many clothes people tend to wear," while true, tells us nothing about the current temperature. It could be thirty degrees below zero with people wearing five layers of clothing. Or it could be a hundred degrees with people donning their swimsuits. In a power-focused church, members may feel very appreciative about the decision-making of the leadership, or, conversely, very disappointed.

It is equally important to understand that the suggestion that a church is power-focused does not mean that the church leadership is exercising power inappropriately. It indicates that members of the church tend to view everything in the church through the lens of power and control. This tendency is usually imbedded in a church culture and requires consistent steps over a period of time to change it. But unless these changes are made, the ministries of the church will ultimately suffer because energy is diverted from ministry to dealing with conflict.

## Critical Success Factors

We know from the study of drivers that not all questions in the *Vital Signs* report are of equal importance. These more important questions are called drivers. There are drivers of satisfaction and drivers of energy. The higher the importance of the driver, the more significant the question as it relates to overall satisfaction and energy in the church. The levels of importance are very high, high, moderate, low, very low, and noise. This is not to say that other questions do not provide us with valuable information about some aspect of a member's experience, for example, their personal commitment to live out their faith. But non-driver questions have a much lower impact on how people feel about the church overall.

Because drivers have a large impact on the overall satisfaction and perceived energy level in the church, it is more important that a church score better on these questions than on other non-driver questions. For example, if the educational ministry of the church is a very strong driver of satisfaction, it is more important that the church score better in the education index than it might be for it to score well on the question of the Pastor working with lay persons to plan and lead worship. Using the analogy of preparing a car for a family vacation, it is more important to the success of the trip that the engine run well than it is that the car be waxed or that the CD player work.

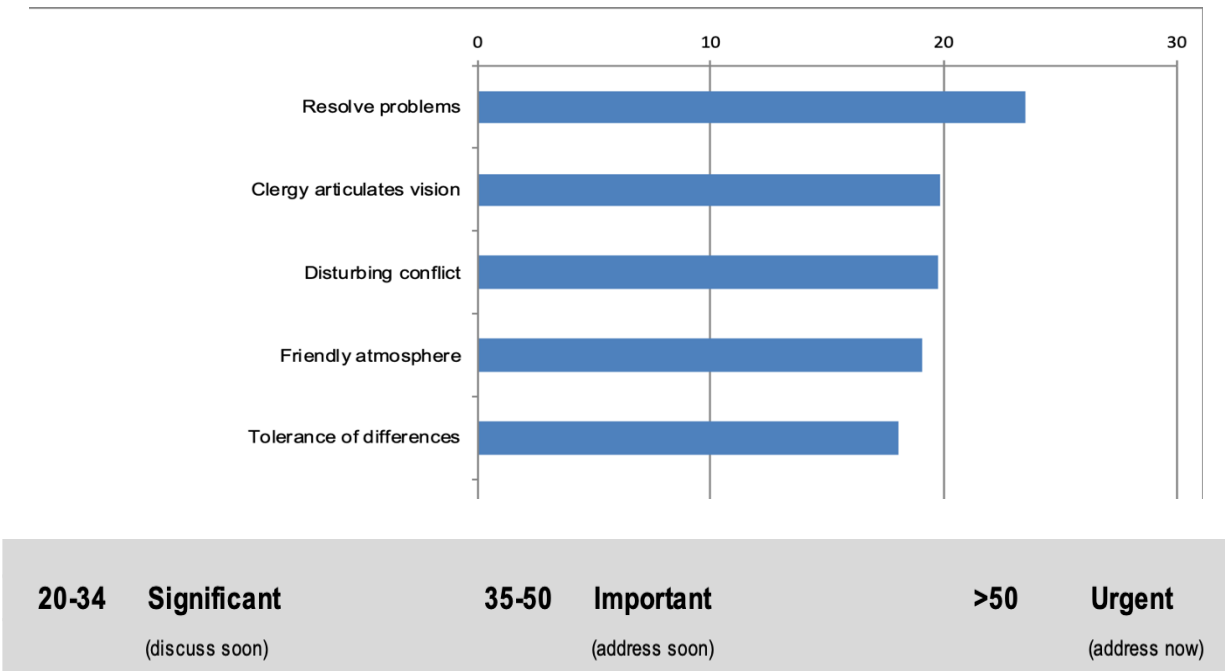
When a church does not score well on a question that is a strong driver (and therefore very important) it becomes critical to recognize and address that issue. We call these important questions critical success factors. For a question to be a critical success factor it must meet two criteria.

1. *It must be a driver of moderate importance or higher.* Note: Because the drivers listed in your *Vital Signs* report are only the top five drivers, other drivers of slightly lower intensity may not appear. For this reason, some of a church's more important critical success factors may not appear on the drivers page.
2. *It must be a question on which the church received a lower percentile rank on the comparative profile.* Note: Because some churches have higher overall scores on the indices in their *Vital Signs*® report, their critical success factors will have *lower* percentile ranks compared to their other questions but not necessarily *low* percentile rank scores.

You can get an idea of what the critical success factors might be in a church by going through their performance indices and identifying the questions that have lower percentile ranks. Then turn back to the drivers page to see if any of the low-scoring questions you identified are also listed among the top drivers. If a lower scoring question is also a driver, it meets the two criteria above; it is a critical success factor. Now you could identify many of the critical success factors by this laborious process of flipping back and forth between the different pages of the *Vital Signs*® report. We have saved you that effort by creating a page with the critical success



factors listed in rank order with the most significant factors listed at the top. The length of the bar to the right of the factor indicates its level of significance. A portion of the critical success factor page is found in the example below.



It is not necessary to understand how the numbers across the top of the chart are calculated. However, it is important to know that they represent the level of urgency in addressing the factor. Critical success factors with a score over 50 are *urgent* and need to be addressed *now*. It is likely that the church is in crisis and immediate steps need to be taken. Factors with a score of 35 to 50 are *important* and need to be addressed *soon*. It is likely that these factors represent issues in the church that need to be addressed soon. Factors with a score of 20 to 35 are *significant* and need to be discussed *soon*. They represent areas of probable concern that call for additional exploration and conversation. Factors with a score of 10 to 20 are rated *low*. There are possibly issues that need to be explored but there is no urgency about them. Factors with a score under 10 are *insignificant*.

The value of the critical success factor page is that it helps the interpreter prioritize what to focus on in the report. Items near the top of the list are more urgent in nature and will likely trigger conversation when they are identified. Knowing the level of urgency in these factors can also guide the church leadership in assessing its need for external resources. When a church has one or more critical success factors at the urgent level it is likely that it will need additional help to deal with those issues. Delaying action on these critical issues can further weaken the church to the point that recovery becomes long and painful.

In planning efforts, it is not only important to know what is near the top of the list, but also what is near the bottom. Questions near the bottom of the list are *non-critical factors*. They represent areas where the investment of additional energy is likely to have little effect on how the church is doing overall. By knowing what the non-critical factors are, leaders can avoid focusing resources in areas that may have little benefit overall and can save its efforts for those areas more likely to bear fruit.

## **The Use of Critical Success Factors in Planning**

Critical Success Factors should be considered priorities in any planning process. The higher their level urgency, the higher the need to make those areas a priority. If the Vital Signs Report indicates a fairly healthy system overall, then the Critical Success Factors can be discussed in combination with the items on the *Priorities* page of the report. In some cases it will be important to address the critical success factors prior to addressing other potential goals. For example, a church with goals related to growth may want to postpone major efforts in those directions until it has addressed critical success factors at the urgent level. If it does not, it risks bringing new members into a situation in which they also will become disillusioned and troubled, but without the resources of history and commitment to deal with it.

Critical success factors should also be taken into account when searching for new leadership. Leaders should have motivated abilities that are a good fit to dealing with those factors. When critical success factors are at urgent or important levels, search committees may want to frame questions probing the candidates experience in dealing with those issues. The inability of a leader to deal effectively with critical success factors in a church may sabotage a leader's good work in other areas.

Critical success factors can also be important information for the interim leadership of churches in transition. When remedial action can be taken to address critical success factors during a transition it prepares the way for the next Pastor. When difficult decisions are unavoidable, it is better to make those difficult decisions during an interim period rather than allow them to accumulate for the next leader to deal with.

Churches with all critical success factors at the level of insignificant or weak are likely to be exceptionally vital and strong. It is important that these churches understand their indicated strength as a stewardship. Such stewardship can take many forms but inevitably it requires assuming additional risks for the sake of purposes discerned through prayer and reflection. As we learn from the parable of the talents, assets we bury in an effort to preserve them have a way of suddenly disappearing without having accomplished anything of significance.

## Descriptive Mapping

Churches have distinct cultures comprised by a set of ideas, a vocabulary, core values, and the rewards and penalties used to reinforce these values. Two aspects of that culture are captured in the Descriptive Map of the *Vital Signs*® report: theological perspective and flexibility.

Over the years our experience suggests that churches in each of the four quadrants generated by this indicator have distinct characteristics. While every church has elements of each quadrant, there tends to be a dominant pattern that relates more to one quadrant than the other three. Exploring this pattern can be useful to churches engaged in strategic planning or preparing for a search process.

To assist in this exploration we have created a typology of the four church types:

1. **Progressive-Adaptable** churches which we have designated *Magi Cultures*.
2. **Progressive-Settled** churches which we have designated *Paraclete Cultures*.
3. **Conservative-Adaptable** churches which we have designated *Performance Cultures*.
4. **Conservative-Settled** churches which we have designated *Hearth and Home Cultures*.

In the pages that follow, these types are described in terms of their strengths, potential vulnerabilities, and opportunities for growth. This is intended to facilitate the beginning of a conversation, not the end.

The purpose of these typologies is to assist leaders in the following:

1. Clarify core values of a congregation related to theology and style.
2. Explore whether strengths have been fully developed and identify opportunities for further development.
3. Understand how the vulnerabilities inherent in their type may be hampering vitality and growth.
4. Discuss whether efforts to develop and grow in other quadrants might be beneficial.

For example, a church with a *paraclete culture* may discover that it is being overwhelmed by needs it is not prepared to meet. This may require that it more fully develop its strengths through gift identification, training, and resource generation. But it may also need to develop the *performance* side of its work by placing more emphasis on personal responsibility, accountability, and achieving excellence. The goal is not to turn it into a *performing culture* but to make it a stronger *paraclete culture* with long term sustainability. Discoveries such as these can be helpful as they inform search and planning committees.

For churches that are on or near a line, the typology may be less helpful. Certainly time and energy should not be invested in nailing down precisely what the church is. However, it is often the case that churches are bi-modal with worshipping congregations in distinctly different quadrants. Working with each of these cultures and helping them identify the benefits and vulnerabilities that each brings to the table can lead in fruitful directions.

# Descriptive Map Typology

## MAGI CULTURE

Progressive-Adaptive

### Strengths:

Analytical  
Open to different views  
Intellectually curious  
Advocates  
Inclusive

### Shadow:

Over-thinks issues  
Avoids emotion  
Tries to be everything to everyone  
Lack of interpersonal skills

## PERFORMANCE CULTURE

Conservative-Adaptive

### Strengths:

Impactful messaging  
External focus on community needs  
Powerful worship experiences  
Bridges traditional understandings with contemporary life

### Shadow:

Lack of substance  
Overlooks congregational relationship building  
Hypocritical  
Makes change that is not sustainable or aligned

## PARACLETE CULTURE

Progressive-Settled

### Strengths:

Inclusive  
Healing  
Accepting  
Spiritual practice that unites  
Driven to ministry

### Shadow:

Overcommits easily  
Goes through routines  
Burn-out  
Lack of accountability in behavior  
Internally focused

## HEARTH AND HOME CULTURE

Conservative-Settled

### Strengths:

Structure and stability in faith  
Dependable  
Deep love for each other  
Biblical clarity  
Strong spiritual vitality

### Shadow:

Guardian over things that are not relevant  
Conflict-avoidant  
Losses missional focus easily  
Focuses on concrete things

# Strategic Planning: Descriptive Map Typology

## MAGI CULTURE

Progressive-Adaptive

- Need to be able to create a clear vision or purpose statement rather than an immediate “to do” list
- Need to look at how to engage in deep spiritual practices that apply to day-to-day life
- Focus on hospitality must be included
- Questions that have to be answered:
  - When does intellectual exploration becomes intellectualism, that is, a defense mechanism to avoid painful emotions?
  - At what point does advocacy become a distraction from intrapersonal and interpersonal relationships?

## PERFORMANCE CULTURE

Conservative-Adaptive

- Need to systematically create opportunities to build relationships within the congregation
- Incorporate grace and empathy into spiritual learning
- Build a way to make decisions around change that aligns with the purpose/mission of the congregation
- Question that has to be answered:
  - At what point does the desire to reach the community result in a loss of connection with each other within the congregation?

## PARACLETE CULTURE

Progressive-Settled

- Build a capacity to align all mission/ministry work with a clear mission/vision
- Articulate a path for spiritual development that is both meaningful and incorporated into relationship building
- Questions that have to be answered:
  - Where does our desire to be inclusive to everyone diffuse our mission and lead to unachievable and mis-aligned work?
  - When does unconditional acceptance sacrifice the accountability required for personal and organizational growth?

## HEARTH AND HOME CULTURE

Conservative-Settled

- Systematically address the need for conflict management skills in leadership and congregation
- Adopt a bless and add strategy, incorporating new ideas and change to current programming when possible
- Ministry must be based on a biblical call to action
- Questions that have to be answered:
  - At what point does a commitment to a particular tradition become a barrier to new people who cannot understand it?
  - At what point does standing up for one's beliefs become divisive and disruptive?
  - What is the church's history related to conflict?

# Clergy Needs: Descriptive Map Typology

## **MAGI CULTURE**

Progressive-Adaptive

- Strong preacher and teacher
- Can relate intellectually to the congregation
- Able to engage people emotionally to encourage safe vulnerable spaces together
- Can develop the capacity of telling faith stories in a way that feels natural and invitation
- Someone who further ministry rooted in justice and systematic change

## **PERFORMANCE CULTURE**

Conservative-Adaptive

- Dynamic person who can connect with the congregation through worship
- Has good community connections or solid networking abilities
- Good leadership development skills
- Experienced in overseeing quality education programming
- Can help the congregation deepen their care and relationships with each other

## **PARACLETE CULTURE**

Progressive-Settled

- Good at missional alignment and clarity
- Has experience or training in assessing effectiveness of programming and ministries
- Can help people feel comfortable sharing their faith stories while deepening their spiritual walk
- Committed to the work of shifting culture from internal to external focus

## **HEARTH AND HOME CULTURE**

Conservative-Settled

- System will want pastoral care but they will also need strategic leadership
- Gregarious person
- Someone good at story-telling and making people feel connected
- Understands family systems extremely well

## Hearth and Home Culture

Hearth and Home cultures are ultimately concerned with a clearly defined faith that is lived out in a community with structure and stability. At their best, these cultures serve as guardians of hard won understandings and time-honored traditions which offer a measure of shelter from the frenetic pace of change in the world. In their outreach to others, they not only invite them into faith, but also to come home with all the expectations and rewards of a family. It is common in Hearth and Home cultures to hear folks talk about issues from a Biblical perspective that is more literally interpreted and to call members back to the foundations of the faith.

Members of Hearth and Home cultures appreciate the unchangeable nature of the message they proclaim and live. The clarity provided by their faith is readily translated into guidelines for living and transferable from one situation to another. The line between right and wrong is usually bright and readily articulated. They are often deeply engaged in the study of Scripture through individual devotions, small group Bible studies, and educational classes which tend to engage members directly in the Biblical text. Where a clear Biblical mandate is perceived, members of Hearth and Home cultures provide services to those in need, often with remarkable tenacity and perseverance.

Persons in Hearth and Home cultures tend to understand that the call to faith is the call to come home in many different senses of the word. It is a call to return to a Biblical faith or a faith best articulated at a point in the past. In more liturgical traditions, it may be a call to return to a previous style of worship, prayer book, or hymn book. Because Hearth and home cultures often see themselves as a family, straying members are called to come back to the family where they will be welcomed with open arms and ready forgiveness. Efforts to remove inactive adult children from the church roll are often seen as a kind of abandonment.

Even an annual visit to the church at Christmas “counts”. In more evangelical churches, issues are more focused around personal faith and conversion. Still, members are expected to become engaged with the “family” whether that takes the form of a small group or active participation in the single cell of a family-sized congregation.

The biblical themes that are resonant with Hearth and Home cultures include those of home, homeland, families and children, the cycles of birth, confirmation, conversion, marriage, family, and a faithful death. Hearth and Home cultures often value the regulation of behavior articulated in the ten commandments. In addition, Hearth and Home cultures may have other sourcebooks that are important such as ecclesiastical regulations, confessional documents, or worship standards.

Because Hearth and Home cultures understand themselves as guardians of traditional understandings and practices, the positions they take may leave them open to the charge that they are simply resistant to change. Their tendency to focus on the concrete side of matters may lead to inordinate attachments to facilities and furnishings. If they lose their missional focus they may retreat into a fortress mentality and find themselves becoming a diminishing, aging congregation.

If Hearth and Home cultures do not adequately explore the intellectual side of their faith, including the relationship of their tradition to contemporary issues, they may find that they are increasingly detached from the world they live in. In addition, the drive for spiritual and moral clarity on core issues may manifest itself in a lack of tolerance with one another making them vulnerable to demoralizing conflicts. Unless some amount of change can be embraced, returning sons and daughters will not encounter the loving father but a house full of elder brothers...or a house with no one in it at all.

## Paraclete Culture

Paraclete cultures are ultimately concerned with the development of communities that are intellectually open and reflective, but with attention paid to the importance of structure and ritual. At their best, this is accomplished through openness to those with different theological and spiritual perspectives combined with structures and practices that provide the external stability necessary for those seeking to develop and grow. A warm and hospitable community can make the church a potential haven for those in need of healing or recovery. It is common in paraclete cultures to hear folks talk about hospitality, inclusiveness, and spiritual practice. While many members are clearly grounded in their own theological perspectives, Paraclete cultures tend to be less demanding of a particular understanding of the faith, but more clear about the benefits of a particular liturgical tradition.

Persons in Paraclete cultures are comfortable with the unique spiritual path that each individual must follow but they also believe that they have discovered important patterns of spiritual practice. They may focus on methods for identifying strengths, temperaments, preferences, or ability patterns of those in their community. In addition, they may be articulate regarding stages of spiritual and emotional development.

Paraclete cultures are uniquely equipped to focus on ministries of healing. Their openness can make them comfortable dealing with various expressions of human brokenness and the emotional/spiritual consequences of life's misfortunes. In a compassionate response to suffering, Paraclete cultures may develop counseling centers, spiritual direction, homeless shelters, food pantries, support groups, and recovery services. What is distinctive about Paraclete cultures is that members are often engaged in the front line work of these ministries and not simply the sponsors of work that others do.

The biblical images that are resonant with Paraclete cultures are those of the Spirit, the parables of Jesus, the ministry of Jesus himself, the wilderness hospitality to strangers found in the exodus, and the Genesis garden as a primal pattern of harmony, balance, and goodness at the heart of creation.

Paraclete cultures value openness to others who think differently about their faith. Their focus on the unique, individual journey may leave them open to the charge that they are wishy-washy regarding values that are core to the larger church. Their tendency to focus on the positive potential in situations and persons may make it difficult for them to deal with the harshness of some cultural and political realities. If they lose their missional focus, they may find themselves going through the motions of set routines that have lost their deeper meaning. Alternatively, they may retreat into a corporate malaise where freedom of thought or individual pain becomes an excuse for mediocrity.

If Paraclete cultures do not find a way to balance their openness with reasonable expectations of others, they may end up attracting more needs than the resources required to address those needs. Their admirable tendency to accept people where they are may not offer an adequate level of accountability that is also essential to wholeness. Without a sufficient level of flexibility, they may become frozen in time and irrelevant to the thinking of those in the community about them.

By developing a performance dimension to their lives, Paraclete cultures add an appropriate level of expectation that can generate both strength and resources. This might be achieved through excellence in a number of areas including liturgical arts, outstanding preaching, or architecture. An emphasis on the power of the Gospel to transform and not simply comfort is also critical.



## Magi Culture

Magi cultures are ultimately concerned with the rational integrity of their faith, the just application of faith to life, and the journey of understanding. Adherence to these values shapes a community, which, at its best, exhibits deep knowledge, open discourse, and intellectual curiosity. A penetrating analytic culture makes the church a powerful ally for those in need of advocacy and a formidable foe to those with a different perspective on an issue. It is common in Magi cultures to hear folks talk about issues from a systems perspective and the need to develop safeguards for those with minority status or who lack the power to protect themselves.

Persons in Magi cultures are not averse to the wandering aspect of the faith. Indeed, they often understand faith as the foundation for wandering. This wandering can take many forms. For some, it can take the form of literal journeys with a significant percentage of the membership engaged in travel or pilgrimage, with international lecturers brought onsite, or with leaders engaged in international exchanges. For others, the wandering happens in one place and takes the form of intellectual development or liturgical exploration. It is for this reason that Magi cultures are often located near university campuses, research facilities, or other academic populations

The biblical images that are resonant with Magi cultures include the story of the Magi themselves, the children of Israel in the wilderness, the prophets who spoke to the people of God around the constellation of exiles and returns, the women who traveled about in support of the ministry of Jesus, and the ministry of Jesus himself, traveling around Judea and healing all those oppressed by evil.

Magi cultures value knowledge and understanding. For this reason, they can be perceived as aloof and unapproachable. Because their care for others is

often expressed in terms of fairness or justice, others may misinterpret them as personally cold or uncaring. Their intellectual explorations may leave them open to the charge that they lack commitment to the core values that are important to others. Their tendency to focus on the conceptual side may make it more difficult for them to deal with facility and maintenance issues. If they lose their missional focus they may retreat into esoteric debates and end up being defined by what they think rather than what they *personally* do.

If Magi cultures do not adequately develop the “hearth and home” dimension to their community life, they may find relationships difficult to develop and sustain. They also may overestimate the power of reason to manage the non-rational elements of life which may result in emotions that erupt unexpectedly and without a path for resolution. They may be so focused on larger issues that they underestimate their need for training to develop boundaries, interpersonal skills, conflict resolution, and trust.

Since their dominant reflexes are prioritized around rational understanding, they may not give proper weight to the role of emotion in persuading and enlisting support. Failing to realize that it is emotion that leads to action, they may become frustrated that their decisions do not bring about change. In their quest to be flexible they also may not give enough voice to the values of commitment and clarity which may make it difficult for them to communicate who they are to potential members.

By developing the more relational, emotional and structural aspects of their common life, Magi cultures can add the stability that will help provide sustainability over the longer term. This can also provide the cohesion that will help the community build an identity that is not focused on a particular issue.

## Performance Culture

Performance cultures are ultimately concerned with an experiential faith presented in a way that people find accessible and compelling. At their best, these cultures serve as bridges between traditional understandings of Christian beliefs and contemporary life experiences. By fusing the Christian message with a variety of innovative messaging techniques the distance between past and present is spanned in a way that increases the plausibility of the message to the target audience. Performance cultures are often able to create powerful experiences for participants that open them to alternative ways of looking at life. By shifting emotional landscapes they lay the groundwork for compelling calls to conversion and renewal.

Performance cultures are concerned with what works now, not by changing the basic message, but by discovering ways to increase the impact of that message. Venue, furnishings, music, symbols, media are all means to an end that could be changed at any time if a better method is discovered for winning people to faith or strengthening the faith of the already won. It is common in performance cultures to hear members talk about experiences, testimonies, being moved, inspired, lifted up, spoken to, touched, or convicted. Worship services, witness talks, and group experiences are specially designed for an experiential impact that can lead to conversion and transformation.

Performance cultures often rely heavily on various aspects of the performing arts. By presenting an ancient message using the best of contemporary media, internet technology or other innovative messaging approaches performance cultures create experiences in which the emphasis is widened from simply understanding the Gospel to feeling the power of it.

Performance cultures are those that can be powerfully portrayed and experienced. They are often masters at retelling Biblical stories of Individual encounters with God in a way that pulls the audience into their own encounter. While the confrontation may be more indirect than that of a revivalist tent meeting, the result is the same: a crisis is created and a choice must be made. Performance cultures are also resonant with the experiential quality of the Psalms and may build much of their worship experience around simple verses set to music.

Performance culture efforts to make an eternal message fresh and accessible may leave them open to the charge that they fail to recognize the importance of a shared tradition. In addition, they may underestimate the creativity and resources required to be effective in their approach. The gap between the performance ideal in the mind and the actual reality may lead to a new tradition of mediocrity that fails its purpose. If performance cultures lose their missional focus they may find themselves chasing a religious high where lives are rarely changed and change does not have adequate roots to be sustainable.

If Performance cultures do not adequately develop the deeper dimensions of their community life they run the risks of shallowness and pretense. Their tendency to focus on conversion and transformation may not appreciate the often slow and painful process required for spiritual development and recovery from trauma. Their inability to acknowledge the abiding shadows within the human personality can lead to personal behaviors that are inconsistent with their public persona. By incorporating service to others, spiritual direction and spiritual disciplines that have proved valuable to Christians across the centuries, Performance cultures can ground the gifts and creativity that give them such an impact upon the people around them.

# Leadership and Information Seeking Behavior

Religious organizations are systems that evolve as they interact with their changing environments. Different environments require different organizational cultures, structures, and strategies, but they also require different information systems. A leadership style that is out of sync with the environment it is called to serve will fail, not for want of purpose or goodness, but because it is a two prong system in a three prong world. However, having a synced leadership style will not be adequate if an information system is not developed that will provide the organizational intelligence required for effective action. The stages of that evolution and the corresponding information system are described below.

## **The Instrumental Stage**

In the instrumental stage the leader understands the organization as an extension of him/herself. The leader's task is to develop a vision for the organization and then exercise the authority to direct the organization toward that vision. A high degree of member loyalty enables the leader to function without a sharp line between his/her own internal perspectives and those within the universe of his organization. His/her primary task lies in constructing an administrative structure that is responsive in a relatively linear, cause-and-effect chain of action. The instrumental stage of leadership works well in contexts where options for members are limited. It also works well in short-term crisis situations found in emergency departments, fire departments, police departments, and the military.

The information sought at this stage focuses on assets that can be used to support the leader's vision. These tend to be objective in nature, members, money, and facilities. Since loyalty to a particular tradition and its positional proxy is paramount, there is little need to seek out the subjective information regarding the perspectives, experiences, and aspirations of members. In fact, a focus on these can be seen as hampering the implementation of the leader's vision.

The instrumental stage begins to break down when institutional loyalty begins to erode. Information about membership, money, and facilities begins to indicate a downward trend but that data alone provides few clues for a different course of action. If the leadership does not move forward to the next stage, it will keep trying to drum up support with a dwindling base of assets and collecting objective data as a matter of habit that only documents its demise.

## **The Generalizing Stage**

In the generalizing stage the leader realizes that the organization is not simply an extension of him/herself. Members have their own views which are distinct from the leader. Moreover, members have options. They can and will leave, taking their resources with them. Now the leader begins to pay more attention to what members

think, but using an affiliative approach. Here, information flows to the leader through a set of relationships and is collected primarily through conversations. While these conversations represent a relatively small subset of the entire organization, the leader generalizes the information to reach conclusions about the entire body. The

leader trusts his/her own powers of observation to assess the basic status of the organization. As these observations accumulate over time, the leader may become the institutional memory of the organization and members may defer to his/her understanding of where things stand.

The generalizing stage works well in small organizations where it is possible for the leader to have substantive conversations with nearly every member. It also works well in larger homogeneous organizations where a relatively small subset of members really does represent the views of the many. Where the rate of change within the organization is relatively low, episodic interactions spaced over time continue to be valid even though months or years may pass. The generalizing stage begins to break down in larger, more diverse, and rapidly changing environments. Accustomed to the accuracy of the extrapolation of his/her own experiences across the entire organization, s/he begins to make mistakes. This can take the form of eruptions from minorities who do not feel that their perspectives, experiences, and aspirations are taken into account. In some cases the leader may find that s/he has really generalized a minority view and set out to lead only to discover that hardly anyone is following. If the leadership does not move forward to the next stage, it will find itself asserting that it “knows what is going on” in a jack-in-the-box organization where surprises keep shooting up and hitting its leaders on the chin.

### **The Neural Stage**

In the neural stage, the leader begins to place less trust in their own immediate perceptions and seeks methods of collecting information that reliably represents the entire organization. This takes place particularly at moments when critical decisions need to be made that have a wide impact, especially the search for a new leader. The leader is confronted with a logistical challenge. Broad input is required to insure buy-in, but there may not be adequate time to have conversations with the numbers of people required to have reliable information that reflects the entire system.

Here the leader begins to engage a set of tools to supplement the conversational data, an organization-wide survey. This generates a symbolic narrative, that is, the story of the entire system told using numbers as symbols of the perspectives, experiences, and aspirations of the membership. Such a symbolic narrative accommodates both the unity and the diversity of the body. It can be administered in a timely manner and it is repeatable. Using digital technology and benchmarking, the symbolic narrative can identify particular qualities, areas of strength and weakness, as well as reservoirs of energy and concern. In the neural stage, leaders begin to use this system-wide information episodically when major decisions need to be made. But as the information gathering possibilities grow so does the amount of information collected.

In the neural stage, the focus is on learning what is happening in the organization in an episodic fashion. But so much emphasis is placed on collecting information that inadequate attention is paid to how to use the information in a way that promotes effectiveness. The neural stage begins to break down as the leader begins to

be overwhelmed with information. Expecting that information will actually make the hard decisions for what to do next, s/he instead finds that it simply raises more questions. If the leadership does not find a way to move to the next stage, the organization will fall into the well-known trap of analysis paralysis.

### **The Integrating Stage**

In the integrating stage, the leader shifts from simply collecting more information to the development of a system of organizational intelligence that will not only articulate needs and concerns, but also identify and mobilize resources. Here, it is not the leader who becomes the answer to all the questions raised by the information system. *It is the learning of the system itself.* As the information system identifies elements of the organization that have discovered pathways to effectiveness and even best practices these are celebrated and shared. Whereas in other stages of a declining organization the sharing of effectiveness is discouraged because it suggests an autonomy which is antithetical to the instrumental stage or a distinctiveness which is antithetical to the generalizing stage, now transparency is a value that is enacted and rewarded.

This goes far beyond the simple brainstorming familiar to most leaders. In the integrating stage, information is synthesized with the creativity of the Spirit and the best practices from the larger church to develop a unique offering of the Kingdom of God with its own mark and quality. If the larger system does not give enough support to experimentation, the changes in the environment will outstrip organizational learning and the system will revert back to the neural stage.

Organizations tend to move back and forth between these stages at critical junctures. For example, a religious organization may live in the generalizing stage where it relies on the institutional memory and perspective of a pastor and small group of leaders. Upon the resignation of the pastor, the organization realizes it no longer has the information it needs to embark upon a search. It quickly moves to the neural stage and conducts a survey. But, not long after the next pastor arrives, it reverts back to the generalizing stage. This almost guarantees that it will remain ineffective in the long run and will decline to the size where the informational system in the head of one person will accurately reflect the whole.

## **FAQ: The Clergy Profile**

Holy Cow! Consulting has worked with thousands of churches over the last 25 years, providing services for congregational assessment and strategic planning.

*Q What is the Clergy Profile?*

A The *Clergy Profile* is a compilation of the responses from Questions 2, 11, 18, 20, 25, 27, 29, 39, 47 and 49 of the *Congregation Assessment Tool*®. There are three indices that comprise the profile: Worship and Preaching, Pastoral Care, and Leadership.

*Q What is the purpose of the Clergy Profile?*

A The primary purpose of the *Clergy Profile* is to provide feedback to the senior clergy leadership of a congregation as an aid to discernment, celebration, professional growth and team-building. Where the clergy person has moved on to a new call, it is intended to help bring closure to a previous pastoral relationship with increased insight regarding strengths and growth areas.

*Q Why is the Clergy Profile not included in the Vital Signs® report?*

A The *Clergy Profile* is a confidential report sent only to the clergy. As a rule, the data from any survey questions that pertain to the performance of a particular individual, staff or lay, are returned confidentially to that individual.

*Q Are there any exceptions in which Holy Cow! Consulting will release the Clergy Profile to the lay leadership?*

A. The *Clergy Profile* will be released upon receipt of a written authorization from the clergy person.

*Q What is the value of the data from the clergy questions to lay leaders when it does not appear in the Vital Signs® report?*

A While the percentage responses to the clergy questions do not appear in the *Vital Signs*® report, the responses to those questions are calculated in the drivers of satisfaction. This can provide very important information to church leaders. For example, if three of the five drivers of satisfaction include questions regarding the clergy, it suggests that the church is *clergy-centric* which can result in high levels of anxiety for both church and clergy. The clergy questions which appear in the drivers list also provide guidance to search committees regarding what members consider important in the work of the clergy person. Newly arrived clergy will benefit from a review of the drivers of satisfaction because these provide clues to what members are basing their sense of well-being on. Finally, the information in the *Clergy Profile* can indirectly benefit the church by providing feedback to the clergy person on potential areas of strength and growth.

*Q If the clergy person shares his/her Clergy Profile, how should the leadership handle that information?*

A First, it is important for leaders to understand the path of vulnerability that the clergy person has chosen by sharing the profile. This requires a commensurate level of sensitivity, respect, and discretion on the part of the lay leadership. Second, every profile will disclose some aspects that are stronger than others. Sometimes, working together with the clergy person leaders may discern ways to shore up areas of weakness. Other times they may chose to celebrate areas of strength and choose instead to build a

leadership team that will complement the clergy person's weaknesses. In all cases, the *Clergy Profile* should be considered in the larger context of the *Vital Signs*® report and the shared responsibility of the congregation for its own health and vitality.

*Q Should the Clergy Profile be shared with the congregation?*

A Generally, we do not find it helpful to share the information in the *Clergy Profile* with the congregation. With the permission of the clergy person, it can be placed in his/her personnel file.

## Glossary

<i>Baseline</i>	A measurement that serves to establish the conditions of an organization at a given point of time, eg, the beginning of a Rector's service.
<i>Benchmark</i>	A standard by which a measurement is evaluated.
<i>Correlation</i>	A measure of the degree to which the data from two questions are related to one another and tend to rise or fall together (directly or inversely).
<i>Cross tabulation</i>	The cross referencing or comparison of two variables (such as satisfaction level and demographics) to determine how they are interrelated. A crosstab gets its name from the layout of variable definitions into rows and columns.
<i>Descriptive Index</i>	An index that measures an aspect of a congregation's life with no value attached to it.
<i>Driver</i>	A question that tends to be more important than others because has a large impact on how respondents are feeling about the church <u>overall</u> .
<i>Frequency count</i>	The number of times a question receives a particular response.
<i>Index</i>	A grouping of questions by theme.
<i>Mean</i>	The average value of two or more numbers.
<i>Percentage</i>	The number of particular responses to a question divided by the total responses and multiplied by 100.
<i>Percentile Rank</i>	A number between 1 and 100 that indicates what percentage of a data set falls beneath a given score.
<i>Performance Index</i>	An index that measures an aspect of a congregation's life in which a higher score is more desirable.
<i>Standard deviation</i>	A measure of the spread of a distribution. The higher the standard deviation in response to a question, the more disagreement among respondents.