



THE CAT (CONGREGATION ASSESSMENT TOOL) GUIDE

EVIDENCE-BASED DISCERNMENT & ORGANIZATIONAL INTELLIGENCE IN CONGREGATIONAL LIFE

A PRAYER OF PREPARATION FOR ORGANIZATIONAL INTELLIGENCE

Lord, you are the God of all truth. You know us through and through. You reveal to us what we do not yet know, bringing us out of darkness into your wonderful light. Open our minds and hearts to the witness of our brothers and sisters, giving us that love that casts out all fear, guiding our discernment into your fruitful service. Amen.

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EXECUTIVE INTRODUCTION

In contrast with other successful organizations today, the leadership team of a typical congregation is generally unaware of how members are actually experiencing the church. While hospitals, public libraries, and local businesses continuously track satisfaction rates hovering between 75% and 95%, church boards and staff frequently demonstrate wide, contradictory guesses regarding member satisfaction and energy.

This lack of empirical clarity leads to strategic paralysis, conflict, poor pastoral fit, and leader burnout. Evidence-based discernment replaces guesswork with genuine organizational intelligence (OI)—combining objective count data with subjective witness data to deliver congregations from confusion into purposeful, inspired action.

SECTION 1: WHAT IS EVIDENCE-BASED DISCERNMENT?

Evidence-based discernment is a process of discovery that integrates organizational intelligence, core values, and an inspired imagination to establish a clear, vital course of action. When these three elements operate in synergy, each enriches the others. In isolation, vision turns into ungrounded fantasy, and core values deteriorate into rigid legalism.

The Anatomy of Organizational Intelligence

Organizational Intelligence (OI) is the collective capacity of a congregation to process information, learn from its internal and external environments, and adapt its behavior to fulfill its core mission. True organizational intelligence rests upon two distinct types of data:

1. Objective Count Data

Physical, quantitative counts: worship attendance, pledge totals, facility square footage, budget line items, and Sunday school enrollment.

2. Subjective Witness Data

The lived experience, satisfaction, energy, spiritual aspirations, and personal perspectives of the members themselves (PEAs: Perspectives, Experiences, Aspirations).

Scriptural Foundation: "Smart Love"

"And this is my prayer: that your love may abound more and more in knowledge and depth of insight, so that you may be able to discern what is best..." — Philippians 1:9-10

Love is primary, but Apostle Paul recognizes that knowledge and insight are necessary conditions for love to abound fruitfully. "Smart love" combines spiritual motivation with objective understanding and divine imagination.

Most churches manage almost exclusively by Count Data. However, Count Data is a *lagging indicator*—by the time worship attendance or pledge totals drop, the underlying spiritual or relational shift happened 18 to 24 months prior. Evidence-based discernment utilizes Subjective Witness Data as a *leading indicator*, enabling leaders to sense shifts and discern direction before structural decline occurs.

DISCUSSION & REFLECTION — SECTION 1

1. How does relying exclusively on lagging indicators (like budget and attendance) handicap a leadership team?

2. In what ways can collecting subjective witness data strengthen trust between members and leaders?

SECTION 1 (CONT.): FOUR ALTERNATIVE APPROACHES VS. EVIDENCE

Over time, evidence-based discernment cultivates leadership mastery, building sustainable morale through real achievement rather than artificial pep talks. When leaders lose touch with empirical knowledge, inflated opinions replace genuine insight, feeding unnecessary conflict over knowable facts.

Discernment Approach	Primary Basis	Inherent Limitation
Impression-Driven	Internal thoughts/feelings of leaders	Grounded in unverified personal bias.
Anecdotally-Driven	Grapevine conversations with vocal members	Skewed by loud or atypical voices.
Authority-Driven	Positional power and hierarchy	Demands compliance without buy-in.
Expert-Driven	Outside consultant opinions	Fails to build internal ownership.
Evidence-Based	Systematic Witness & Count Data	Public, transparent, and accountable.

Count Data vs. Witness Data: Count data is useful, but churches are fundamentally enterprises of the soul. Souls can only be known through Witness Data—the Perspectives, Experiences, and Aspirations (PEAs) disclosed when members speak.

Case Study: St. Thomas Episcopal Church

Validity Status	Recovery	Member Focus	Pastor-Focused
Critical Factor	How well the Pastor keeps members informed & brings out the best in everyone		

"An unexpected and significant change took place in the parish after the assessment report was delivered. The expressed conflict almost disappeared. Parishioners began taking responsibility for key ministries and reoriented the parish outward." — Rector, St. Thomas

DISCUSSION & REFLECTION

1. Why does a simple, objective presentation of member feedback frequently reduce interpersonal conflict in a board room?

2. What are the risks of continuing to rely on informal, anecdotal listening in a growing congregation?

SECTION 2: PREPARING FOR THE JOURNEY: TRUSTING THE INSTRUMENTS

Spatial disorientation occurs when an aviator loses visual contact with the horizon. Lacking visual references, pilots who trust their internal body sensations over their cockpit instruments inevitably enter a "graveyard spiral." Flying by the seat of your pants is the leading cause of spatial disorientation fatalities in aviation.

The Human Brain's Perception Limits

"Having an accurate perception of reality is not one of the brain's strong points. The human brain seems to have difficulty separating fantasies from facts... it doesn't even try to create a fully detailed map of the external world." — Dr. Andrew Newberg

Similarly, church leaders were not built to accurately sense the unexpressed perspectives of hundreds of people. Lacking reliable instruments, leaders scale the church down to their personal perceptual capacity, leading to organizational crashes.

Case Study: First Congregational Church

Assessment Stage	Vitality Status	Key Finding / Critical Factor
Initial Assessment	Transformational	High vulnerability around <i>Tolerance for Differing Opinions</i> .
Leadership Action	Dismissed data as a "liberal value"; called a pastor misaligned with system data.	
Follow-Up Assessment	Recovery (Plummeted)	Severe conflict, budget collapsed, giving dropped from 4.0% to 1.4% of income.

DISCUSSION & REFLECTION — SECTION 2

1. Why do church boards often find objective data so hard to trust? What gets in the way?

2. How can a leadership team build the discipline necessary to act on counter-intuitive instrument data?

SECTION 2 (CONT.): FOLLOWING THROUGH WITH INSTRUMENTS

Contrast the cautionary tale of First Congregational with the Presbytery of Greater Atlanta. Confronted with severe budget deficits and member dissatisfaction, leadership chose to trust their diagnostic data completely.

Turnaround: Presbytery of Greater Atlanta

Initial assessment indicated that only 22% of members felt regional meetings were a good use of time. Executive leadership restructured meeting formats and systematically tracked attendee ratings: **74% rated meetings Good** and **19% Fantastic**. Financial giving rebounded sharply as satisfaction rose.

Key Characteristics of Data-Responsive Leadership

1. Secure Executive Leadership

Handles evaluative data without defensiveness or discouragement.

2. Corrective Mindset

Willing to adjust internal impressions when data contradicts intuition.

3. Political Resilience

Resists pressure from vocal special-interest groups that ignore data.

4. Longitudinal Commitment

Tracks key metrics over time to evaluate actual progress.

DISCUSSION & REFLECTION

1. Which of the four characteristics above represents the greatest hurdle for your current leadership team?

2. How can tracking feedback continuously prevent small problems from becoming organizational crises?

SECTION 3: PREPARING FOR THE JOURNEY: ADMITTING SURPRISES

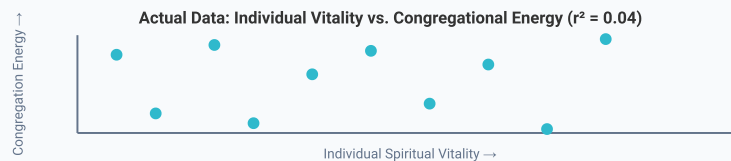
Major structural disasters often occur because designs are based on unchecked, plausible-sounding assumptions. In church ministry, leaders frequently invest millions into programs built on foundational assumptions that empirical research proves false.

Surprise #1: Leaders Do Not Have Internal Clarity

Board members routinely assume they share a unified perception of the church. In reality, individual leaders are usually envisioning completely different organizations, leading to conflicting strategic directions.

Surprise #2: Individual Spiritual Vitality vs. Congregational Energy

It is widely taught that if individuals deepen their personal relationship with God, congregational vitality naturally follows. Empirical data reveals almost zero correlation between individual spiritual vitality and corporate congregational energy.



DISCUSSION & REFLECTION – SECTION 3

1. How does realizing that individual spirituality does not automatically create congregational health reframe discipleship strategy?

2. Why are dead-end findings valuable in strategic planning?

SECTION 3 (CONT.): THEOLOGICAL VIEWPOINTS & ADMINISTRATION

Surprise #3: Biblical Interpretation & Vitality

Churches across the theological spectrum often believe that converting members to their specific view of Scripture is key to renewal. Empirical data shows that literal vs. non-literal theological perspectives contribute less than 1% to congregational energy.

Surprise #4: The Six Universal Predictive Factors

1. Vital Worship Inspiring, high-quality worship experiences that connect with attendees.	2. Lifelong Learning Active educational opportunities for every age and stage of life.
3. Adaptable Formation Spiritual formation tailored to complex contemporary schedules.	4. Open Governance Decision-making systems that are transparent and accessible.
5. Quality Relationships Authentic, welcoming interpersonal connections and culture.	6. Internal Flexibility Willingness to adapt methods to fulfill core mission goals.

Administration vs. Performance Functions

Most pastors excel at **Administration** (managing internal operations, by-laws, facility maintenance). While bad administration dissatisfies, great administration alone never creates vitality. Vitality requires excelling at the **Performance Function**—doing the right things to fulfill mission and generate spiritual fruitfulness.

DISCUSSION & REFLECTION

1. Why do church boards frequently default to administrative tasks while delegating mission performance?

2. How can your leadership shift 30% of its meeting agenda time from maintenance to performance drivers?

SECTION 4: SPIRITUAL GROUNDWORK: THE UNLIVED LIFE

In addition to its daily routine, every congregation carries within its corporate soul an "unlived life"—a latent potential residing beneath surface operations. When ignored, this unlived life manifests as chronic organizational dissatisfaction.

The Paradigm of Jesus' Wilderness Journey

Between his life as a carpenter and his unlived life as Messiah lay the wilderness. To step into his true calling, Jesus listened to fresh voices at the Jordan River, stepping away from familiar routines. Congregations must similarly open themselves to fresh external voices—including the true witness of their members—to discern their calling.

The Three Corporate Wilderness Temptations

- 1. Institutional Hunger (Stones into Bread):** Focus on internal survival resources. Action is delayed until reserves drop below critical thresholds.
- 2. The Tactical Short-Cut (Jumping from the Temple):** Calling a charismatic savior-leader to revitalize the church without requiring system change.
- 3. Transformational Naïveté (Kingdoms of the World):** Pretending dark, dysfunctional dynamics will vanish automatically as vitality grows.

DISCUSSION & REFLECTION — SECTION 4

1. Which of the three corporate temptations is currently most subtle in your church?

2. How can leadership create safe spaces for members to acknowledge their unlived potential?

SECTION 4 (CONT.): PERCEPTUAL DEFENSES & SPIRITUAL PRACTICE

When confronted with true organizational reflection, human systems instinctively deploy three defense mechanisms modeled in Genesis 3:

Shame

Viewing unflattering data as personal failure, leading to ego-defensiveness or hiding behind superficial reports.

Denial

Misinterpreting data to protect illusions (e.g., celebrating being in the 1st percentile, assuming it means #1).

Blame

Targeting pastors, search committees, or tools ("The woman you gave me...") rather than taking corporate ownership.

Organizational Intelligence as Revelation

All truth is God's truth. Discovering the genuine perspectives, experiences, and aspirations of a congregation is a revelatory act—moving from perceptual darkness into light. It delivers leaders from the isolation of their own projections.

Essential Spiritual Practice

Without grounding in spiritual practice—prayer, confession, study, and the passing of peace—organizational insights degenerate into trivia, relational wounds are probed without healing, and defensiveness hardens. Assessment must be embedded within a community of grace.

DISCUSSION & REFLECTION

1. How can your leadership team utilize confession and grace when reviewing difficult assessment results?

2. What specific spiritual habits can ground your board during strategic planning?

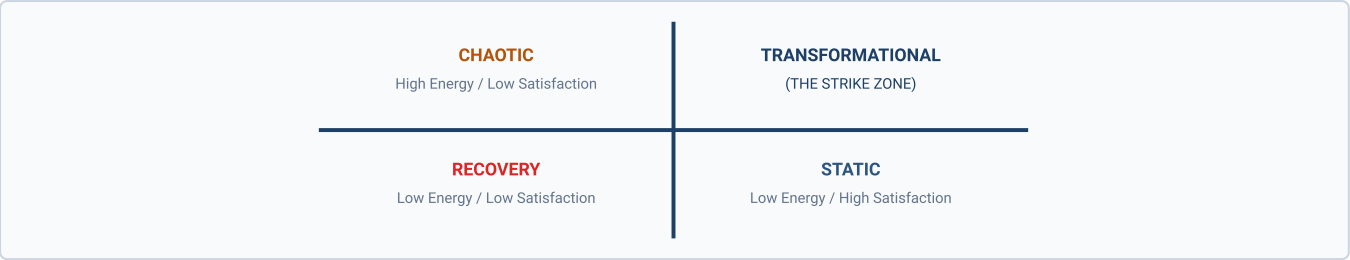
SECTION 5: DEFINING THE TARGET: THE STRIKE ZONE

Every fruitful team effort requires a clear target and an objective way to know if the target has been hit. In congregational life, everything hinges on how we define church health.

Defining the Metrics: Satisfaction and Energy

Satisfaction (Shalom): Derived from Latin *satisfacere* ("enough"), reflecting completeness, peace, rest, and sound harmony rather than self-satisfied complacency.

Energy (Force of Engagement): Reflects a compelling shared purpose paired with active, meaningful engagement across the membership.



The Congregational Strike Zone Defined
A healthy, vital church is one where at least 70% of members bear witness to clear Satisfaction (Shalom) and at least 85% bear witness to clear Energy and excitement.

DISCUSSION & REFLECTION – SECTION 5

1. Where on the Energy-Satisfaction matrix do you intuitively place your church today? On what evidence do you base this?

2. How does distinguishing energy from satisfaction help diagnose organizational issues?

SECTION 5 (CONT.): FOUR DISTINCT VITALITY STATES

Depending on its location on the Energy-Satisfaction map, a congregation operates within one of four distinct organizational states:

- 1. Chaotic Systems (High Energy / Low Satisfaction):** High engagement out of alignment with central leadership. Autonomous activity centers generate noise and flash, but fight central alignment, resulting in widespread friction.
- 2. Recovery Systems (Low Energy / Low Satisfaction):** Morale has eroded. Over two-thirds of members are merely going through the motions. Trying to recruit new members into a demoralized recovery system only burdens newcomers further.
- 3. Static Systems (Low Energy / High Satisfaction):** Congenial and comfortable, but stuck in non-fruitful patterns. Members enjoy one another but lack the internal energy required to arrest numerical and financial decline.
- 4. Transformational Systems (High Energy / High Satisfaction):** Vibrant, outwardly focused, and spiritually zestful. Transformational churches exist across all sizes, traditions, and settings, offering strong foundations for mission expansion.

System Trajectories & Leadership Requirements

System	Strategic Trajectory	Primary Leadership Style
Chaotic	Build alignment & shared vision	Union Negotiator (Manages boundaries)
Recovery	Re-establish basic discipleship	Line Coach (Focuses on fundamentals)
Static	Bypass existing stuck structures	Triage Nurse (Makes tough choices)
Transformational	Replication & external mission	Field Marshal (Optimizes assets)

DISCUSSION & REFLECTION

1. Why is a completely different leadership style required to guide a Recovery church versus a Transformational church?

2. Why is it easier to address operational defects in a Transformational church than in a Static church?

SECTION 5 (CONT.): GAS GAUGES AND MULTIPLE TARGETS

Satisfaction and energy are like happiness: neither is achieved by chasing it directly. They are by-products of faithful, effective ministry. Measuring satisfaction is like reading a gas gauge—it tells you if the tank is empty, but it isn't the fuel itself.

High Satisfaction vs. Self-Satisfaction

Critics sometimes allege that targeting high satisfaction produces self-centered, consumer-driven churches. Empirical research shows the exact opposite:

Low Satisfaction Churches

Obsessed with internal survival: raising budget, fixing worship, attracting warm bodies.

High Satisfaction Churches

Outwardly focused: international mission, local community transformation, social justice advocacy.

The Three Targets of Organizational Health

To achieve long-term congregational health, leaders must monitor and hit the strike zone across three distinct organizational levels:

- **The Congregation:** Overall member satisfaction and energy.
- **The Leadership Team:** Alignment and trust between the Board and Clergy.
- **The Staff:** Health, morale, and role clarity among paid personnel.

If the leadership team or staff is dysfunctional, that dysfunction eventually spills into the pews. Knowing the exact state of all three spheres equips leaders to address issues before systemic breakdown occurs.

DISCUSSION & REFLECTION

1. Why do low-satisfaction churches tend to become more self-absorbed than high-satisfaction churches?

2. How healthy is the alignment between your clergy, board, and staff currently?

SECTION 6: LEAST ENERGY TO MOST-LIKELY-TO-SUCCEED SOLUTIONS

In the famous 1967 NFL "Ice Bowl," Green Bay needed one foot to win. Quarterback Bart Starr turned to guard Jerry Kramer: "If you can move Jethro Pugh twelve inches to the left, we win." Kramer moved him; Green Bay won. Leaders must know exactly what needs to be moved and by how much.

Avoiding Least Energy Solutions

Churches routinely suffer from volunteer shortages. In a typical church, 25% of members feel underutilized—meaning roughly 15 million Christians nationally have unused gifts. Why the recruitment shortage? Leaders choose "least energy solutions" (e.g., placing generic newsletter appeals) based on false assumptions.

Least Energy vs. Most-Likely-to-Succeed Recruitment	
Least Energy Approach (Fails)	Most-Likely-to-Succeed Approach (Works)
Generic announcements in bulletins	Personal asks matched to member gifts
Slot-focused (filling empty committee seats)	Ministry-focused (shaping roles around passions)
Assuming lack of awareness	Addressing past volunteer burnout/bad experiences

In the absence of reliable organizational intelligence, leaders consistently revert to path-of-least-resistance habits that yield zero long-term fruit.

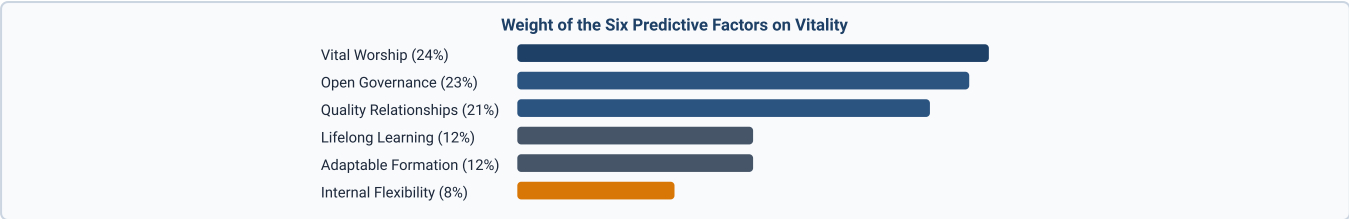
DISCUSSION & REFLECTION – SECTION 6

1. In what areas is your church currently relying on "least energy solutions"?

2. How can your recruitment shift from filling organizational slots to equipping personal gifts?

SECTION 6 (CONT.): THE SIX CRITICAL DRIVERS

Statistical analysis across hundreds of congregations identifies six operational factors that drive member satisfaction and energy.



Worship is Primary: If a leadership team can invest in only one area, worship yields the largest return. Without inspiring worship, building congregational energy is nearly impossible.

Case Study: Ormond Beach Presbyterian Church

Profile: Transformational Status | Energy in top 5% nationally.
Despite a modest average attendance (190) and a large seasonal "snowbird" population, members rate worship quality in the 99th percentile nationally. Their secret? They annually send 20 lay leaders and staff to regional worship conferences—investing heavily in a most-likely-to-succeed solution.

DISCUSSION & REFLECTION

- 1. How does your church's resource allocation align with the six predictive factors above?
- 2. What steps can your church take to elevate worship quality without needing a mega-church budget?

SECTION 6 (CONT.): THE TRAP OF PASTORAL CARE

Pastors and boards frequently assume that providing exceptional, direct pastoral care to individuals is the key driver of church vitality. In 30 years of collecting data, individual pastoral care almost *never* emerges as a primary driver of overall congregational energy or satisfaction.

Pastoral Care is Like Food: A Satisfier vs. Dissatisfier

Pastoral care operates as a basic hygiene factor:

- **An Absence Creates Dissatisfaction:** If a pastor neglects visiting hospitalized members, severe dissatisfaction spreads rapidly.
- **An Excess Creates Dependency:** Beyond an adequate level, providing more direct pastoral care does not increase congregational health; it creates codependency, distracts pastors from leadership, and weakens lay caregiving.

Hygiene Factors (Dissatisfiers)

Adequate pastoral care, fair compensation, facility maintenance. (Crucial to maintain, but does not drive growth).

True Satisfiers (Vitality Drivers)

1. Bringing out the best in people.
2. Articulating a compelling vision.
3. Keeping people informed & connected.

Short-term feedback loops trap pastors in pastoral care routine—a missed visit produces an immediate complaint, whereas vision casting yields quiet, long-term fruit. Organizational intelligence protects leaders from short-term noise, keeping them focused on true satisfiers.

DISCUSSION & REFLECTION

1. How can your leadership support the pastor in shifting time from direct caregiving to vision casting and equipping leaders?

2. What mechanisms can your church establish to empower lay pastoral care teams?

SECTION 7: ENVISIONING DESIRED OUTCOMES

Clarity regarding current vitality is half the equation; leaders must also know where members want the church to go. Members hold mental images of desired outcomes, measuring success against how well the church realizes those aspirations.

The Absence of the Barking Dog

In Sherlock Holmes' *Silver Blaze*, the key clue was that the watchdog did not bark—meaning the intruder was familiar. In churches, the absence of empirical member feedback goes unnoticed because leaders don't know to miss it. Consequently, leaders rely on anecdotal guesswork.

Case Study: Calvin Presbyterian Church

When 29 board members were asked to guess how the congregation overall would rank *"Expand outreach to margins of society"* out of 10 priorities:

Board Guess	Number of Leaders	Implied Strategic Direction
Ranked 1st - 3rd	6 leaders	Aggressive outreach, community cell groups, fund development.
Ranked 4th - 6th	13 leaders	Moderate balanced focus.
Ranked 7th - 10th	10 leaders	Internal focus: worship, spiritual formation, facility focus.

The board held completely contradictory views of member aspirations. Board decisions made under such confusion trigger friction at every turn, as leaders unknowingly execute strategies opposed to actual member energy.

DISCUSSION & REFLECTION — SECTION 7

1. How does a wide divergence in board guesses regarding member priorities sabotage strategic execution?

2. Why is anecdotal feedback from congregational meetings unreliable for setting long-term goals?

SECTION 7 (CONT.): NATIONAL PRIORITIES VS. LOCAL IDENTITY

While national research provides useful context, relying on average trends obscures what is distinctive about a specific congregation.

National Ranking of Congregational Outcomes

Rank	Priority Outcome (National Average)
1st	Develop/implement comprehensive strategy to reach new people.
2nd	Make necessary changes to attract families with children & youth.
3rd	Provide high-quality education for every age and stage of life.
4th	Develop ministries working toward healing those broken by life.
5th	Create opportunities to form meaningful relationships.
6th-10th	Equip members for leadership; relationship building; outreach.
11th-15th	Deepen worship; pastoral care; social advocacy; music changes.
16th-17th	Expand international mission; enlarge/improve facilities.

Local Distinctiveness is Key: In a lot of churches, facility expansion ranks last. However, in specific congregations, it ranks 1st. In some churches, attracting young families is 1st; in others, it is 17th. Post-COVID, some churches have found there is a deeper desire for connection and relationships than ever before, while others have found a deep need for spiritual learning to find healing. This is why packaged church growth books fail because they prescribe generic solutions without diagnosing local distinctiveness.

DISCUSSION & REFLECTION

1. Where does your leadership assume congregational priorities lie? How do you verify those assumptions?

2. Why can adopting a generic national blueprint be damaging to a unique local church?

SECTION 7 (CONT.): GENERATIONAL INTELLIGENCE

Setting strategic direction requires parsing priorities across generational cohorts, especially for churches seeking to bridge age divides.

Comparing Generational Priorities

Priority Rank	Baby Boomers (Over 65)	GenZ & Young Millennials (Under 35)
1st Priority	Reach new people	Attract young families & youth
2nd Priority	Attract young families & youth	Direct outreach to margins of society
3rd Priority	Develop spiritual generosity	Create relationship opportunities
4th Priority	Healing ministries	Reach new people

Shared Ground

Both cohorts prioritize reaching new people and attracting young families.

Distinct Drivers

Baby Boomers worry about financial stewardship and health care. GenZ and Millennials focus on societal impact and authentic community.

DISCUSSION & REFLECTION

1. How does your church balance Baby Boomer stewardship concerns with GenZ/Millennial demands for social impact?

2. Are your current programs designed for multi-generational engagement or siloed by age?

SECTION 8: CONFRONTING SPIRITUAL DISSONANCE

Congregational priorities cannot be accepted uncritically. Assessments frequently expose internal contradictions where members desire two mutually exclusive outcomes simultaneously. This state is called **Spiritual Dissonance**.

Case Study: A Tale of Two Neighboring Churches

Metric	First Church	Second Church
Vitality Status	Transformational (Hundreds in worship)	Recovery (20 in worship)
Demographics	Senior Adult Community	Senior Adult Community
Top Priority	Serving Senior Adults (Lowest priority: Youth)	Attracting Youth & Families (No youth exist)

Second Church was trapped in spiritual dissonance—paralyzed by guilt over not having youth in a retiree community. First Church embraced its context, thriving by ministering powerfully to older adults.

The Nature of Dissonance

Spiritual dissonance is an organizational lie that hamstring ministry. When a church seeks youth in a community without youth, or demands young families while refusing to change traditional worship, it sets up its leadership for guaranteed failure.

DISCUSSION & REFLECTION – SECTION 8

1. What contradictory impulses (e.g., wanting growth while refusing change) exist in your congregation?

2. How does spiritual dissonance create pastor burnout?

SECTION 8 (CONT.): SPIRITUAL RESOURCES & CONCRETE ACTION

Spiritual dissonance cannot be resolved through facilitation techniques or political compromise alone. It requires engaging spiritual resources to dismantle institutional lies.

6 Steps to Resolve Spiritual Dissonance

1. **Name the Dissonance:** Clearly identify the contradictory desires. Naming delivers power over the illusion.
2. **Acknowledge Realities:** Recognize that other churches have broken similar logjams.
3. **Engage Spiritual Rites:** Frame the issue around baptismal vows—renouncing falsehood, confessing complicity, receiving forgiveness, and passing peace.
4. **Take Small, Concrete Actions:** Experiment with small steps (e.g., serving lunch to local retirees) without requiring immediate long-term commitments.
5. **Celebrate Progress:** Tell stories and offer prayers of thanksgiving for small victories.
6. **Prepare for Regression:** Anticipate classic excuses ("It won't work anyway") and prepare faithful responses in advance.

Organizational intelligence provides the clear "why" behind necessary changes, enabling members to make conscious choices rather than falling back into unconscious, rutted habits.

DISCUSSION & REFLECTION

1. How can small, low-risk experiments help a church break out of paralyzed dissonance?

2. How can your board prepare for emotional regression when implementing changes?

SECTION 8 (CONT.): CORPORATE PASTORAL CARE

Clergy undergo rigorous training to minister to individuals facing personal trauma. However, they receive minimal training on providing **Corporate Pastoral Care** to a traumatized or paralyzed congregation.

A church system can be just as paralyzed by corporate spiritual dissonance as an individual facing illness or grief. Lacking diagnostic tools, clergy are forced to operate like organizational Christian Scientists—setting faith and intelligence at odds.

Case Study: Trinity Church (Dependency Trap)

Profile: Recovery Status | Ministry-Focused.

A wealthy pastor funded a spectacular new wing and covered two-thirds of the church budget personally. Over ten years, members withdrew from active ministry, developing severe organizational dependency. The pastor loved the church, but lacking organizational intelligence, failed to see he was crippling member engagement.

Holding the Line: Leadership is like attempting to fish—pull too hard and the line breaks; leave too much slack and the fish spits the hook. Organizational intelligence tells clergy exactly how much tension the line requires to bring the congregation safely along.

DISCUSSION & REFLECTION

1. In what ways does your church currently require corporate pastoral care?

2. Is your leadership currently holding the line too tightly or allowing too much slack?

SECTION 9: CHURCH OPERATING SYSTEMS & CULTURE

Programs that flourish in one church frequently crash in another. The problem is rarely the program itself; it is an incompatibility with the church's underlying **Operating System** (Organizational Culture).

Common Growth Strategy "404 file not found" Errors

Growth Strategy Requirement	Conflicting Operating System Value	Resulting "404 Error"
Forming new groups for new people	Channeling newcomers into old groups	Conflict between veteran leaders and newcomers.
Low entry thresholds (screens, modern music)	High value on familiarity and tradition	Fierce battles over pews, hymnals, music individuals don't like, and technology.
Verbal faith-sharing in daily life	Faith viewed as private/intellectual	"We are not pushy evangelists!" resistance.
Body of Christ missional identity	Church viewed strictly as family	"It doesn't feel like a family anymore" complaints.

From Experts to Specialists

Churches don't want "experts" who dictate solutions. They want specialists—leaders who put the assessment up front, step to the congregation's side, and guide them in interpreting their own internal reality.

DISCUSSION & REFLECTION – SECTION 9

1. What "404 file not found" error messages consistently pop up when your church attempts new initiatives?

2. How does shifting from an "expert" to a "specialist" alter clergy's authority?

SECTION 9 (CONT.): THE FOUR PRIMARY OPERATING SYSTEMS

Two core axes define a church's operating system: **Theological Perspective** (Conservative vs. Progressive) and **Flexibility** (Settled vs. Adaptable).

Quadrant	Cultural Typology	Core Strengths & Shadow Side
Conservative / Settled	Hearth & Home (Element: Earth)	Strengths: Stable, secure, dependable guardian of core truths. Shadow: Rigid, controlling, fortress mentality, elder-brother syndrome.
Progressive / Settled	Paraclete (Element: Water)	Strengths: Warm, compassionate, hospitable haven for healing. Shadow: Overly sentimental, boundary-less, "onion syndrome" (all tears).
Progressive / Adaptable	Magi (Element: Wind)	Strengths: Rational, intellectual, justice advocate, open inquiry. Shadow: Aloof, cold, theoretical, overly reliant on reason over emotion.
Conservative / Adaptable	Experiential (Element: Fire)	Strengths: Lively, experiential, innovative messaging, conversion-focused. Shadow: Shallow, unpredictable, chasing religious highs without roots.

Each culture possesses powerful gifts for ministry. However, if a culture's shadow side remains unaddressed, it inevitably sabotages organizational vitality.

DISCUSSION & REFLECTION

1. Which of the four operating systems best describes your congregation's primary culture?

2. How has your system's "shadow side" manifested in past ministry efforts?

SECTION 9 (CONT.): THE ORGANIZATIONAL DEAD ZONES

Just as cell phones lose signal in geographical dead zones, there are specific locations on the culture matrix where no ministry programs run successfully.

The Dead Zones: Deeply Settled Systems

Churches located in the deeply settled extremes of both Conservative and Progressive quadrants exist in organizational **Dead Zones**. In these zones, less than one-third of members are satisfied, and over half are merely going through the motions.

- **Deep Conservative-Settled ("Hospice"):** Values clarity over tolerance; differences trigger severe, intractable conflict.
- **Deep Progressive-Settled ("ICU"):** Values individual freedom without accountability, creating stagnant corporate malaise.

Churches in the Dead Zone insist on reaching new members, yet their operating systems physically reject the changes required to do so. Newcomers quickly sense the de-energized environment and leave, leaving the church trapped in decline.

Recognizing that a congregation is in the Dead Zone is not a sentence of death—it is the essential, liberating truth that invites deeper spiritual repentance and structural renewal.

DISCUSSION & REFLECTION

1. Is your church dangerously close to the "Hospice" or "ICU" dead zones?

2. What specific flexibility mechanisms can your leadership introduce to move out of a settled dead zone?

SECTION 10: IMPLICIT PATTERNS & PEER BENCHMARKING

While snapshots provide basic data, organizational intelligence acts as an X-ray to reveal underlying **Implicit Patterns**—relational dynamics that cannot be detected through count data alone, are difficult to see in town halls, and carry deep long-term implications.

Three Dominant Implicit Lenses

- 1. Clergy-Focused Churches:** Member evaluations of the entire church (hospitality, education, facility) are determined completely by how they feel about the clergy. For members who like the clergy, education is world-class; for those who dislike the clergy, education is dismal or lacking. Strategic plans that ignore the pastoral relationship in a clergy-focused church will fail entirely.
- 2. Power-Focused Churches:** Member satisfaction hinges on whether they trust the lay leadership hierarchy, believe leaders represent them, and feel decision-making is transparent. Expanding programs yields zero morale gain if members feel excluded from decision-making due to a lack of transparency or representation.
- 3. Ministry-Focused Churches:** Satisfaction is driven directly by the quality and support of core programs (worship, education, mission). These systems are less volatile than clergy-focused churches, though they turn more slowly.

Pastoral Mismatch Risks

A ministry-focused pastor called to a clergy-focused church will be frustrated when members care little for program excellence and demand personal connection. Conversely, a clergy-focused pastor in a ministry-focused church will be stymied by slow, committee-driven decisions.

DISCUSSION & REFLECTION — SECTION 10

1. Is your church primarily Clergy-Focused, Power-Focused, or Ministry-Focused? On what evidence do you base this?

2. How does knowing your church's primary focus protect a new pastor from early missteps?

SECTION 10 (CONT.): THE POWER OF PEER BENCHMARKING

Without an external reference point, leadership boards make severe errors—either over-reacting to minor issues or under-reacting to fatal trends.

Peer Awareness Case Study: St. Anywhere

During a board meeting, members debated two survey statistics:

- **20% of members** indicate they are merely going through the motions.
- **25% of members** are disturbed by the level of conflict.

Without peer benchmarking, the board assumed 20% apathy was a crisis and 25% conflict was "just normal church life."

With peer benchmarking, they discovered that 20% apathy placed them in the **top 10% most energized churches nationally**, while 25% conflict placed them in a dangerous risk tier requiring immediate intervention.

The Value of External Benchmarks

Peer benchmarking functions like child development charts. It prevents leaders from comparing their church to unrealistic ideals, providing precise comparative context.

- **Identifies True Anomalies:** Separates normal congregational friction from systemic crisis.
- **Validates Local Strengths:** Confirms areas where the church excels compared to regional peers.
- **Guides Resource Allocation:** Directs board energy to areas where the church trails national norms.

DISCUSSION & REFLECTION

1. Why is internal intuition an unsafe guide for determining if conflict levels are acceptable?

2. How can benchmarking against regional peers encourage a discouraged leadership board?

SECTION 10 (CONT.): OPERATIONAL ADVANTAGES

By integrating count data, witness data, implicit patterns, and peer benchmarks into an evidence-based discernment framework, leadership teams gain extraordinary operational advantages.

1. Targeted Strategy

Identifies strategies most likely to succeed in a specific organizational culture.

2. Optimal Pastoral Fit

Guides search committees to call clergy whose gifts match the church's true lens.

3. Conflict Resolution

Depersonalizes debates by projecting objective member feedback onto a single screen.

4. Leadership Freedom

Frees board energy from debating facts to prayerful, creative imagination.

5. Early Warning Systems

Spots underlying entropy and relational drift years before it impacts financial giving.

Equipped with clear organizational intelligence, congregations move from reactive survival into purposeful, missional stewardships.

DISCUSSION & REFLECTION

1. Which of the five benefits above would yield the immediate impact for your board?

2. How does depersonalizing conflict through objective data protect relationships on the board?

SECTION 11: PASTORAL TRANSITIONS & SUCCESSION PLANNING

Psychologist Lawrence LeShan discovered that terminally ill cancer patients achieved remarkable long-term remissions when invited to design a life "tailored" specifically for them—igniting immune-mobilizing zest and purpose.

Moving Beyond One-Size-Fits-All Succession

Our church systems often treat all pastoral transitions with standardized, "off-the-rack" procedures—insisting on mandatory 18-month interim pastorates regardless of local context.

Tailored Transitions vs. Standardized Models

Standard Model: Assumes all transitions are acute grief passages requiring long interim processes.

Tailored Model (OI-Driven): Evaluates empirical risk and opportunity metrics to determine whether an interim is mandatory or if a church is ready for direct succession.

Key Succession Risk & Opportunity Metrics

- **Involvement & Giving Trends:** Will member giving and participation rise or drop during transition?
- **Volunteer Availability:** What percentage of members are ready to assist with transitional tasks?
- **Comfort with Departure Timing:** Are members comfortable with the outgoing pastor's timeline?
- **Role Expectation Shifts:** Do members expect the next pastor to duplicate the former pastor's exact role?

DISCUSSION & REFLECTION — SECTION 11

1. Why can applying a standardized 18-month interim process be damaging to a healthy, forward-looking church?

2. What metrics should a search committee review before determining transition timelines?

SECTION 11 (CONT.): TRANSITION PROFILES & WARNING SIGNS

Comparing a church's transition metrics against national peer benchmarks reveals clear profiles indicating whether an interim clergy is required.

Comparing Opportunity and Risk Profiles

Transition Metric	High-Risk Profile (Interim Required)	High-Opportunity Profile (Direct Call Ready)
Comfort with Departure Timing	16% Comfortable (Severe grief/grief denial)	90% Comfortable (Healthy closure)
Desire for Same Clergy Roles	95% Demand Same Skills (Cloning attempt)	Low Demand for Same Skills (Ready for new gifts)
Member Giving Projections	11% Expect to Decrease (Financial risk)	27% Expect to Increase (Financial strength)
Volunteer Availability	Low Availability to help with tasks	50%+ Available to assist transition

Case Study: The Unintentional Interim

A congregation with a 0th-percentile rating in departure comfort bypassed an interim and called installed clergy immediately. Trapped in grief and attempts to clone the former pastor, the system rejected the new clergy, who departed within two years. The new clergy became an "unintentional interim" at massive emotional and financial cost.

DISCUSSION & REFLECTION

1. How does departure comfort act as a bellwether indicator for transition planning?

2. What are the financial and emotional costs of an "unintentional interim"?

SECTION 11 (CONT.): SPECIFYING PASTORAL FIT

Search committees frequently choose candidates based on personal chemistry during interviews. Relying on chemistry alone ignores organizational fit, yielding high failure rates.

Five Parameters of Empirical Pastoral Fit

1. Subject Matter Interest

Alignment with the theological, size, and cultural interests of the church.

2. Contextual Comfort

Comfort with community growth rates, income levels, and church vitality state.

3. Critical Success Abilities

Specific skill sets matching the church's top critical success factors.

4. Leadership Style Match

Matching the church's required style (Direct provider vs. Team manager vs. On-stage preacher).

5. Core Motivation

Intrinsic alignment with the long-term work required by the specific congregation.

When search committees utilize behaviorally-based interview techniques anchored in clear organizational intelligence, candidates and congregations achieve sustainable, fruitful matches.

DISCUSSION & REFLECTION

1. Why is interview "chemistry" an unreliable predictor of pastoral longevity?

2. How can your search committee embed the five parameters above into candidate evaluations?

SECTION 12: PASTORAL START-UP & EARLY TRAJECTORY

The third phase of succession is the Start-Up plan. Arriving clergy face steep learning curves—learning names, family connections, communication channels, and power structures under high scrutiny.

Winning the "People on the Fence"

In a typical start-up, congregational sentiment breaks down predictably:

- **50% Highly Positive:** Will support the new clergy regardless.
- **10% Resolutely Dissatisfied:** Unlikely to be won over regardless of action.
- **40% Sitting on the Fence:** Unstable position; small signals move them to support or withdrawal.

Targeted Early Preaching & Action

By reviewing assessment data upon arrival, a new clergy identifies the exact drivers concerning those on the fence (e.g., adult education flexibility, lay gift development, pastoral care responsiveness). Touching on these specific themes in early sermons and announcements signals immediate awareness, winning the fence-sitters early.

Sidestepping the Urgent-but-Unimportant: Assessment data also tells new clergy what *not* to spend capital on—enabling them to defer non-critical demands (e.g., immediate hymnal replacements) to focus on primary vitality drivers.

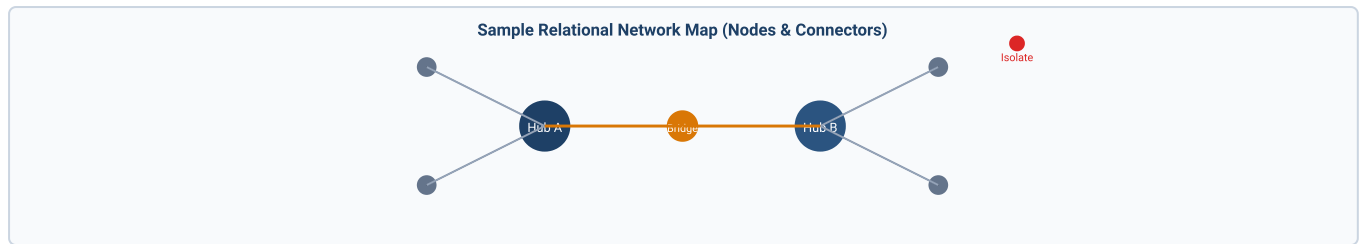
DISCUSSION & REFLECTION — SECTION 12

1. How can a new clergy win the 40% "on the fence" during their first 90 days?

2. Why is strategic deferment essential for a new pastor's survival?

SECTION 12 (CONT.): MAPPING RELATIONAL NETWORKS

Relationships—not organizational charts—determine how work gets done in a congregation. Software mapping tools allow new pastors to visualize informal relational structures immediately upon arrival.



Five Primary Network Maps

- **Structure Map:** Overview of all interconnecting relationships.
- **Isolates Map:** Members with zero indicated relational connections (high risk of leaving).
- **Bridges Map:** Key individuals who connect distinct subgroups together.
- **Islands Map:** Clustered subgroups totally disconnected from the main body.
- **Central Figures Map:** The highly influential core leaders whom members consult for advice.

DISCUSSION & REFLECTION

1. How does identifying "Bridge" leaders help a pastor navigate congregational politics?

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2. Why is identifying "Isolates" crucial for member retention?

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SECTION 12 (CONT.): THE FIRST 30 MEALS OUT STRATEGY

Armed with a Central Figures Map, a new pastor doesn't have to guess who holds informal influence. They can execute a structured "First 30 Meals Out" strategy during their first 90 days.

Executing the 30 Meals Plan

The pastor systematically schedules lunch or coffee with the top 30 central figures (formal board leaders and informal influencers identified on network maps).
Goal: Build authentic personal relationships, listen to their dreams for the church, and establish trust before major strategic changes are proposed.

Reframing "I'm Not the Only One Who Feels This Way"

New pastors are frequently visited in their first weeks by vocal individuals claiming to represent "a silent majority" demanding immediate changes.

By cross-referencing assessment data and network maps, the pastor can evaluate whether the visitor is a central figure representing broad sentiment, or an isolated voice projecting personal grievances. This allows the pastor to provide compassionate pastoral care without being derailed by vocal special interests.

DISCUSSION & REFLECTION

1. How does executing a structured "30 Meals Out" plan anchor a pastor's relational capital early?

2. How does objective network data protect a pastor from vocal special-interest pressure?

SECTION 13: INSPIRATION, CREATIVITY, & MEANING

Information can be grouped in two fundamental ways: by **Cause** (empirical analysis, cause-and-effect data) and by **Meaning** (synchronicity, spiritual discernment, pattern convergence).

Two Ways of Grouping Events

Grouping by Cause: Evaluates satisfaction drivers, fiscal data, and operational factors to determine effective methods.

Grouping by Meaning (Synchronicity): Connects convergent events—scripture passages, coincidental meetings, community needs—that disclose divine timing and purpose (e.g., Queen Esther: "for such a time as this").

Integrating Both Eyes of Discernment

Relying solely on cause produces cold, mechanical agility; relying solely on meaning produces ungrounded, mystical speculation. True wisdom weaves both together:

- **Organizational Intelligence (Cause):** Functions like a stethoscope—listening to heart rates and diagnosing structural realities.
- **Inspired Imagination (Meaning):** Exercises the cardio-vascular system—engaging spiritual vision to transform reality.

Assessment data creates a heightened psychological state that opens the soul to fresh divine meaning, lifting leaders out of operational ruts into multi-dimensional discernment.

DISCUSSION & REFLECTION — SECTION 13

1. Can you recall a time in your church's history when events grouped by "meaning" pointed to clear divine timing?

2. How does balancing empirical data with spiritual reflection prevent "analysis paralysis"?

SECTION 13 (CONT.): PRACTICAL QUESTIONS ON DISCERNMENT

Integrating empirical tools with spiritual practice raises several common operational questions:

Q: Can a church bear fruit if members are unhappy?

A: No. Data shows dissatisfied churches consistently deliver poor worship, weak formation, and inward self-absorption.

Q: Can small churches achieve high vitality?

A: Absolutely. Vitality is driven by purpose and relationships, not headcount. 25 people in a storefront can exhibit top-tier energy.

Q: Why aren't financial metrics enough on their own?

A: Financial trends are *downstream* indicators—lagging behind morale shifts by 2-3 years. Relying on finances alone means reacting after damage is done.

By measuring member witness early, leadership teams catch spiritual and operational drift while the congregation retains full capacity to adapt and flourish.

DISCUSSION & REFLECTION

1. Why is financial tracking an insufficient "early warning system" for church vitality?

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2. How can small churches leverage their size to achieve high satisfaction rates?

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SECTION 14: OVERCOMING COMMON OBJECTIONS

Introducing evidence-based discernment frequently triggers predictable institutional objections.

Addressing Common Objections

- 1. Technology & Feedback:** Printing presses revolutionized the 15th century church's ability to speak. Digital tools now allow the church to fulfill James 1:19—becoming "quick to listen" as well as quick to speak.
- 2. "Discernment by Survey":** Assessment does not replace leadership. A commander issues orders regardless of people's state; an incarnational leader begins where people actually are to lead them forward.
- 3. "You Can't Measure Feelings":** While you cannot measure feelings like dollars, members can bear witness to their emotional and spiritual state using symbolic scales (like medical pain charts).
- 4. "Consumer-Driven Focus":** Research proves high-satisfaction churches are the least self-absorbed, devoting significantly higher energy to external mission and justice than low-satisfaction churches.

5. Faithfulness vs. Success

Churches are called to be both faithful and fruitful. When faithful efforts yield withered fruit, good sense requires re-evaluating methods rather than hiding behind empty rhetoric.

DISCUSSION & REFLECTION — SECTION 14

- 1. Which of the objections above is most commonly voiced in your church leadership?**

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- 2. How does framing assessment as "incarnational listening" answer fears of survey-driven leadership?**

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SECTION 14 (CONT.): FOCUSING STRENGTHS & REGIONAL ROLES

6. Strengths vs. Weaknesses: Assessment does not fixate on flaws. It identifies reservoirs of energy to fuel strength-based growth. However, strengths must align with critical success factors—building strengths that ignore primary dissatisfiers yields zero progress.

7. "I Already Know My Church": Regional executives and pastors often possess keen intuition. However, using objective assessment data depersonalizes feedback, allowing leaders to invest their influence on strategy rather than defending their diagnosis.

Excellence in the Kingdom

No organization in the world should outperform the church in offering belonging, purpose, and hope. Pleading for exemption from accountability sentences congregations to unnecessary malaise.

DISCUSSION & REFLECTION

1. How does aligning congregational strengths with critical success factors prevent wasted effort?

2. Why should the church maintain higher standards of operational accountability than commercial enterprises?

SECTION 15: INFORMATION SEEKING & ORGANIZATIONAL STAGES

The type of information a church collects defines its organizational stage, acting as a filter that determines what is visible and what is invisible to leadership.

Four Stages of Information Maturity

Leadership Stage	Primary Values & Context	Information Sought	Crisis Point
1. Instrumental	Loyalty, position, command & control.	Count Data (Members, dollars, facilities).	Fails when adherents have choices and leave.
2. Generalizing	Affiliations, corporate memory, small bodies.	Conversational Data generalized across all.	Fails in larger, diverse, fast-changing bodies.
3. Neural	Buy-in, broad input during transitions.	Episodic Assessments (Symbolic narrative).	Fails when data floods cognitively ("Analysis Paralysis").
4. Integrating	Transparency, learning culture, best practices.	Systemic OI Narrative & benchmarking.	Continuous system learning and adaptation.

A church locked in the Instrumental stage is completely blind to plummeting morale until financial collapse occurs. Shifting to an Integrating stage makes member experience visible, creating a learning system.

DISCUSSION & REFLECTION – SECTION 15

1. At which of the four information stages does your church currently operate?

2. What steps are required to move your board from Generalizing to Integrating?

SECTION 15 (CONT.): FILTERS AND SYSTEM RETENTION

Information filters directly dictate member retention:

Instrumental & Generalizing Filters

Attract and hold members who value institutional loyalty, tradition, and political access. Bleeds out young adults and newcomers who seek functional impact.

Neural & Integrating Filters

Attract and hold members who value transparency, engagement, and personal growth. Bleeds out those who prefer passive spectatorship.

When congregations complain that they cannot retain young families, the root cause is almost always an information filter locked in the Generalizing stage—painting over the distinct needs of younger cohorts with an informal, veteran-dominated brush.

DISCUSSION & REFLECTION

1. How does an informal "grapevine" filter inadvertently exclude younger generations?

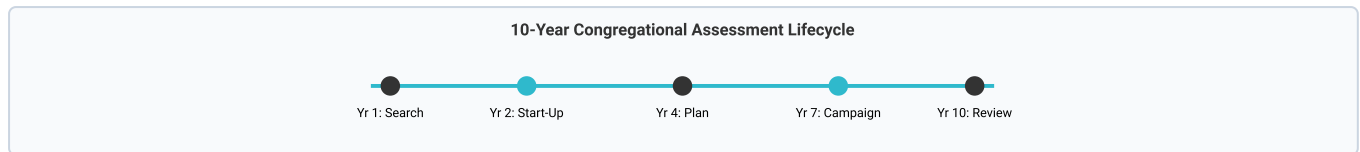
2. How does systematic assessment create a welcoming environment for newcomers?

SECTION 16: EMBEDDING THE OI FUNCTION

Fifteen years ago, asking "Who does your church's IT?" brought blank stares. Today, every congregation relies on designated IT personnel. Every congregation over 100 in worship requires an embedded **Organizational Intelligence (OI) Function**—a designated volunteer or staff member tasked with tracking member witness data systematically.

Why an Embedded OI Function is Essential

- **Requires Specific Gifts:** Comfort with basic statistics, servant orientation, and gift for constructive feedback.
- **Ensures Consistency:** Replaces scattered, uncoordinated "survey fatigue" with coordinated quarterly check-ins.
- **Longitudinal Tracking:** Tracks progress over time, constructing a 10-Year Intelligence Narrative.



DISCUSSION & REFLECTION — SECTION 16

1. Who in your congregation possesses the gift mix to serve as your embedded OI Coordinator?

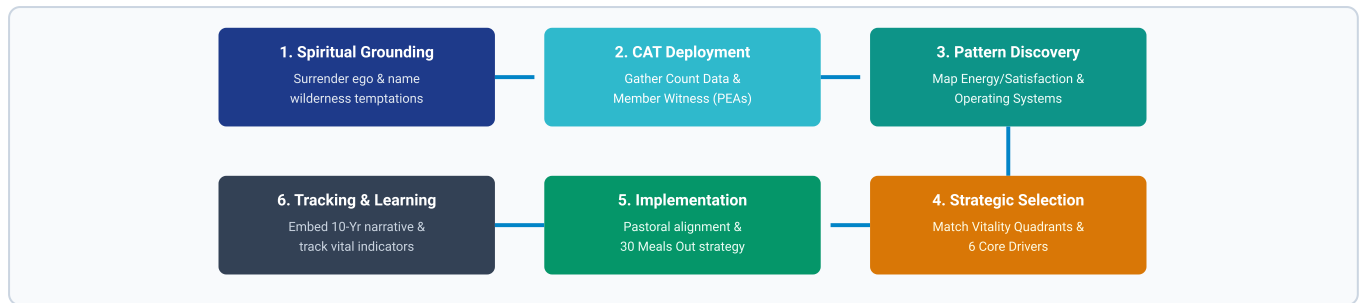
2. What step will your leadership take this month to begin your evidence-based discernment journey?

SECTION 17: PROCESS BREAKDOWN FRAMEWORK

EVIDENCE-BASED DISCERNMENT IMPLEMENTATION MODEL

The Congregation Assessment Tool (CAT) facilitates a shift from opinion-driven decisions to evidence-based discernment by gathering quantitative count metrics alongside qualitative member witness data.

PROCESS FLOWCHART: THE SIX DISCERNMENT PHASES



PHASE 1: SPIRITUAL PREPARATION & GROUNDING

Core Objective: Prepare leadership and congregation to receive objective feedback without deploying natural defense mechanisms (Shame, Denial, or Blame).

- **Name Corporate Temptations:** Acknowledge risks of *Institutional Hunger* (survival focus), *Tactical Short-Cuts* (savior pastor trap), and *Transformational Naïveté* (ignoring conflict).
- **Anchor in Spiritual Practice:** Base board meetings on prayer, Scripture reflection, confession, and peace.
- **Commit to Transparency:** Share total diagnostic results openly across the congregation.

PHASE 2: ASSESSMENT DEPLOYMENT (CAT SURVEY)

Core Objective: Capture representative data covering physical metrics and member witness (Perspectives, Experiences, and Aspirations - PEAs).

1. Objective Count Data

Attendance numbers, age distributions, pledge totals, square footage, and program participation rates.

2. Subjective Witness Data

Overall satisfaction (Shalom), engagement energy, worship evaluation, governance trust, and strategic priorities.

SECTION 18: ANALYSIS, IMPLEMENTATION & ACTION WORKSHEET

Interpret assessment results against regional peer benchmarks to map vitality, operating systems, and implicit patterns.

Vitality Quadrant	Energy Level	Satisfaction Rating	Primary Operational Focus
Transformational	High (Top 15%)	High (70%+)	External Mission, Delegation & Multiplication
Static	Low	High (70%+)	Fellowship, Comfort & Bypassing Stuck Structures
Recovery	Low	Low (< 70%)	Healing, Resetting Discipleship Basics & Trust
Chaotic	High	Low (< 70%)	Establishing Boundaries, Union Negotiation & Alignment

Identify Culture Type

Determine if culture is *Hearth & Home*, *Paraclete*, *Magi*, or *Experiential*, noting any "Dead Zone" risks.

Uncover Dominant Lens

Discover if member experience is primarily *Clergy-Focused*, *Power-Focused*, or *Ministry-Focused*.

PHASES 4–6: STRATEGY, IMPLEMENTATION & LEARNING

Phase 4: Focus on the 6 Core Drivers (Worship, Learning, Formation, Governance, Relationships, Flexibility).

Phase 5: Embed the 5 parameters of empirical fit & execute the "First 30 Meals Out" plan with bridge leaders.

Phase 6: Appoint an OI Coordinator to maintain a 10-Year Narrative Track across pastoral transitions.

LEADERSHIP REFLECTION & ACTION WORKSHEET

1. Where on the Energy-Satisfaction matrix do you believe your church currently resides? On what evidence do you base this?

2. Which of the six core drivers of vitality requires the most immediate attention in your current context?

3. What specific action step will your leadership team take this month to transition toward evidence-based discernment?