

How to Accomplish Effective Congregational Planning

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Church committees, ministry teams, clergy, paid staff, and volunteer leaders serve in feedback-poor environments:

1. Oral feedback from 5 percent of church members, while it may contain some accuracy, comes across in such a critical and sometimes downright hostile manner that clergy, staff, and lay leaders often discount its accuracy.
2. Oral feedback from 10 percent of church members omits many accurate and helpful observations in favor of “accentuating the positive” and hoping negative behaviors will improve without their feedback.
3. Oral feedback from 85 percent of church members is either nonexistent or ambiguous, as people remark to one another, “I just don’t feel like it is my place to say anything.”

These pages contain a congregational planning process designed to positively address that feedback vacuum. The procedure is based on Herb Miller’s more than 700 on-site consultations with congregations in 25 denominations across the United States, Canada, and Australia during the last three decades.

The term “Appreciative Inquiry” describes this Congregational Planning Process:

Identify and appreciate our congregation’s present strengths.

Dream of how we might build on these strengths.

Examine and prioritize action-possibilities for building on our strengths.

Act on selected action-possibilities to create a stronger future.

This Congregational Planning Process provides a one-year timeline for discovering, dreaming, deciding, and doing. A Congregational Planning Team appointed by our church’s governing board leads our various committees, ministry teams, clergy, paid staff, and lay leaders in experiencing themselves into new awareness, insights, and action directions.

To insure that the Congregational Planning Process becomes more than an intellectual exercise in which participants gain insights but do not take action, remember these facts:

1. Information on paper does not equal transformation in congregations. Knowing does not equal doing.
2. Building on present strengths only occurs in the presence of strong motivation. Unmotivated people tend to resist insights and actions that could propel them in new directions.
3. The strong motivation that enhances a congregation’s strengths rarely happens by reading a book; by attending a single meeting, seminar, workshop, or event; or by taking a survey.
4. The motivation-building process that leads to enhancing congregational strengths more often arises through a lengthy period of study, discussion with other respected persons, testing ideas, and refining procedures through experience.

Preparation: The congregation's governing board appoints a special task force to act on its behalf during the next twelve months, comprised of six respected laypersons and the pastor. A good selection formula for this Congregational Planning Team: two people above age forty, two people under age forty, two adults who became members within the last three years, and the pastor. *Warning:* No matter how small or large their number of active leaders, congregations get far better results by appointing this special task force than by handing this material to any pre-existing group in the congregation, such as the governing board or a committee.

Step #1: The first meeting of our Congregational Planning Team occurs during *the week following* the Sunday in which people complete the "Personal Opinion Survey for Morning Worship Attendees" (photocopied from the last two pages in this resource).

This first meeting of our Congregational Planning Team (but *not* subsequent meetings) includes all committee chairpersons, ministry team coordinators, and paid staff members. Prior to this first meeting, the Congregational Planning Team chairperson uses two procedures with the stack of "Personal Opinion Survey for Morning worship Attendees" sheets:

- (a) The chairperson tabulates the check marks on the front of the survey sheet (items #1, #2, #3, and #4). This tabulation provides an overall photograph of how the congregation's worship attendees view several aspects of its personality.
- (b) The chairperson sorts the sheets into age-range stacks—one stack for people who checked the age-0-17 blank; one stack for people who checked the age-18-24 blank; one stack for people who checked the age-25-34 blank; one stack for people who checked the age-35-44 blank; one stack for people who checked the age-45-54 blank; one stack for people who checked the age-55-64 blank; one stack for people who checked the age-65-74 blank; one stack for people who checked the age-75-84 blank; and one stack for people who checked the age-85+ blank.

At this first meeting, the Congregational Planning Team and all committee chairpersons, ministry team coordinators, and paid staff sit in a large circle. Starting with the youngest age-range stack (0-17) and proceeding through to the oldest age-range stack (85+), send the sheets around the circle, so that each person reads each survey sheet and passes it along to the next person until everyone has read every sheet. Ask people, as they read the sheets, to make notes and develop a list of three-to-five insights and surprising information items that seem to jump out of what worshipers wrote.

Warning: A few worshipers (usually about 5 percent) make painful comments that can hurt the feelings of some people seated in this circle. Remember that a hypercritical 5 percent is present in *every* congregation. (All clergy and staff understand this "5 percent principle," because they continually hear negative comments from that 5 percent.) It is better to know what this hypercritical 5 percent is thinking than not to know. Even this hypercritical 5 percent occasionally says something of value.

Opinions that 10-to-20 percent of worshipers express provide information of significance that clergy, staff, and lay leaders find beneficial in building on congregational strengths to maximize mission and ministry effectiveness.

After everyone in the circle has read all the sheets, ask each person to read to the group his/her list of insights and information items.

In areas where the Congregational Planning Team sees consensus-insights and surprising information items, team members develop a list of agenda items for subsequent monthly meetings.

Step #2: At its second meeting, the Congregational Planning Team considers how the insights and surprising information items surfaced by the Opinion Survey inform and suggest directions and recommendations for committees and other leadership groups.

Step #3: In preparation for its third meeting, the chairperson of the Congregational Planning Team E-mails goes to www.TheParishPaper.com and downloads the free *Contents-Descriptions: 34 Free Church Effectiveness Nuggets Volumes* document.

At this third meeting, the chairperson distributes a copy of the free *Contents-Descriptions: 34 Free Church Effectiveness Nuggets Volumes* document to each Congregational Planning Team member. The Team discusses, based on consensus-insights and information obtained in the survey, which of these 34 free *Nuggets Volumes* may have value for study by committees and ministry teams in our congregation.

Step #4: At its fourth meeting, the Congregational Planning Team reviews the free *Contents-Descriptions: 34 Free Church Effectiveness Nuggets Volumes* document and selects Volumes that address issues surfaced by a tabulation of the “Personal Opinion Survey for Morning Worship Attendees.” Each *Church Effectiveness Nuggets Volume* comes with copyright permission that allows photocopying of that volume for local use in our congregation.

Step #5: To its fifth meeting, the Congregational Planning Team invites the chairpersons of all appropriate committees and ministry teams and distributes to them sufficient copies for the *Church Effectiveness Nuggets Volume(s)* that apply to their leadership role in the congregation.

The Congregational Planning Team asks each group to study the *Church Effectiveness Nuggets Volume(s)* and prepare to suggest action-plans for implementing the ideas they feel apply in our congregation.

Set a date, probably two-to-three months from now, when our Congregational Planning Team meets with each committee or ministry team to which it delegated one of the *Church Effectiveness Nuggets Volumes*. At that meeting, our Congregational Planning Team receives suggested action-plans from committees and ministry teams and discusses how to move from thinking to doing.

Step #6: The Congregational Planning Team meets monthly for one year to unfold the study, discussion, planning, and action process. The purpose of these monthly meetings is to coordinate efforts of the congregation’s committees, ministry teams, clergy, paid staff, and volunteer leaders in implementing, refining, and perfecting the action possibilities.

Instructions for Administering the “Personal Opinion Survey for Morning Worship Attendees”

Warning: Do not send the Opinion Survey home with people and ask them to bring it back next week. This produces distorted information. Only a handful of people return the sheets, primarily those who are not time-pressured, enjoy filling out such forms, or have a strongly negative opinion about something.

For the same reason, putting the survey in the church newsletter or distributing it by mail produces information distortion. Then, too, if you circulate this type of opinion poll at times other than Sunday morning, approximately 5 percent of the members put their imaginations in overdrive. They manufacture reasons, many of which are inaccurate, for “why the pastor wants this survey completed.” Some of that imagination-run-amuck 5 percent say, “She must be getting lots of complaints.” Such rumors distort feedback data.

Additionally, some people in that 5 percent group telephone one another, expanding the volume of negative rumors. Some such telephone chatterers coach one another on what to write and not write on the opinion survey, thus distorting the data.

Death, taxes, and that 5 percent are always with us. Do not give them the opportunity to distort our results. Use the opinion survey on Sunday morning, in exactly the manner described below.

Warning: Do not announce in the church newsletter the previous week that we will do this opinion survey next Sunday morning. Some people stay home, saying, “We aren’t having regular church today.” Again: data distortion!

Say at announcement time, “We will complete the worship service ten minutes early today, so we have time to get your opinion on several important matters.”

Remind people, “Please do not take the sheets home with you. Our Congregational Planning Team will meet to study them this week.”

A few people will write on bottom of their survey sheet, “I needed more time to think about these items.” However, the opinions about which people feel most passionate immediately jump into their minds when we ask them to express themselves in the manner prescribed here. That is exactly the information we seek. We want off-the-top-of-the-head, feeling-level responses, not a carefully-crafted term paper.

At the close of the service, before the benediction, say, “After the Amen, please be seated. The opinion survey we’re asking you to complete takes less than ten minutes. We finished worship early today, so that you would have time to help with this. Even if you are a worship visitor, you can contribute valuable insights.”

As the ushers distribute the survey forms, say, “We know some people may object to doing this on Sunday morning. We agree. We would prefer to do it at another time. However, this is the only way we can obtain a large, accurate sampling of opinions. We hope you will understand the necessity of doing it this way.”

That type of statement reduces the number of forms on which people write, “I hate doing this kind of thing on Sunday morning.”

Close your instructions by saying, “Please leave quietly as you finish your sheet, since other people may still be working on theirs. Place your sheet in the boxes at the sanctuary door(s).”

Instructions for using the next two pages: *You do not have permission to change in any manner whatsoever the wording on this copyrighted "Personal Opinion Survey for Morning Worship Attendees." Any alteration of the words is an express violation of United States and International Copyright Law.*

Photocopy the next two pages on the front and back of one sheet of paper, exactly as is. Do NOT photocopy on two separate sheets stapled together.

Personal Opinion Survey for Morning Worship Attendees

Participant Procedure: This survey of morning worship attendees is part of an information-gathering process that will help us determine the directions our church should take to maintain and strengthen effectiveness in every aspect of its mission and ministry.

This survey does not replace the sermon. End the service about 10 minutes early. Distribute the survey sheets after the benediction. Then, worshippers can leave when they complete their surveys.

A quick, feeling-level response is desired, rather than lengthy reflection. Try to complete all of the blanks where you have opinions. Place your survey in the box provided for that purpose as you leave the sanctuary. Do not take it home with you. Please do not sign your name.

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1. This church is (please check one):

- Very friendly
- Friendly
- Polite but distant
- Cool and unresponsive
- Cold and aloof
- Other (please describe)

2. This church is (please check one):

- Energetic and open to new ideas
- Flexible but too rigid on some issues
- Slow moving and resistant to change
- Standing still
- Losing ground
- Other (please describe)

3. I have attended here
(please check one):

- Less than 5 years
- 5 to 10 years
- 10 to 20 years
- More than 20 years

4. My age is (please check one):

- 0-17 55-64
- 18-24 65-74
- 25-34 75-84
- 35-44 85+
- 45-54

5. In my opinion, these are this congregation's three greatest strengths:

A. . . .

B. . . .

C. . . .

--Over, please

6. If you could strengthen our church during the next one to five years by having some of your hopes and dreams come true, what would those be? (You do not necessarily need to write in all spaces—just those where you have strong wishes.)

A. Regarding worship services, I wish:

B. Regarding Christian education ministries, I wish:

C. Regarding congregational fellowship life, I wish:

D. Regarding congregational community service ministries, I wish:

E. Regarding congregational missions/benevolence giving, I wish:

F. Regarding outreach to potential new members, I wish:

G. Regarding staff/ministry, I wish:

H. Regarding financial stewardship, I wish:

I. Regarding church property, I wish:

J. Regarding something else I have wanted to tell someone, I wish:

