

CONGREGATIONAL SELF-ASSESSMENT AND PLANNING RETREAT MODEL

ORIGIN AND CONTEXT

This model was developed by Nancy Bowen and Howell Lind and was included as the second part (option) of the John Buehrens and Larry Peers Congregational Self-Assessment Model.

This model is designed to be a short duration / high intensity explorative Self-Assessment created by the collective leadership of the congregation. It is designed to do the majority of the thinking / processing / choosing of goals, milestones and strategies in a single day retreat. An assessment form is provided and can be filled out by all participants ahead of time in order to stimulate thinking.

This model tries to use a basic premise of appreciative inquiry by identifying success and looking for ways to build upon the decisions / actions that brought it about. This process tries to accomplish some of the same objectives of the more comprehensive Congregational Self-Assessment model in less time. There is some follow up work involved to insure that initiatives are carried forward.

This model is ideal for a congregation that wants to incorporate congregational assessment into an annual leadership or congregational retreat. Included in this section is the suggested process for a one-day congregational self-assessment and planning retreat and the short congregational self-assessment form that can be used to stimulate ideas for leaders coming to the retreat.

This model is designed to measure the general health of the congregation with the intent of identifying goals and objectives that will be supported by the congregation.

This model is used, ideally, when a congregation wants input from the major congregational stakeholders but doesn't want deliberation to carry on over time. It is designed to be successful with a high turn out, high intensity process for a short duration. Insights and outcomes of this retreat can be useful for staff, board members and those on the committee on ministry who are working on meta-level organizational / strategic planning. This might be ideal for an assessment when a new minister arrives and the intent is to activate congregational leaders and give the new minister a deeper understanding of the aims of the stakeholders.

BENEFITS OF THE MODEL

- Short time frame
- Get input from a great number of people
- Because of the broad participation and the depth of the exploration, the results have a tendency to be compelling / exciting.
- Focuses on the systemic health, ie. the strengths, abilities, focus and passion of the whole rather than reporting on the strengths, abilities, focus and passion of a few people.
- Has the aim of naming and building on strengths and ideals.

CHALLENGES OF THE MODEL

- Requires a fairly high energetic, intense plea for people's attention / participation.

- Because it is a one day event, there will always be key people who won't be able to attend whose buy-in will be needed later.
- Requires follow up to incorporate findings into action plans and an intentional process to incorporate and monitor those plans in the future

PROCESS

Congregational Self-Assessment Retreat Agenda

9:00 **Worship**

9:15 **Introductions**

9:30 **Present the focus for the day:**

- _ Purpose: Why is our congregation here?
- _ Vision: Who are we and how do we want to be?
- _ Mission: What shall we do?

10:30 **Start small group discussions:**

With the purpose, vision and mission conversation in mind divide into small groups to brainstorm possibilities for the coming year. The procedure below can be used or adapted:

Step One:

Choose a congregational area for each group to consider. Break the whole group into small groups. Each group will focus on one area of congregational life. A small congregation might consider these categories:

- _ Program (worship, religious education, new members, fellowship)
- _ Organizational (canvass, bylaws, capital campaign, structure)
- _ Outreach (evangelism and social justice)

A larger congregation might use standing committee categories. The composition of the small groups should not be by committee membership, however.

- _ Religious Education
- _ Social Justice
- _ Membership
- _ Building and grounds
- _ Sunday services
- _ General administration

Step Two:

Discuss the area of congregational life within the small group. Within each small group on a topic area, each small group discussion could consider any of the following questions:

1. What is the most exciting thing we have done this year in this area?
2. What strengths does it demonstrate?
3. How can we build on that strength?
4. What input from the congregational assessment form (if used) can inform our discussion?
5. What would you like to see in this area this year?

Step Three:

Brainstorm ways to act on the insights gained from the small group discussion. Following, the small group discussion, the group should brainstorm ideas for strengthening or building upon this area of congregational life. When brainstorming, ideas are generated without comment or judgment within a specified amount of time.

Step Four:

Choosing and developing ideas for action within. Once the small group has brainstormed a list of ideas, then, the small group should choose three ideas it wants to develop further. For each of the three ideas the group has chosen, the group will then develop a plan on newsprint for each idea by asking:

1. Can this be accomplished in a year? Is this a goal for next year?
2. What timeline is reasonable if it is to be accomplished?
3. Who might be interested in making this happen?
4. Is there a budgetary consideration for the projects in this area?
5. What recommendations can we make about the budget for these projects?

12:00 Plans are posted and the whole group votes.

Small groups post the newsprint with their developed ideas on the wall for everyone to review. Give everyone 5 colored dots with which to vote for their favorite ideas. In voting for an idea or project, a participant is not promising to personally do what he or she votes for—he or she is only promising to be enthusiastic and supportive of this project proceeding. Vote during the lunch break.

12:15 Lunch and Fellowship Time

Facilitator and subcommittee count the votes during lunch in order to present to the group the 4 or 5 ideas or projects that received the most support.

1:15 Report the vote and then establish new small groups.

The groups can be self-selecting or random: (a) Option one: Self-selected groups. Ask participants to form a group with others interested in developing further one of the 4 or 5 ideas or projects that received the most support. If a group does not form to develop a specific idea, then this is an indication that there is not enough support or interest to proceed with this idea or project. (b) Option two: Random Groups. You may want to number off so that participants are asked to work on goals for which they did not vote.

1:30 Small groups develop action plans for the top priorities.

Each small group works on developing a plan for an idea more fully. In the discussions and plan, the small group may want to indicate:

- The current strength that you are building upon
- The initial action steps
- A timeline for completion in one year
- What communication with other committees or groups is planned
- Who will take primary responsibility for an action (staff, committee, or individual)

- What will you need to stop doing in order to accomplish this task?
- Barriers to accomplishing the goals that you can discern.
- Strategies you have for addressing these barriers.
- How you will evaluate and monitor this project.

3:00 Small groups report their action plans and the whole group discusses them.

Each small group presents its plan to the whole group. After, the plans are presented the whole group of participants should consider the following questions:

1. Do any of the plans seem too ambitious to accomplish?
2. Is each plan accomplishable in a year?
3. If not, can the plan be distributed over a two year period? If so, what are the actions that are possible during this first year?

After the discussion of the plans, it is advisable that the whole group determines the top three plans that it is willing to commit to for this next year.

3:30 Accepting responsibility for the plans accepted as priorities.

Ask the following questions:

1. Who (which individual or group) will accept responsibility for the first step and by which date?
2. What will the Board need to do to support these new initiatives?
3. How will honoring these priorities shape the work of the committees and the Board?
4. Is there anything that Boards or committees need to stop doing in order to accomplish these priorities?
5. Who needs to be informed about these priorities?
6. How, when and by whom will these goals be communicated with the congregation?
7. Who on the board will be the liaison for each of these initiatives?

If the initial round of questions falls short on answers go to the next goal and ask the same questions. If one or more goals engenders no energy or commitment you may drop this goal or refer it to the appropriate committee for their reaction and response. Ask, "If the committee doesn't want to pursue this goal, does the Board want to advocate for it?"

4:00 Closing Comments.

Include a time for sharing the "joys and concerns" for the day.

4:15 Closing worship

You may also want to include a printed evaluation form for participants to write their comments.

CONGREGATIONAL SELF-ASSESSMENT FORM

For the following statements, please circle the appropriate number. Your response in the left hand column is your assessment of our congregation. Your response in the right hand column indicates how important this item is to you personally. The results of this assessment can inform your congregation's annual planning retreat.

**HOW IS OUR CONGREGATION DOING?
ME?**

(5) Strongly Agree

(4) Agree

(3) Neither Agree nor Disagree

(2) Disagree

(1) Strongly Disagree

1 2 3 4 5

**HOW IMPORTANT IS THIS TO
ME?**

(5) Very Important to Me

(4) Important to Me

(3) Neither Important nor
Unimportant

(2) Relatively Unimportant to Me

(1) Not Important to Me at All

5 4 3 2 1

A. Our congregation has a sense of community, caring, warmth, friendliness, supportiveness, et cetera.

B. Our congregation warmly and openly welcomes visitors and newcomers.

C. Our congregation has good morale: members are interested in our congregation and their fellow members.

D. Our congregation provides an opportunity for an individual's spiritual journey and growth.

E. Our congregation's community forums, social justice initiatives, book discussions, and new members classes are varied and worthwhile.

F. Our children's religious education program provides a rewarding experience for our children.

G. Our adult religious education program provides a rewarding experience for our adults.

H. The overall format of the Sunday service is good.

I. The overall quality of out Sunday services is good.

J. The overall quality of the music programs for our Sunday services is good.

K. Our congregation has an interesting variety of social activities and events for members to get together.

L. Our congregation is aware of and involved in local community affairs and issues.

M. Our congregation shows a concern for national and international issues.

N. Our congregation communicates an awareness and connection to our district and continental UUA

O. Our facilities are adequate for our staff, our congregation and its needs.

P. The present method of raising funds for our congregation is satisfactory.

Please name three things that you like about your congregations:

1. _____
2. _____
3. _____

Please name three things that you think need improvement about our congregation:

1. _____
2. _____
3. _____

[Check one] I am a member of this congregation___, I am a friend of the congregation___.

[Check one] My participation in the worship, events and activities of this congregation is
frequent_____, occasional___, infrequent___.