

## **Jim's Tool Box**

“How Are We Doing? Where Are We Going?”

The questions in the title of this month's Tool Box are suggestive of the kinds of questions that all congregations need to ask from time to time -- actually on a regular basis. There are all kinds of tools and materials that congregations can use to get a handle on how they are doing and where they are going. I want to talk about four of those resources in this article of the Tool Box.

I recently had a call from Carl Spencer who serves as the Administrative Lay Pastor at the Lithopolis United Methodist Church (LUMC). Carl said that a few years ago LUMC used the Church Vitality Indicator (CVI) as a way to gauge the ministry of the congregation and to use the results of the CVI as a tool for strategic planning. Now the congregation wants to continue to explore where God is leading them, and Carl asked me for suggestions for other tools to use for evaluation and strategic planning purposes.

Because of that conversation I decided to write about planning in this issue of *Jim's Tool Box*. In their book *Holy Conversations* (Alban Institute, 2003), Alice Mann and Gil Rendle describe planning as (their title states) “holy conversation.” They write that planning is *conversation* because it truly is dialogue. They describe it this way, “The talk is full of stories, memories, and hopes – the kind of conversation that strengthens and transforms people.” They go on to note that conversation is holy because, at its best, it is about a people's understanding of their identity as a faith community, their sense of purpose, and their relationship with God.” As you can imagine this can really be powerful stuff both for those involved in the conversation and for the ministry of the congregation as well.

### **Holy Conversations**

In fact, Mann and Rendle's book *Holy Conversations* is one resource I would recommend to you if you are entering into a planning process. The book offers a lot of good background on what planning can and should accomplish. It also provides many hands-on tools and exercises that a leader could use with a planning/visioning group or the administrative board for looking at the church and the community around the church. With the purchase of the book comes the right to download most of the resources that can be used with the group as handouts. There is a website in the book from which these handouts can be downloaded.

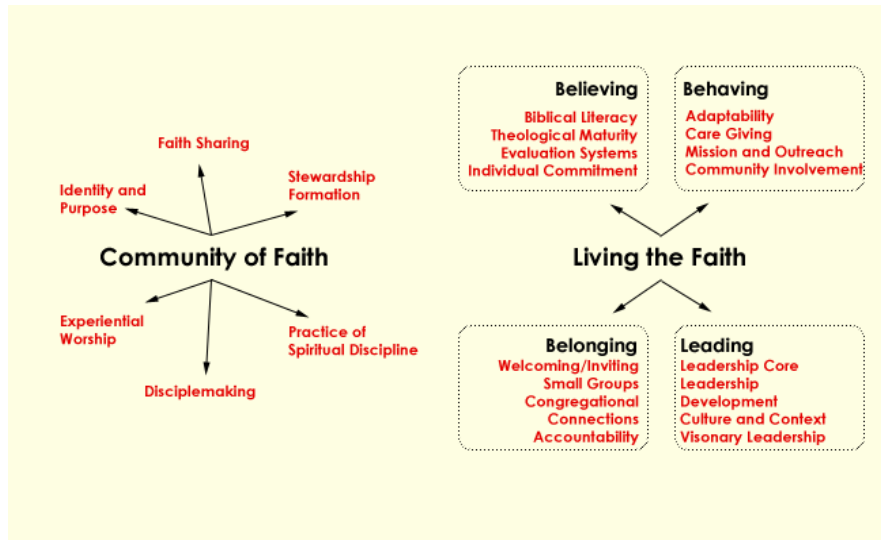
### **Accelerate Your Church**

Another book that I came across recently that is designed to help lead a congregation in a planning process is Tom Bandy's book *Accelerate Your Church 12 Steps to Get Out of the Box...and Beyond*. This book is available as a download from [www.netresults.org](http://www.netresults.org). Click on the “Net Results Store” link to find the book. This book consists of a twelve step planning process. Bandy offers examples and questions to guide the process with the congregation.

### **Church Vitality Indicator**

The Church Vitality Indicator that Lithopolis used is a tool that is available from the General Board of Discipleship website: <http://www.cvindicator.com/>. Both this tool and the one I will mention in the section below consist of congregational surveys that parishioners and leaders can

complete on the web. If folks do not have access to a computer, they can complete a hard copy and someone else can input their responses onto the web. The CVI helps the congregation analyze its strengths around these indicators.



There is a onetime cost to the congregation for the use of the process including the access to the website. According to the CVI website, “The congregation identifies its focus area by combining its two vitality indicators. Leaders will read a description of the vital congregation they can become as they work toward this focus area. They will find planning tools, strategy guides and targeted resources to make major improvements toward new vitality and growth. Leaders can return to the focus area as often as they choose for new resources suggestions and updates.”

According to LUMC Pastor Ben Foulk, the CVI gave the leadership of the congregation a sharper focus about what they already knew about themselves. Ben said that the process focuses on a congregation strengths rather than weaknesses. The emphasis is on the church doing a better job the things that it does well. He said that most congregations will find a cluster of capacities on which they can focus.

### **U.S. Congregational Life Survey**

The U. S. Congregational Survey is another tool that includes the use of congregational surveys and reports that come to the congregation (<http://www.uscongregations.org/index.htm>). In this planning process, parishioners complete a survey on Sunday morning during worship. Each congregation receives a Strengths Report and a Connection Report. The results are compared with the results from 2,000 other congregations and 300,000 respondents who have completed the survey. This survey results (the two reports) can also be used as a planning tool for strategic planning purposes. There is a fee schedule for the use of this survey. Congregations pay a flat fee and then a fee for each survey form that is ordered. The surveys must be sent in to be scored.

### **The Bottom Line**

Any or all of these tools can be useful ways to approach planning (although not all at once). The purpose of all of these in a way is to provoke that “holy conversation” within the congregation.

Those sacred conversations can help move the congregation forward in its mission and ministry. However, the planning results can also become just an expensive bookend or doorstep if the results are not used. The process takes persistence to complete it, but that is only half of the process. The implementation of the results of the work is the real hard work. Putting ideas/visions into reality is the difficult part of the process. It takes bold and courageous leadership often to implement what needs to be done when a congregation takes a look at itself and seeks to move in new directions of ministry.

**How has it been for you?**

Have you found these tools or others to be helpful in your planning process? Send me an email ([jwaugh@wocumc.org](mailto:jwaugh@wocumc.org)) and let me know how it has gone for you. What tools/books/consultant did you use? How successfully have you implemented the results of the study or the planning process?