# CHAPTER 4

# *Process*

## 4.1 Introduction

In congregational studies, process refers to the dynamic interaction between values and events. Process is not what happens, but *how it happens*. It is the link between the identity, values, and commitment of members, and the specific programs which the members attend and support. We have defined process as the underlying flow and dynamics of a congregation that knit it together in its common life and affect its morale and climate.

In defining process, writers in organizational studies usually differentiate between task, structure and process. Task is the content or the goal that a group is trying to accomplish. For example, James Anderson and Ezra Earl Jones say that

> the primary task of the church is faith development. It is to move [the individual member] from a faith dependent upon others through a process of personal search and exploration to a faith that is owned—integral to self identity and freely chosen personal values.[1]

Task has to do with the substance of the organization's life, what it is for, what it does, its purpose. Process has to do with the way the goals are accomplished. In this chapter we will explore several expressions of process, including planning, role clarification, training, support giving, crisis management, and problem solving. In each expression we will be concerned with the formal process, or structure, and with the informal process, which is more hidden and less accessible to review. We begin with an introduction to process and a discussion of data gathering procedures.

Formal processes, or group structures, reflect the overt, agreed upon, and more static elements of the organization:

Written and agreed upon goals.
Approved division of labor and job descriptions.
Authority, responsibility, and accountability at defined levels in the hierarchy.

Edgar Schein says there is another part of organizational life which also must be taken seriously, that which we are calling informal process:

> The network of positions and roles which define the formal organizational structure is occupied by people, and those people in varying degrees put their own personalities into getting their job done. The effect of this is not only that each role occupant has a certain style of doing his work, but that he has certain patterns of relating to other people in the organization. These patterns become structured, and out of such patterns arise traditions which govern the way members of the organization relate to each other. . . . To put the issue another way, the roles which people occupy [a part of the structure] partly determine how they will behave. It is important to have the right structure of roles for effective organizational performance, but at the same time, people's personalities, perceptions, and experiences also determine how they will behave in their roles and how they will relate to others.[2]

Understanding the tension between formal and informal process is essential in congregational studies. Formal process, or structure, refers to the formal, agreed upon, and usually written understandings that the members of a congregation have about congregational procedures such as decision making, delegating responsibility, defining authority, and role differentiation. Informal process, as we will use the term in this chapter, has to do with the procedures that people actually follow, which may be different from what they are authorized to do in the congregation. This tension between the approved procedures (or espoused values) and the common practice makes the study of process essential.

Many informal processes in churches and other organizations are not thought out. They just happen. However, they happen with regularity and predictability. Just because a process has not been formally agreed upon does not mean that a congregation or group does not have a regularized way of proceeding. For example, there may be no policy about how meetings are run

(Leading), but each time the group meets the pattern is much the same: the chair opens the meeting (there is no agenda), asks that the minutes be read, and once they are completed the leader asks what the group wants to talk about, and the conversation wanders wherever the members of the group lead it. The minutes in the next meeting may bear little resemblance to the dialogue that occurs naturally, but everyone also takes that for granted.

An informal process may be just as real to the membership as a formal process and often far more pervasive and permanent. It is simply a process about which the members have not made a conscious decision regarding the way it should be or the way they want it to be. Many informal processes are adequate, sometimes ingenious. Changing what is functioning may waste time at best, or replace a functional process with one that is dysfunctional, increasing frustration and perhaps getting in the way of a smooth-running organization. "If it ain't broke, don't fix it."

However, sometimes informal process inhibits the group or subverts the goals of the membership. Because the informal processes are out of view, if they are to be changed, they must first be "surfaced"—that is, made visible—so they can be observed and evaluated. Then they can be modified. If one tries to change or create a formal process without also examining the underlying informal processes already in existence, the organization could put a formal process (structure) on top of usual patterns of behavior that run counter to what is written. When the formal and informal processes challenge one another, the informal is likely to win—because it is the one the members of the organization understand, are familiar with, and intuitively know how to work.

To give an example of warring informal and formal processes, some churches attempt to set goals once a year at a church board retreat without looking at what is already being done. The members of the board ask the question "What else should we be doing?" They set a number of new goals, write them in the minutes, and forget them until next year. The informal goals were entrenched in what the church is currently doing. These are not easily changed. The formal goals will not be actualized until the informal practices have been carefully and consciously amended to provide space for something new to fit in.

Many lay leaders and pastors do not think about the process until something goes wrong. In the constant interaction between social context, congregational identity, and particular programs, process is a key to maintain the health as well as discern the ills of a local church.

## 4.2 When to Address Process Concerns

Each of the cases in the initial chapter can be viewed as a breakdown in process, the kinds of experiences which pastors and church leaders know all too well. Sometimes the problems are obvious to everyone and are easily confronted. There are times, however, when symptoms of difficulty will not be apparent and when an audit of the congregation's process functioning would be appropriate. Consultants to local churches recommend an annual audit, committee by committee, group by group, to assess whether the informal parts of the system are healthy and sharing in the life of the whole. Usually this can be done by the groups or committees themselves in their regular, program-year-end evaluation.

Sometimes it is appropriate to do a process study in the congregation as a whole, especially when:

—There is an increase in hostile or unfavorable gossip.
—The number of committees in the church is decreasing.
—The number of programs in the church is decreasing.
—Participation at church social functions is decreasing.
—Members seem sour, withdrawn, or simply exhausted.
—There is frequent conflict, the cause of which is difficult to determine or understand.

A similar process audit might be appropriate for committees or groups, especially when particular symptoms persist:

—It is very difficult to find a chairperson.
—Attendance at meetings is spotty.
—When assigned tasks, members forget to do them.
—Meetings are boring, or definitely unpleasant.
—The committee doesn't meet.
—The work of the committee doesn't get done.
—Members complain about many issues not related to the work of the group.

This chapter, and indeed the whole handbook, has been written to address questions such as these. However, we must recognize that some members will not wish to spend time in reviewing process issues. They may believe that process concerns get in the way of the church's real work. Or they may believe that process deals too much with what some call "touchy-feely" activities. These critics must be appreciated, since they often have called attention to some of the pitfalls of inappropriate or self-indulgent concentration on process.

This chapter, and the study of process generally, must be kept in perspective. We need to study process not as an end in itself but as one way to facilitate the mission of the church. The issues of process are not primary, but without addressing process issues from time to time, a congregation's life together may be substantially hindered by the ways it approaches its tasks. Understanding process is appropriate and essential in the interaction of Christian identity and social context, of dynamic process and specific program.

One final introductory note: the elements of process that we consider exist in all parts of every congregation. All committees and groups have informal goals, just as the whole church has informal goals. Subcommittees engage in problem solving just as official boards do. The reader should imagine the application of each dimension in every activity. For example, when discussing planning, we may consider the annual activity of the whole church through its official board. We may fail to note that planning and evaluation are equally important in the choir, for the pastor, and in the nursery school—although each may go about it very differently. Therefore, while we will address ourselves at times to the total organization, at other times to the relation of a particular organizational component or process to a part rather than the whole, the reader should imagine that each of the elements discussed here are relevant *both* to the parts and to the whole.

Before beginning the discussion of specific congregational processes, we will first examine several ways of gathering the kind of information that is especially helpful in understanding process.

## 4.3 Gathering Information

Numerous ways of gathering information on congregational functions have been discussed in a later chapter on methodology. Here we are concerned with the application of those methods that grant unique insight into church process. In particular we will consider observation, document study, questionnaire, interview, and group discussion. Each of these methods has strengths and weaknesses, and none is "the right way" at all times. Each method must be chosen carefully and applied in a way which is sensitive to the area under study.

The act of collecting data is itself an intervention, which may attract interest, heighten concern, and may even arouse suspicion and distrust. Insofar as possible, the members of the congregation should be apprised of the planning and share in the data collection and interpretation. Especially in the analysis of unexamined and assumed process, the study committee may embarrass and alienate the very persons whose support is essential for the possibilities of change. Congregational study that is open and inclusive builds support for a new vision even in the way it approaches and honors the present "reality."

Let us look briefly at the implications of several methods of gathering information in the study of congregational process.

### *4.3.1 Direct Observation*

By far the most frequently used method of gathering information about organization process is the direct observation and personal experience of participation. Sometimes it is called "sensing," since all of the senses are significant elements of participation: watching, listening, touching, tasting, smelling, feeling. As one participates in the life of a congregation certain effects are noticed that give clues to the functioning of the formal and informal processes in that system.

In particular the thoughtful observer will be aware of:

Flow

What is the pattern of movement in the organization? Through whom do decisions have to pass before they are accepted? How careful are the members about sticking to formal agreed upon means of deciding? Are the patterns stiff and formal, easy and quick?

Incidents

What stimuli create which results? What is the "weight" of the stimuli? For example, in some churches little incidents seem to create excessive response on the part of the leadership; in other churches momentous occurrences generate little or no response.

Success and Failure

Members' perceptions of their church as succeeding or failing will give clues that the process may be working or not. "The meeting was a great success!" may be the only language that a participant has immediately available to describe an effective meeting. Or "It was a waste of time" may be an invitation to review process in the work of that group.

Surprises

Whenever expectations are not fulfilled, there is a disjuncture between prior experience and a particular event. The study committee may explore who is surprised (leaders? members? outsiders?) and why.

Hunches

Hunches are intuitions based on experience. They are similar to hypotheses discussed in the chapter on methodology, except that hunches remain as informal notations. Hunches are only useful when they stimulate and focus further study—and they are most unhelpful when they stand as data in a progress report.

Direct observation in the congregation has the unparalleled advantage of "feeling" for the congregation and contributions of particular members. Because by definition it rests on the feelings of the observers, it has the distinct disadvantage of inviting the imposition of categories and conclusions that are alien to the participants of an activity being "observed." Therefore, while it can provide the most sensitive data, the information can be irrelevant or oppressive. There is no substitute for observing as a participant, but taken alone it is an exceedingly subjective source of information. The disciplines of observation are noted in the chapter on methodology.

### *4.3.2 Documents*

Although more frequently used in the study of congregational identity and program, the documents of the local church can provide valuable insight into the processes of the local church. Creeds exhibit the values that seemed of primary importance at the time of their adoption. Constitutions and bylaws of the congregation provide the clearest expression of formal process, the most official version of the way things are supposed to happen. Newsletters offer insight into the procedures that support the program life of the congregation. Announcements printed in the Sunday bulletin (and spoken in worship) reflect styles of leadership, patterns of communication, and conscious efforts to expand participation.

Annual reports announce the way the congregation sees itself through the eyes of the leadership in the reporting groups and say as much about how things happen as the specifics of events. The budget with its income and expenses, annual expectations, and year-to-date reports is a veritable showcase of decisions, crises, and affirmations. Attendance reports reflect commitments to the church as a whole, and constituent parts. Printed sermons, lenten booklets, and even the mailings for stewardship campaigns reflect the dynamic of process, which holds the church together.

Church documents are the mundane tools of analysis constantly produced to keep the leaders and members in touch with the life of the congregation. They provide a rich resource for those who have "ears to hear and eyes to see." However, like observation, documents are best understood when seen through the eyes of those who have created them.

### *4.3.3 Questionnaires*

Questionnaires are the most popular way to gather information from the participants' point of view. There are many kinds of questionnaires, some homemade for the occasion. Commercial "instruments" or "inventories" are available from denominational offices and numerous consultants. These may be administered and interpreted by a study group in the congregation or by an outside resource person who will work with the study team in interpreting the results.

There are many advantages to using questionnaires. They make it relatively easy to hear from many people. They are much more objective than observation and less time-consuming than interviews. Questionnaires also provide information that is comparable, quantifiable, and anonymous. Some responses come from people who may not be active or who may be reluctant to talk with anyone face-to-face about the issues or problems under consideration. Such anonymity may create problems for interpretation of the data, but it provides important access in process issues that deal with sensitive attitudes and feelings.

But questionnaires also have problems. The information returned can be vague and confusing. For example, in response to the question, "What are the weaknesses of this church?" someone wrote "Fair clergy." Does that refer to one or all of the pastors? To a current or former pastor? Does it mean one or all was mediocre? Does it refer to their complexion or their sense of justice?

In an effort to define the responses, some questionnaires offer more specific alternatives. Even then the information can seem to be precise when, in fact, it is quite vague. One might ask people to respond on a scale:

Rate your enthusiasm for this group:

| Low | | Medium | | High |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |

The average response might be 3.2. It looks like hard data, but its meaning is not clear. Is enthusiasm important to the work of the group? Does everyone rate "3" on an enthusiasm scale by the same criteria? Does the scale compare to previous enthusiasm in this group, or is it a comparison to other groups? What does it mean to average the responses of individual group members? Without much more information, *including an opportunity to explore its meaning with respondents*, such data provides only one piece of the puzzle.

Further, questionnaires do not reveal much reliable information about what people, in fact, do. They will tell you something about their attitudes, something about what they would like to do perhaps, or the way they think they behave. But their responses may differ radically from their actual behavior.

Some people simply do not respond to questionnaires. The congregation may have been "surveyed to death"; or the results of former questionnaires may have been mismanaged by sins of omission, commission, or both. Responding to questions implies a trust that the information will be handled discreetly and used effectively.

Finally, the questions themselves are inevitably biased. Questionnaires begin by making assumptions about what problem areas might need to be addressed. Whether the instrument is made by a consulting firm, an organization interested in research, or a committee of the congregation, those developing it begin by making some guesses about what the problem areas might be. Frequently this is very helpful, because it gives you ideas about "places" to look. On the other hand, it can introduce a bias by ignoring important areas and highlighting other areas of concern—especially important in sensitive process issues. In the questionnaire there is very little opportunity for the questioner to follow up or the respondent to explain beyond the initial concepts that are built into the instrument.

Despite their limitations, questionnaires can be very useful in unpacking the overt and hidden process in the church. Especially when they are immediately and directly coupled with an opportunity to discuss the results with those who filled them out, they can be provocative and useful foundations for understanding and change within the congregation.

### *4.3.4 Interviews*

Interviews provide the kind of information that is inaccessible from observation, documentation, or questionnaires. The most important advantage of interviews is the opportunity for the interviewer to work with the person giving the information to explore an area of common concern. If the person finds it difficult to express opinions, he or she can be supported and encouraged to do so. If the person has an idea that is not yet fully shaped or finds the discussion of a particular topic new and awkward, the interviewer can help the speaker clarify and amplify her or his thoughts. Interviews provide an opportunity for clarity of expression and an exploration of relationships and complexity of ideas. Once rapport is established with the respondent, she or he is likely to say more and explore more in the safety of a trusting relationship. In process issues, the confidential conversation may provide the basic insight to interpret the relationship between observed behavior and responses to a questionnaire.

Two kinds of interviews are frequently used for process research: unstructured and schedule-structured. An unstructured interview starts with a broad statement of task or common concern and lets the respondent take the discussion wherever seems appropriate. A typical question might be: "We're here to talk about your perceptions of the church; tell me what you see are its strengths and weaknesses." The schedule-structured interview employs a more formal approach, such as:

> Are the goals of the church clear to you?
> What do you think they are?
> How do you make decisions in this group?
> Do you have enough information to do your work?

The privacy of the personal interview can provide information that helps the interviewer to understand how the member believes the congregation "really functions." However the very intimacy of such sources sometimes makes the material awkward or unusable in more inclusive social settings. Information from interviews often needs to be verified through other sources before it is useful in the interpretation of congregation processes.

### *4.3.5 Group Discussion*

A combination of several data gathering methods may be employed in group discussion or collective interviews. Although others may find the group interview too "messy" in its combination of disciplines, it seems well-suited for understanding the dynamics of process. The interviewer must be alert and "reading the situation" on several levels at once.

These discussions can be open-ended: "Let's talk about how we get work done around here." They can also be focused around a schedule of questions such as those listed above. Sometimes a group discussion will come directly out of the experience of asking all group members to fill out a brief scaled questionnaire, the answers from which are immediately shared with everyone present. Opportunity is thereby given to amplify and explore what is meant by the numeric responses. A third way to explore group processes is to ask the group to simulate an activity similar to those in which they usually engage. This simulation sometimes makes it possible for the group to be slightly more objective about its experience, by analyzing something less threatening than their regular (or real) task, structure, and process. Typically, simulations are role plays of genuine problems, but not with the specific details of issues currently facing the group. A fourth group discussion method is through the use of a case study. In this method the group lifts up an incident from the life of this church or a similar congregation. Based on their experience but without the passion of urgency, the members explore: What happened, what made it worse, what made it better, and what can we learn from this experience?

In group discussion, the study team can observe the dynamics of congregational life at work, including the leadership styles, communication patterns, norms of behavior and belief, decision-making process, and conflict resolution. Thus the members of the church may both act out and explain the formal processes and the informal processes that are natural to the congregation. With some guidance they may see the distinctions within their own behavior and beliefs, and they may model strategies that could help the congregation move in the desired direction.

Not all issues can be examined in the group context, and some individuals are uncomfortable in such settings. Some group settings exaggerate the issues, and all such procedures are slow and uncertain.

No single method of data gathering is sufficient. Ultimately the congregation is more than can be measured. But taken together, observation, questionnaires, documents, interviews, and group discussion can provide functional insights into the "way we do it around here."

## 4.4 Organizational Processes

Any list of organizational processes would be inadequate since there are a wide variety of analytical tools that have been used to describe the dynamics that knit the common life together. In this chapter we have gathered a few examples around several basic themes:

1. Planning: approved procedure and hidden process
   1.1 Agreement on task
   1.2 Agreement on role
2. Training and nurture of leadership
3. Support, feedback, and process review
4. Needs, norms, and sanctions
5. Diversity and conflict
6. Problem solving

### *4.4.1 Planning: Approved Procedure and Hidden Process*

"Planning refers to any method of thinking out acts and purposes before hand," says one dictionary. This is a helpful definition for the purposes of this chapter. Congregations, committees, leaders, program groups, and teams all engage in some kind of planning. There is always some kind of informal planning, figuring out what they are going to do. Sometimes there is formal planning, that is, a routinized, agreed on process for determining their needs, adapting to their social context, and affirming their identity in the goals they choose, the programs they support, and the way they go about their common life.

Planning is one arena where task, structure, and informal process all come clearly into focus. Certain questions are basic for our discussion and can be used in the local church as a basis for analysis through observation, reading, documents, interviewing, and questionnaires:

—Does the group have a formal planning procedure?
—What is the informal planning process, and how well does it serve the needs of the group?
—If there is a formal procedure for planning, does it work with or against the informal process?

*Is there a formal planning procedure?* This can be determined by observation, interviews, and review of the documents. This information is available from leaders, minutes, and other documents. Recent church leaders may be able to describe what steps were taken to carry out the planning procedure and what the results of that process have been. The team can examine the minutes of the official board for the last several years to look for descriptions and results of various planning procedures. Further, the team should ask if the congregation has developed a standard operating procedures manual that describes how planning is supposed to be done in the congregation, including who is to do what by when. In many cases the congregation will invoke procedures developed by a denomination or church-related agency.

If, indeed, there is a formal planning process in place, the team should talk with the clergy, board members, and members of the planning committee, if there is one, to determine:

Whether the planning procedure is fully or partially utilized;

Where people are having troubles with it;
Where it is helpful in clarifying tasks and roles.

A helpful formal procedure is described in the program chapter, which can be a resource for congregational planning.

*What is the informal process for planning, and how well does it serve the needs of the group?* It is assumed that all congregations have developed a way for agreeing on what they are going to do and who will do what, for defining task and role. However, it is not always easy to see and understand how it works. Planning may not be consciously undertaken. Many congregations plan by an informal process that seems appropriate to them in their situation, as illustrated in the following statements:

"The pastor tells us what to do."
"Only those who have been here many years (or who contribute substantially) can influence what will be done around here."
"We wait until there is no disagreement about our ideas before they are implemented."

This is only a partial list to suggest that informal planning processes have to do with the way people approach the task, who is involved, who is not involved, how decisions are made, and who is informed about those decisions.

The study group must develop appropriate criteria for effectiveness, for example: Are the members satisfied with it? Are the leaders satisfied with it? Is it responsive to the demands of the gospel and to the needs of people in and out of the church? Does it help many participate in leadership, or only a few? Is decision making appropriately and fairly distributed among those who participate in the congregation?

*If there is a formal procedure for planning, does it work with or against the informal process?* Here the question has to do with what parts of the system are most significant in shaping what the organization actually does. When the formal and informal are "out of sync," people are likely to experience considerable frustration, sometimes for opposite reasons. Some had expected the formal procedure to work, and others had assumed that the informal would prevail naturally. Each can war against the other and interfere with its smooth operation. This kind of tension is seen when an elected board in a church decides to use democratic, open planning procedures, involving the participation of many members in rational planning and task agreements, only to have this agreement sabotaged by certain powerful individuals or groups who have always been influential in the congregation and now disagree with the directions in which the church is moving. Pastors can be such powerful individuals, as can be choir members, trustees, large donors, or volunteers who have given generously for many years of their time and leadership to the congregation.

But the struggle between formal and informal does not have to be around "power;" it can also be within the processes themselves. The formal procedure may rely heavily on rational, planned change models for shaping congregational directions. When tested, the members may find that they are accustomed to, and prefer, more intuitive, "Let change come in God's good time" models.

What is going to be helpful to the pastor and other leaders studying the congregation at this point is the use of investigatory disciplines that will help to describe what is happening formally and informally within the congregation. When the descriptions of what is actually happening and the available alternatives are outlined side-by-side, then the study team or leader will be best able to modify the formal and informal systems to increase compatibility between them.

Two dimensions of planning are frequently process issues in local congregations: agreement on task and agreement on role. We will examine task in this section and role in the next.

*4.4.1.1 Agreement on Task*

In chapter 1 the case of Heritage United Methodist Church was introduced. It is an illustration of the problems generated and discovered by the clash between formal and informal planning processes. The bishop and the pastor made informal plans, which were translated into extraordinary procedure of a new committee. The bishop wants "both mission and ministry," by which phrase he may mean that the church ought to involve itself in activities that would serve the needs of persons who are not members of the congregation. The Rev. Ms. Jones's goals seem to be compatible with the bishop's goals in that the redevelopment of a building into studio apartments for the elderly would seem to meet his desires for more mission to the community. We are also told that the bishop has hopes that Ms. Jones will "bring life into the congregation"; however, this priority may hinder if not be contradictory to the goal of mission in the community. But the bishop and the pastor have goals that are apparently incompatible with those of some of the leadership in the congregation who want "evangelism of adults for the church and children for our church school." Thus, in this case, the process issue is one of a conflict of goals.

In a typical congregation that has disagreement on task, the process often looks like this: members discuss with each other privately (for example, when they gather at Bob's Big Boy Restaurant) their troubled feelings about the tension they are experiencing. The focus of the conversation is on complaint and on bad feelings. Many may try to influence others to join their side, though there is probably little action being taken to actually call the church or its leadership into a clear decision. The pastor acts much the same as the parishioners—not really knowing "what to do" she will talk with individual members privately, to some people at the denominational headquarters and others, perhaps, at a continuing education conference.

At some church meetings there will be what seems to be progress, but no one is exactly sure what progress means—unless it is the absence of acrimony.

When these symptoms appear, how can the pastor and church leaders get the information they need to move into and through this frustration? How can they make it a learning experience, an opportunity for insight into themselves and the development of skills and resources for facing similar situations when they occur in the future? In a comprehensive way, this handbook is a response to such questions: the congregation can claim its identity and study its context (as suggested in previous chapters) and the congregation can engage in an inclusive and open-planning procedure (as suggested in the chapter on program). Often when the church leadership is involved in direct study and dialogue with the community, the impact of that experience raises consciousness and has a profound, positive effect on the clarity of goals within the congregation.

In this chapter we are primarily concerned with the impact of process on the planning procedures. Several helpful instruments for setting priorities and determining membership commitments are available in bookstores and through denominational offices. For example, Grayson Tucker has developed and documented an instrument called *A Church Planning Questionnaire*[3] (see Appendix 4–1). This questionnaire has several useful features. First, a list of sixteen proposed goals provide the respondents an opportunity to determine the popular program priorities for the congregation. Second, the questionnaire explores how process issues affect program priorities. There are a number of specific questions about the congregational climate that give the leadership quick and direct feedback from parishioners about how they feel about themselves at this point and the level of tension that they are now experiencing. There are questions that measure the following climate categories:

—warmth and support
—morale
—openness to change
—the amount of conflict
—decision participation

These responses, coupled with the data about program goals and social context, can profoundly help the leadership assess *how* people are handling their differences as well as what it is about which they disagree.

Third, this instrument provides data about other congregations and allows the members to compare their levels of warmth and support, their morale, their openness to change, and so on with other congregations. This can be useful to a vestry, council, or session. Usually that board has only itself and no one else with whom to compare. With the comparative scores, board members can see that certain responses in churches tend to get higher scores and other responses lower scores. Thus the leadership has a way to measure climate that is better than an assessment based on the responses of this congregation alone, which leads to statements like "a slightly positive score is as good as one can expect." Perhaps a "slightly positive score" tends to be higher than that of many or most other churches. This would give the study team a different perspective when it discovers "slightly positive" is more positive than anyone else. On another question, what seemed to be a low response, compared to others, may be quite respectable. Of course, it is not possible from Tucker's relatively small sample to draw conclusions, but it helps those in the congregation have something with which to compare their experience.

One church that used the instrument discovered that while there was substantial agreement about goals (what the people wanted to do in the church), and while there was a good deal of warmth and support for one another, morale was low and people felt they were not substantially involved in the congregational decision making. The investigation, then, made it possible for them to see those process areas in which work was needed.

The comparison between planning procedures and process issues cannot be conducted by an elite group or pushed through the congregation. Such sensitive materials take time to explore and digest, and they need to be shared in a way that gives church members an opportunity to respond. Retreat settings are often appropriate arenas for such discussion since these provide the intensity of presentation, the time for reflection and informal discussion, and a continuity of participation. Consultants, even neighboring pastors and trained laity, may help the congregation achieve the combination of objectivity and intimacy essential in these discussions.

The method for using this questionnaire is substantially outlined in Tucker's book. The study team may make its own tabulation of the responses or use the resources provided by Tucker. A similar service is provided when using the Parish Profile Inventory of Hartford Seminary, which contains a section on various organizational processes. (See General Appendix.) Some denominational offices provide similar resources, and denominational officials are often willing to work on an ecumenical or interdenominational basis. A wide variety of these tools is also available through the *Whole Church Catalog*.[4]

*4.4.1.2 Agreement on Roles*

"A *role* consists of one or more recurrent or patterned activities of the *player*, activities that involve corresponding expectations on the part of others who are related to the player. The term is borrowed from the theater and is used to make clear that the expected behavior relates to the *position* of the focal person and not the *person* who occupies the position," says Donald Smith in *Clergy in the Crossfire*.[5] This is a distinction easier to make with formal role definitions than with those that are informal.

Most recent literature about roles in the church has focused on role conflict with reference to the pastor. It highlights the importance of clarifying the expectations of the pastor by the congregation's leadership, as well as the pastor's expectations (which might be quite different) of what his or her appropriate tasks are, their relative priorities, and the style with which they are carried out. Typical problems of role conflict concerning the pastor are:

Formal

whether the pastor should attend Christian education meetings.

whether the pastor should be the person to call on shut-ins.

Informal

whether the pastor's spouse should work outside the home.

whether the pastor may be an elected official on the school board.

These are not the only role conflicts, however, that congregations experience. Frequently there is confusion and disagreement about tasks, priorities, and styles related to lay leadership and lay committees. Examples of role conflicts that occur in relation to committees are:

—The church board asks the evangelism committee to find ways for members personally to invite newcomers into the church, and the committee develops a plan to mail three letters to new people who worship there on Sunday morning. The board believes mailing letters is the task of the church secretary, and the committee should find a more personal approach.

—The Christian education committee orders a complete new curriculum for the church school, far exceeding its budget for the year.

—The women's group raises money from church members at a bazaar and doesn't report what it has earned or how it is using the money.

Examples of role conflicts that occur in relation to lay leadership include:

—The head of the building and grounds committee never calls a meeting; however, when he or she notices tasks that need to be done around the church he or she either does them alone or asks someone else to do them.

—The elected lay leader of the church is very bossy in meetings, not allowing others to express their opinions if they differ with his or hers.

—When a person is in the hospital, members of the family don't share that information with the pastor.

These examples relate to two kinds of role conflict, *task* and *authority*. The case of Hope Church in chapter 1 suggests a congregation with much role confusion. The congregation assigned certain program tasks to each pastor, but it is not clear if it granted the authority necessary to achieve those tasks. The congregation retained certain responsibilities in its dialogue with the conference minister, and the issue of authority (the right to ask and the willingness to respond) is being carefully negotiated.

All organizations, including churches, divide *tasks* among roles, giving some responsibilities to this person or group and others to that person or group. Problems arise when there is disagreement or misunderstanding about what those tasks are or should be. When the "evangelism" committee becomes the greeting committee, some of the members of the congregation may be frustrated and disappointed in its behavior. Others may be disappointed by the building and grounds chairperson who they hoped would function as a convener of people to reflect on the property needs of the church, but who actually functions as a dispatcher of maintenance tasks in the congregation.

Disagreements about *authority* have to do with who has the legal or traditional right to make particular decisions within the organization. Many times the legal right to make these decisions is given to a person holding an office or to a committee. For example, in some denominations church membership is authorized by the pastor, in others it is authorized by the church board, and in others by the congregation.

Where authority issues become problematic, the situations are usually not related to authority that is legally established by the denomination, but relate to that which people thought was "understood" but has not been formalized or publically agreed upon. For example, a role problem related to authority has to do with whether the church board has the right to meet without the pastor being present. In some congregations the authority to meet without the pastor is granted under certain conditions and clearly spelled out. Meeting without the pastor becomes an issue when it was assumed that the pastor would be there—but some on the board want to meet without him.

In the life of the congregation, role difficulties concerning task and authority are often related to differences in the levels of "contracts" among individuals and within the group. Bradley, Harper, and Mitchell have distinguished between three levels of contract (that is, promises people make to each other about how they will behave): formal, informal, and tacit contracts.[6]

> *Formal contracts* are public, articulated, often officially witnessed. They can be changed only with effort and a process as public as that in which they were established.
>
> *Informal contracts* are private, articulated in conversation, easily changed but, until changed, create a sense of obligation.
>
> *Tacit contracts* are private, unspoken, and sometimes unconscious, revealed through behavior patterns. People behave as *though* they have made certain promises to each other.

An example of a formal contract is a job description, a wedding vow, or a motion made at a meeting. An example of an informal contract is a statement agreed to, such as "Would you mind picking up the kids after school?" or "We usually open our meetings with prayer," or "Let's go to the ice cream shop after the meeting." Tacit contracts are profoundly more subtle, but every bit as powerful as formal and informal contracts. Though they may not talk about it directly, an unspoken agreement between two young persons falling in love with each other is that they will not "see" anyone else. In a church, tacit contracts often center around such things as frequency of church attendance, deference to the pastor or certain older (or wealthier) members of the church, or whether it is alright to challenge another's theology.

Illustrations of formal contracts that have to do with authority are budget statements stating that this committee is authorized to spend this much money, constitutional provisions stating that the president may name the nominating committee, and so on. Informal contracts regarding authority are verbalized agreements between individuals such as the understanding that "none of us likes to be told what to do," or "Why don't you go ahead and make those decisions for us, Jack, since none of us will have the time to go to the store with you." Tacit authority contracts are illustrated by assumptions that some make about the kind and amount of initiative men may take toward leadership as opposed to the amount and kind of initiative women may take; or they are reflected in the rights that some seem to have that allow them more influence in decisions than others because they are more active, more pious, or larger contributors.

A local church has trouble when members have different understandings of their role contracts with one another—especially when some of the role contracts are tacit, not expressed or openly agreed upon. The tensions in High Ridge Presbyterian Church in chapter 1 are rooted in a conflict of tacit contracts of appropriate behavior for members. Each side apparently believed in the Bible and quoted scripture to the others, but the particular issue of wine at the wedding had never been tested. No formal or informal roles had been established, but the informal authority of the bride's father is clearly at odds with the formal authority of the session to set policy.

To gather information on role, task, and authority, a comparison of formal documents, observation, interview, and questionnaire is useful. For illustration we offer three typical role clarification situations: overall task clarity for clergy, task clarity in a multiple staff, and authority patterns in a group or committee.

#### *4.4.1.3 Overall Task Clarity*

When looking at tasks that need to get done within a local church, often the congregation decides that it will examine the committees and what they do, the staff and what they do, *or* individual laity and what they do. Thus, the church loses the big picture of how the parts interact and their total ministry. Rusbuldt, Gladden, and Green[7] have included in their manual on local church planning an instrument for assessing mutual understanding of the roles that a minister takes and those taken by the church members (see Appendix 4–3). This instrument consists of fifty statements describing activities that might be appropriately undertaken by either clergy or laity. The pastor (or pastors) and laity are asked to rate on a scale from 1 to 10 how high a priority each activity has for clergy and how high a priority each has for laity. Once each statement has been rated by all who are participating in this research, they are summarized into ten categories and comparisons can be made between the variety of lay responses and their differences with the clergy responses.

A design for carrying out this research could include sending the questionnaire to all the members of the parish. Unless the congregation is quite small, however, the amount of information might be overwhelming. Usually, this data gathering is best done with the official board or the official board plus ten to fifteen other key church leaders. To maximize the use of church time, it is recommended that those who fill out the questionnaire do so at home and send it to the person who will be collating the information before the meeting, so that summaries can be prepared before those who will be examining the data arrive.

The study committee would want to note the pastor's ratings separately, the degree of agreement among the laity, and the comparison between pastor and membership. Generally the degree of disagreement among the laity is greater than the comparison between pastor and members, thus helping the board and the pastor to appreciate and interpret the pressures that each are feeling.

### *4.4.1.4 Task Clarity in the Multiple Staff Team*

Churches with more than one professional person sometimes experience conflict and confusion about who is supposed to do what—or who is in charge of what. Sometimes work falls through the cracks, sometimes staff members believe their prerogatives have been usurped, sometimes members of the team feel there is much wasted motion because of disagreement, duplication, and inefficiency. Even job descriptions and other official documents may not untangle the tensions that conflict can generate.

One way to investigate these concerns is to look into team task agreement through the use of a structured group interview in a staff team setting. This design for data gathering works best in a one- or two-day retreat setting.[8] First, ask the members of the team who will be at the retreat to answer these questions in writing, before they arrive:

What do you feel the church expects you to do in your job?

What do you actually do in your job?

Identify specific difficulties or concerns you have in working with other persons on this committee, or in this relationship.

What do you need to know about other people's jobs that would help you in your work?

What do you feel others should know about your job that would help them (and you)?

What do you need from others in order to do your job the way you would like?

This list amounts to an interview schedule when every member of the team is asked to share his or her answers with the rest. It puts the data out in front of all, making it possible for all to join in correcting, amplifying, and analyzing those pieces of the whole of which each has given a part. Careful study of all of the information can help the staff team identify what is missing, where help is needed (perhaps more paid or volunteer participation), where some may be duplicating work, or where some may be working in areas that are not appropriate to their job description.

### *4.4.1.5 Authority Patterns in a Group or Committee*

Authority issues continue to be an area of discomfort and, sometimes, conflict in certain congregations. Some older members' groups and committees have been schooled in (and been successful in) more hierarchical structures and ways of relating, whereas some younger members do not believe "hierarchy" and "democracy" are compatible terms. In other cases the congregation has established multiple paths of accountability, which may be confusing to the staff and members of the congregation. These situations and many others have to do with agreement on authority, including who exercises it, to what extent, and how.

A useful instrument for analyzing the authority patterns of church leadership groups and committees has been devised by a Lutheran staff team including Gary Anderson, William Berge, William Behrens, George Keck, and Joseph Wagner, and published in a book entitled, *Strengthening the Multiple Staff.*[9] This instrument (see Appendix 4–2) explores four kinds of structure. The following is a summary from the book:

### *4.4.1.6 Four Types of Authority Relationships*

*Type 1: Dependent.* Dependent groups have clearly identified decision-makers. Members share in decision making as advisory participants, but often decisions that are made at one level are subject to the authority of yet higher level decision-makers.

The major goals of dependent groups are not usually established by group action. Group members may contribute to the discussion of such goals, but they are finally fixed by higher authority. The expected behavior of members is to conform.

Dependent groups have some positive features. Often they are efficient. They have the ability to get things done. If the leader is capable and respected, there can be a great sense of purpose and accomplishment. Decisions can be made and carried out quickly.

The major disadvantages for a dependent group are a possible lack of unity and low commitment to goals. Creativity may be stifled, and members, apart from the leader, may have little program ownership or zeal.

*Type 2: Independent*. In the independent style, the pastor and all group members function quite separately. Each has his or her own sphere of ministry and the interaction between them is minimal. Areas of work are generally clearly defined and significant group meetings are few and far between.

At its best, this style allows for much creativity and freedom. Group members do not work under the sense of constantly being watched or told what to do. If goals coincide and the work of various members meshes well, much good can be accomplished.

On the other hand, this style has potential for trouble. There is the probability of competitive conflict. There is little opportunity for exercising concern among group members. Goals are generally not commonly arrived at. The potential for each group member to build a competitive following in the congregation is greater than in other styles.

*Type 3: Interdependent*. Interdependent groups are characterized by frequent and intensive interaction between members. Such interaction is prized, not only as a vehicle for conducting business but also as a means for developing a supportive system among group members. Members practice confrontive communication with minimal risk. Differences are viewed as assets for improving the quality of problem solving and decision making. Feelings are considered a natural and legitimate element in human interaction.

Goals in interdependent groups are established by all and cared about by all. Meshing individual and team goals is prized.

Decisions in these teams are typically made by consensus. Participation by all members in this process is encouraged. Leadership rotates among members according to the contribution they make. Members practice mutual accountability. Commitment to the group is high and significant personal investment from members is required.

A possible negative effect is that not all persons are suited for this working style. Some people are more independent, and others are more dependent. Also, some situations call for a different working style. The best working style is the one that works best for the people involved as well as the situations in which they work. A group is working at its best when it gets the job done while caring for the needs of the persons in the group.

*Type 4: Collaborative*. This is the least common group style of the four. In this kind of team, there are no independent decisions. Every decision is referred to the team. Team goals are established by the team and shared fully by the whole team. There can be no individual failure or success. There is only team failure or success.

Harmony and fully shared responsibilities are highly prized by collaborative teams. The style minimizes differences. The collaborative style shares many characteristics of the independent style. But the independent style fosters interdependence between the members, the collaborative style fosters dependence on the team.

The collaborative style can work well if the balance between meeting personal needs and doing the task is kept. However, this style has the potential for inhibiting individual creativity and initiative as well as taking too much time in decision making.

The Lutheran instrument is specifically designed for analysis of authority styles among multiple staff teams of clergy, but it can be useful for interpreting styles among members of boards and committees throughout the congregation. It does not assume that any group falls completely into one category, but that there is a mixture of structures functioning at once, perhaps changing with different combinations of issues and individuals. It is not assumed that each member will have the same perception of experience. Therefore, each member's perceptions are scored separately so that one can be compared with another.

Use of the instrument should be combined with group discussion of results. Often there is a striking similarity between the pattern of group discussion and the results of the data from the instrument, for which observation and further inquiry seem appropriate. Even if the instrument is not used, the four types of group authority provide a framework for observation in a group, and a basis for interview and discussion with the group concerning their perceptions and practice of group participation.

#### 4.4.1.7 Tacit Authority

By far the most difficult processes to analyze are the tacit contracts that members and staff persons have with one another. These are difficult because they are hidden and often personally threatening. Formal and informal contracts have been expressed and discussed by the people in the relationship. Often tacit contracts have not been discussed and may even be below the conscious awareness even of persons who participate in the tacit contract.

To examine these organizational dynamics, the study team may want to begin by identifying what they already know to be formal and informal contracts in the organization's life. As they begin to understand what formal and informal contracts are operating, they should try to assess which of these contracts are functional, and which are not helpful to the relationship or the group. There may be tacit contracts working in opposition to the formal or informal contracts.

For example, in the case of Hope United Church of Christ described in chapter 1, the search committee clearly has a formal contract with the congregation to find a new minister, and, likely, an informal contract with the conference minister to do what he requests so that he will give them names of potential candidates for the job. Something is not working, however, with the contract with the conference minister. An analysis of the formal and informal contracts with the conference minister could be done by the search committee. They could ask:

What are the terms of our understandings?

What is expected of us by the conference minister?

What has, in fact, happened in relation to those contracts? Have we fulfilled our part of the bargain?

Has the conference minister fulfilled his part?

What do we gain by resisting following through on our agreement?

Is there anything the conference minister gains when we resist our part of the bargain?

These questions are difficult to "get a hold on" and to keep in focus by the group. Sometimes they generate a good deal of discomfort—especially if members begin to realize that, perhaps unintentionally, they have joined in a process to punish the conference minister for past difficulties they have had with their clergy. When groups decide to work at this level without skilled and dispassionate facilitation, they may find the task quite threatening. In these situations they might benefit by including someone who is not on the committee, who could help them sustain their analytical task in ways that can produce learning.

### 4.4.2 Training and Nurture of Leadership

The word "training" comes from the Latin *trahere*, which means "to draw or to drag along"; in English we find other words that retain the same root meanings: railroad train (pulls railroad cars), mule trains, gear train, the train of a bridal gown, a train or course of thought. Churches have many ways they draw or drag newcomers and old-timers into their life and work. By *training* we mean bringing people into the organization's life and processes by various means so that they can function as leaders with confidence and competence.

There are various ways that training gets done in the church but the major ones are these:

Orientation

- Giving people material to read on a subject.
- Telling people about what's happening during the week.
- Giving newcomers a "walk-through" of the building.
- Giving someone new to the board instructions on how to read the budget.

On-the-job training

- Giving a person a job and hoping he or she figures out how to do it like everyone else has done.
- Standing with the person as he or she goes through the various steps, correcting and helping.

Continuing education

- Sending the person to a training session outside the church.
- Holding classes in the church.

Formal training can include:

- Classes (Bible study)
- Opportunity to practice skills (Choir practice)
- Films
- Discussion groups
- Feedback sessions
- Orientation
- On-the-job, supervised experience
- Preaching
- Reading a manual

Informal training can include:

On the job, unsupervised experience
Trial and error

One of the most regular and, in some churches, regularized patterns of training (both formal and informal) is done when a new family is drawn into the life of the congregation:

On first arriving Mr. and Mrs. Jones are shown where the toddlers' room is for the two-year-old.

As worshippers they are given a bulletin to guide them through the worship service.

After the service they are directed to the coffee hour.

After they have attended a few times the Jones's receive a letter from the pastor and a brochure describing the various activities in the church.

After participating for a couple of months and attending a social event, the pastor talks with them about how they might officially join the congregation. Part of the procedure would include attendance in a membership or confirmation class.

After joining the church Mrs. Jones is appointed to the missions committee and is given a course on the missions her church is supporting through the congregation and the denomination. Mr. Jones is asked to serve on the annual stewardship campaign. . . .

The point of this outline is to underscore the fact that formal and informal training is occurring throughout the life of the church. Some congregations do these tasks well, others do them poorly, but every church is engaged in the processes of training its members formally (that is in a class or coaching session) and informally (on-the-job experience or comments made by disgruntled parishioners who do not like what has been done).

The resistance to training is high in the church, and with good reason. Much that has passed for formal training has been shoddy, ill-prepared, and delivered poorly. Often volunteers who do not know what they are doing are asked to train other volunteers in the implementation of the tasks of the church. Their lack of experience and knowledge is picked up by the "trainees" who, next time, prefer to muddle through the task rather than "waste their time" on training.

Some of the resistance to certain training for church leadership comes from the fact that it may *seem* esoteric, arcane, and irrelevant. Here we are not talking about the holy mysteries, but relatively simple tasks including group process and community building. Some church members are not used to talking directly with others about their behavior and feelings in groups, and requesting them to do so may generate perplexity and resistance. Without clarity about the importance and practicality of the task in the church and for her or his everyday life, the parishioner will resist taking what will seem like extra time (add-ons) to an already overcrowded volunteer schedule.

How, then, does one discover whether the formal and informal training processes in the church are adequate? One begins by looking at the way the church is functioning and then builds on the experiences of leaders now in place. The most effective programs of leadership development build from the insights and feelings of those who are doing the job. Even people who are doing poorly can be helpful when they are included in a review of the formal and informal training processes in the congregation.

Formal documents (such as job descriptions and manuals of procedure) may be a place to begin and may be a resource that will eventually be upgraded as a result of the study. But interviews and especially group discussion can be most revealing of training needs done through formal procedure and informal processes. The interview might well include asking people in every part of the church's life what kind of training and guidance they have had to help them participate in the life of the church or carry out their work effectively. They should be encouraged to talk about what experiences they have had to help them "learn the ropes" and gain the skills they need to participate or to carry out their tasks. They can do this by sharing their reactions, new knowledge, skill development, and other results of the training experience. Here is an example of an assessment of the training received by official board members upon being elected to the board.

Each new board person is interviewed one year after taking the position. The interviewer requests one hour for the interview. After establishing the reason for the interview and discussing what will be done with what is learned, the interviewer follows a schedule of questions similar to these:

Tell me about your experiences before the first board meeting. Did anyone talk to you about what they did there, when they met, how they were structured, or what your responsibilities would be outside of the meetings?

Had you heard about what goes on at board meetings from any of your friends at church or had you had experience on other church boards?

Was there an orientation or training session for new board members?

How did you learn what the ground rules were for who could talk at meetings, how decisions were made, what the goals and purposes of the board are?

Had you been given material to read about this church board: the constitution, the book of order, past minutes, or budgets?

What is your reaction to the way you were helped into the board?

What knowledge do you think it would be important to share with others who will have an experience similar to yours?

What skills do you think it would be helpful to have to be an effective board member?

From the responses to these questions, a group discussion can be organized to help members of the board become more aware of their process of mutual training. Note that the adequacy of training and guidance is best learned not by asking people what they need before trying to do it but by talking to those who have been through the experience in order to understand what they are up against. "Experience is the best teacher"—especially if it is carefully reviewed and openly shared.

Any part of the life of the congregation has potential for improving the way people are helped to be involved and to participate well. Here is a partial list of roles, activities, and experiences that could be helped by competent training and guidance:

| | |
|---|---|
| Teaching a class | Singing |
| Becoming a member or adherent | Setting goals |
| Leading a study group | Preparing budgets |
| Leading a committee | Ushering |
| Calling on members | Preparing for communion |
| Worshipping | Preparing for marriage |
| Praying | Greeting newcomers |
| Cleaning the building | Pledging |
| Evaluating the pastor | Listening |
| Calling a new pastor | Interviewing job applicants |
| Planning church outings | |
| Being with a friend in grief | Preparing a meal at church |

### 4.4.3 *Support, Feedback, and Process Review*

In the chapter on program, assessment and evaluation are discussed as formal processes in the local congregation. The material provides a procedure for regular personnel and program evaluation. But formal evaluation is not the only way members and staff discover "how they are doing." Most of us want to know how we are perceived by others in all our relationships and have developed an informal means to check this out. We note the posture and attentiveness of the persons with whom we are dealing; we note whether most of their responses are negative or positive; we are attentive to what third parties say about how we were received by others not present in the discussion; some are even so bold as to ask others what they thought of their performance or the experience of which they were a part.

Churches and committees also have various ways by which they "check out" the responses of worshipers, committee personnel, volunteers, and participants in all sorts of church activities. Leaders are attentive to the numbers of participants, the frequency of attendance, the comments that are made after the meeting, the amount of enthusiasm expressed for what has happened.

Not always, however, are these informal means of regular assessment of life together accurate or complete indicators of individual or congregational satisfaction. A scowling face may be the result of poor process or an upset stomach. Decreasing attendance may have more to do with contextual factors than the substance of a program. Lack of enthusiasm may come more from poor process than from poor content. The person or group interested in analyzing those systems which help people accurately analyze "how they are doing" will want to explore several levels of process. The annual formal evaluation system is discussed in the next chapter. Here we are concerned with feedback, communication, and disciplined evaluation of process.

Areas to be considered in reviewing feedback and communication would include:

—How the board lets the staff know how they are doing on a regular basis

—How the board lets committees know how they are doing on a regular basis

—How the staff members let each other know how they are doing

—How lay leaders discover whether they are appreciated and are "on target" with their leadership

—How participants in worship and programs let the staff know how they are doing

Knowledge about this informal feedback and communication best comes from direct *observation* and *interviews*. Observers of group life often undertake this assessment of group life with a set of values or assumptions about appropriate informal communication and feedback. Through observations of behavior and questions of the various participants, the observer can assess the quality of the feedback processes. Here are a series of criteria for observation that can be used in staff, committee, or congregational settings:

—People tell one another what they have been doing.

—Information on results is collected and given to those who have carried out the task.

—There are preset and agreed upon goals or objectives concerning the tasks people carry out in the organization.

—Assessment of what people do is not based on their personality.

—Trust is high.

—Excuses, blaming, and low ownership are short-term and atypical.

For example, this evaluation can occur in the official board. The board may want to assess informal feedback to committees and program groups. One way this can be done is to ask one person in a meeting to keep track of all the evaluations that are done of work or behavior of a particular group within the congregation and then review the above criteria assessing the extent to which each is met.

—Have the people who were discussed been told about the discussion, before and after?

—Has the group which was discussed had an opportunity to describe what was done, why, and how?

—Was there any assessment of the quality of what happened by those who experienced it?

—Had the board talked with the people doing the task before it was done to come to an understanding of what its purpose or goal was?

—Does more weight seem to be given to the peculiarities of a group personality than to what was done and how it was done?

A more thoroughgoing assessment would observe not only one meeting, but would observe several meetings of both the board and the group being assessed. Leaders in each would be interviewed to learn their perceptions of what the group was trying to accomplish, the means used in attempting that accomplishment, and what helped or stood in the way of that accomplishment. Each would be asked what they thought was accomplished and the answers between the two compared. The learning that comes from this evaluation of feedback and communication can then be shared with both the board and the group. Problem solving (see below) could then be undertaken to deal with any issues needing attention that might have come to light.

Another method for assessing a group's feedback and communication process is to use a "PMR," that is, a Post Meeting Reaction form. One such device that has been used for many years by group leaders is that developed by Philip Anderson, called Christian Group Life.[10]

Figure 4–A
## Post Meeting Reaction Form*

This is a checklist to help you evaluate your meeting and to increase sensitivity to some of the relationships in the life of the Christian community of faith.

Check the number on the rating scale that corresponds to your evaluation of the meeting in each of the following categories.

For example, if you feel that responsible participation was lacking, check 1; if you feel that responsible participation was present, check 7; if you feel that the responsible participation of the group was somewhere in between, check an appropriate number on the scale.

| | | |
|---|---|---|
| A. RESPONSIBLE PARTICIPATION was lacking. We served our own needs. We watched from outside the group. We were "grinding our own axes." | 1 2 3 4 5 6 7 | A. RESPONSIBLE PARTICIPATION was present. We were sensitive to the needs of the group. Everyone was "on the inside" participating. |
| B. LEADERSHIP was dominated by one person. | 1 2 3 4 5 6 7 | B. LEADERSHIP was shared among the members according to their abilities and insights. |

*From *Church Meetings that Matter* by Philip Anderson (The United Church Press, 1965), pp. 50-52. Used by permission.

| | | |
|---|---|---|
| C. COMMUNICATION OF IDEAS was poor, we did not listen. We did not understand. Ideas were ignored. | 1 2 3 4 5 6 7 | C. COMMUNICATION OF IDEAS was good. We listened and understood one another's ideas. Ideas were vigorously presented and acknowledged. |
| D. COMMUNICATION OF FEELINGS was poor. We did not listen and did not understand feelings. No one cared about feelings. | 1 2 3 4 5 6 7 | D. COMMUNICATION OF FEELINGS was good. We listened and understood and recognized feelings. Feelings were shared and accepted. |
| E. AUTHENTICITY was missing. We were wearing masks. We were being phony and acting parts. We were hiding our real selves. | 1 2 3 4 5 6 7 | E. AUTHENTICITY was present. We were revealing our honest selves. We were engaged in authentic self-revelation. |
| F. ACCEPTANCE OF PERSONS was missing. Persons were rejected, ignored, or criticized. | 1 2 3 4 5 6 7 | F. ACCEPTANCE OF PERSONS was an active part of our give-and-take. We "received one another in Christ," recognizing and respecting the uniqueness of each person. |
| G. FREEDOM OF PERSONS was stifled. Conformity was explicitly or implicitly fostered. Persons were not free to express their individuality. They were manipulated. | 1 2 3 4 5 6 7 | G. FREEDOM OF PERSONS was enhanced and encouraged. The creativity and individuality of persons was respected. |
| H. CLIMATE OF RELATIONSHIP was one of hostility or suspicion or politeness or fear or anxiety or superficiality. | 1 2 3 4 5 6 7 | H. CLIMATE OF RELATIONSHIP was one of mutual trust in which evidence of love for one another was apparent. The atmosphere was friendly and relaxed. |
| I. PRODUCTIVITY was low. We were proud, and happy, just coasting along. Our meeting was irrelevant; there was no apparent agreement. | 1 2 3 4 5 6 7 | I. PRODUCTIVITY was high. We were digging hard and were earnestly at work on a task. We created and achieved something. |

Groups that use this form at the end of every meeting find that the consciousness of the members is raised: they assess themselves and become their own researcher and purveyor of feedback. The system becomes self-evaluating, then, on an almost immediate basis.

### *4.4.4 Needs, Norms, and Sanctions*

Every organization has a needs process that metes out rewards and, in some cases, punishments. In the formal system, there is often a reward procedure by which, after staff is evaluated (formally or informally), salaries are raised or other compensations given. Often there is formal procedure by which a nominating committee decides who is ready for an appointment to the board, or the board names delegates to a denominational convention. Young people's groups decide who can go on trips. Budget committees decide who gets funded.

In chapter 1, the crisis in the High Ridge Presbyterian Church provides a heated example of the challenge between the formal authority of the session and the very real but informal rewards and punishments among the membership. From the case we cannot tell the relative influence of informal processes that guided their decision and subsequent action. Did they really believe that wine was out of place in the church, or had some members of the board been waiting for an opportunity to cut the "giant" down to size? Did the pastor not know that wine was to be served because he had not nourished an informal network, or because his staff avoided him, or because he might have objected, or because he gets upset with such news in advance? Is this event a surprise, or does this congregation really enjoy a toe-to-toe conflict from time to time (such as attempting to withdraw from the denomination or changing the church school curriculum)? We will not know how to proceed with the High Ridge church until we explore the process issues of needs, norms, and sanctions.

Informally members are rewarded for their participation in the church's life as it meets their needs both personally and organizationally. People participate in church life because they want to grow, because they are looking for friends and a support group, because they are looking for opportunities to serve their Lord and their community, because they want to worship with others who approach liturgy as they do, and many, many other reasons. When one is not able to have these needs met (or, at least the important ones), one is not "rewarded" for participation. This will inhibit full and active participation in the life of that congregation. Thus, the study committee will want to investigate whether dwindling participation or growing dissatisfaction in the congregation is the result of an increasing inability of the church to meet the needs of the members. If the board doesn't know what the needs of the members are, then a needs assessment should be undertaken as described in the next chapter. If the board does not know how to meet the needs, resources should be brought in to help train and guide the congregation to better respond to its members. In addition to those concerns, interpersonal needs should also be explored.

A useful instrument for assessing interpersonal needs is the FIRO-B developed by William Shutz.[11] The name, FIRO-B, stands for Fundamental Interpersonal Relations Inventory–Behavior. It has six scales, measuring each individual's need for:

Expressing Inclusion
    The need to be with people.

Wanting Inclusion
    The need to be invited to be with people.

Expressing Control
    The need to take charge with people.

Wanting Control
    The need to let others decide what to do.

Expressing Affection
    The need to have close relationships with others.

Wanting Affection
    The need to have others act close and personal.

These scales can be easily understood by people using the instrument. They offer immediate feedback to the person taking the instrument and to others in the group regarding individual motivations and their effect on group dynamics. Use of this instrument can be limited to as short a period as two hours or can be the beginning of an in-depth exploration taking several days, depending on how deeply the group and the observers wish to explore the ramifications of need levels in group dynamics.

The FIRO-B provides a way to appreciate each individual's different levels of need with regard to human relationships and to understand how these need levels affect participation. As the group becomes more sophisticated about the various levels of need for each person, it can compensate for and enhance the different levels of motivation within each participant. It can thus increase the ability of the group to get work done more easily and help individuals meet their own interpersonal needs within the group.

For some groups the FIRO-B would be perceived as too personal or threatening. The United Church of Christ in its manual on volunteer systems in churches[12] has an instrument that also assesses interpersonal needs, but is not perceived as quite so "psychological." (See figure 4-B.)

Congregational studies on personal needs and interpersonal dynamics provide a special ethical issue for church leaders. These materials should be presented in ways that are sensitive to the participants' willingness to be vulnerable and to learn in group settings. They should be shared in an atmosphere of mutual trust and common cause. Because such information is not generally available, these instruments may be threatening to individuals and groups. The information must be carefully gathered and positively shared for the best interest of the individuals and the group as a whole.

### *Norms and Sanctions*

In addition to processes for providing rewards, organizations also have means by which they bring

## Figure 4–B

### Personal Preferences

The following chart asks you to express your preferences in relation to two choices. You are asked to mark on the line (a continuum) to indicate which of the two choices is your preference and how strong that preference is.

Example: When asked to become a volunteer in the church or community I prefer:

to be a leader _____ __X__ to be a follower

This person has a relatively strong preference for being a follower and, therefore, probably would prefer being a member of a committee rather than the chairperson of the committee.

If you are attracted to both choices equally, then mark the line in the middle. Please note that not all choices are opposites. You are asked to place only one mark on each line.

When asked to become a volunteer in the church or community I prefer:

| | | |
|---|---|---|
| to be a leader | —— —— | to be a follower |
| simple, routine tasks | —— —— | challenging, new projects |
| an informal fellowship | —— —— | a task group with a clear assignment |
| to do whatever is needed | —— —— | to do a job that is important and respected |
| to work with people I know well | —— —— | an opportunity to meet and get to know new people |
| much responsibility | —— —— | little responsibility |
| to be known as skillful and intelligent | —— —— | to be known as friendly and caring |
| to be liked by others | —— —— | to achieve something significant |
| a job that doesn't require much preparation | —— —— | a job I can prepare for by reading and doing homework |
| to see concrete results | —— —— | to maintain smooth and harmonious relationships |
| to work on a small task or problem | —— —— | to tackle large problems facing the community and world |
| a job where I can witness to my faith | —— —— | a job that will be appreciated by my closest friends |
| a job that will strengthen the church | —— —— | a job that will make my community a better place for the poor and disadvantaged |
| to know what is expected of me | —— —— | to try new things and redesign the job to fit me |

sanctions to bear against those who do not conform to their standards of behavior. In churches these tend to be informal but nonetheless real. Usually it is in the arena of norms and standards that sanctions are brought to bear against members. For a group to hold together it must have norms. It is not possible for people in their various organizational environments to agree formally about all the rules by which they will abide and by which they will judge others within the system. Therefore, every organization has a system of "understandings" by which most of the adherents live. As was noted in chapter 3, in the discussion of the "underlife" of a congregation, these norms are related to a congregation's identity.

One usually does not notice an organization's norms until they are broken—for example, when a deviant enters the system. Some unwritten understandings about congregational life lead "outsiders" to frustration and, sometimes, separation from the parish. Pastors new to a congregation, for example, are sometimes unpleasantly surprised to find that they have offended some members of the congregation or alienated them because they were operating out of a different set of "understandings" about what is appropriate behavior from those that are operative for the parish. One pastor's wife did not wear gloves when she attended a reception for women in the parish. She was shocked the next week to receive, anonymously, a new pair of white cotton gloves in the mail. Another pastor expected to stay in the board meeting when his salary was discussed and was offended when he was later attacked for this "boorish" behavior. Sometimes newcomers find themselves in difficulty when they are "too pushy" in expressing a desire to serve on a church committee. In one church a member was criticized for being an "enthusiast," and in another a newcomer was chastised by a delegation of deacons who thought it inappropriate for him to bring his children to the "adult" worship service.

Gordon Lippit says this about norms:

> As it interacts with the environment, an organizational system will develop expected and prescribed ways of acting in relationship to its goals and objectives. These standards of behavior will be influenced by what has happened in the past as well as new experiences and requirements . . . . To act contrary to the norms may bring severe censorship or even total rejection by the group. Some norms are functional in getting the organization's task done; others may be incidental and nonproductive. Standards may rest on tradition as well as on changes produced by new experiences and requirements. Because norms and values sometimes persist beyond the point where they are functional, some groups and organizations find it useful . . . to periodically make their operative norms explicit. They ask, "Is this the way we really want to behave? What purpose is served by this norm?" Norms and values form the culture in which people work, [live and pray].[13]

The difference between norms and simple behavior patterns is that norms have sanctions or punishment connected to them. Behavior patterns do not. If the behavior pattern is that men do not wear suits to church in the summer but attend in their shirt sleeves, no one will "pay attention" to deviance or try to get nonconformers to dress like the rest. However, if proper attire has the status of a norm, some kind of action will be taken to call the deviant person into conformity with the accepted standard:

"Perhaps you'd be more comfortable hanging your coat in the closet."

"Gosh, aren't you uncomfortable in that coat?"

"You seem awfully formal and aloof from the rest of us when you dress like that."

Of course, norms differ in intensity and importance in an organization. Some relate to things that are quite trivial and unimportant. Others relate to behavior that is absolutely taboo. Wearing ties may be trivial, but sexual advances by married persons toward persons who are not their spouses are strongly governed by powerful norms.

Norms also differ in the intensity with which they apply to different persons within the system. Norms related to assertive behavior (still) apply differently to men than they do to women. Cursing norms apply differently to pastors (and women) than they do to lay men. Breaking dress codes is usually treated with more tolerance when a newcomer does it than when it is an "old hand."

The case of St. Augustine's Episcopal Church illustrates the tension that can be experienced when established norms are broken. The norm had been for music in worship to be in the historically white, Anglican tradition. With the introduction of black gospel music into the service the norm was being broken; and attempts were being made by some of the congregation's leaders, including Father Cummings even though he liked the "new" music, to bring the members back into conformity with the previous standards for worship.

The case also illustrates how the punishments come in response to the breaking of traditional ways of being together:

—making rules against certain music;

—protesting in public about the behavior of members;

—and probably, although the case does not say so, talking about and against one another in "private."

Congregations get into trouble in relation to norms not because they have them but because:

—the norms are changing and are not agreed upon;

—the norms are counter-productive to church health;

—norms that are irrelevant to effective church functioning or that are meaningless to positive human interaction are treated as taboo items;

—the members of the church do not know how to bring sanctions to bear in a constructive way.

For the person or group interested in studying how penalty systems operate within a local church, a first task will be to discover what the norms of the system are. Once they are identified it will be possible to evaluate them in terms of whether they are changing, counter-productive, or irrelevant. The other main task will be to assess whether the members of the church know how to bring sanctions to bear in a constructive way. Let us look first at a means of identifying norms. This can be done much like the process discussed above for uncovering informal contracts. Indeed, norms are a tacit contract members have about their behavior together, and tacit contracts are difficult to "surface" and even more difficult to change.

The first task of norms assessment is best done among persons who know each other, who like and appreciate one another, and who anticipate discovering information about their processes that help them be closer and work better together. Groups in conflict are not likely to be successful at this task because of the low levels of trust and, frequently, low levels of optimism.

One effective method for gathering data involves the use of a case study. The working group should consist of people who know the congregation well and have participated in a recent experience in the church where there was some tension (such as the situation at St. Augustine's over the gospel music or conflict in the Presbyterian congregation over the use of champagne at the wedding reception), and it should have a research leader who will help the group stick to its task. The leader explains to the group that the purpose of its meeting is to study the norms of this congregation and how they affect its life. Then the leader describes what norms are and how they shape life in the congregation—sometimes positively and sometimes negatively. The way they will study these norms will be to review the recent events surrounding, for example, the unscheduled debate at the board meeting about the use of champagne at the wedding and the reactions consequent to it. This review is done by asking the group:

—to identify who was involved;
—to describe what happened;
—to describe their feelings and those of others.

Then the leader of the research team asks what were the written and unwritten rules by which the key actors in this situation were operating. The group is encouraged to identify these in a brainstorming fashion, initially without judgment, challenge, or contradiction. This will enable a freer flow of ideas. As the group begins to warm to the task and the list begins to develop, the leader asks for those items to be removed that are not norms. (It is likely that some first thoughts about norms will result in descriptions of behavior patterns or other nonrelevant statements.)

The leader should then direct the group's attention to the task of analyzing the norms the group agrees are now operating in the church.

—Which norms are changing?
—Are any norms counter-productive to the church's health—especially:
  helping direct and open communication;
  supporting shared and participative leadership;
  helping work get done;
  clarifying responsibilities;
  appreciating differences?
—Are any norms irrelevant or meaningless?

This discussion should yield rich and deepened understandings of how the church is currently functioning.

The other task, of course, is to analyze what sanctions have been brought to bear, or have been threatened, in order to keep members in conformity to group norms. Again, the group is likely to be threatened by this discussion, and the leader will want to keep the group focused on the task of identifying, as objectively as possible, what actually happens in the life of this church.

### *4.4.5 Diversity and Conflict*

When it comes to diagnosing a local church in conflict, the key process questions are mostly informal. Usually—indeed, almost always—congregations have formal systems for managing differences. The constitution or the book of order tells them that they must follow *Robert's Rules of Order*, or that the Bishop must be consulted and his or her decision "will be determinative." These formal processes may reach decisions but also may leave angry and dejected congregants. Many times they do not seem to "get at" what has created the tensions in the first place. Therefore, it is important in conflict to examine carefully who cares about what is happening and how these individuals are relating to one another both within and alongside the formal decision-making processes.

To do diagnosis in a church that the leadership perceives to be in conflict can be problematic in itself. If the leadership is uncomfortable and frightened by the tension, they may not want to get too close to it. They may be especially uncomfortable if persons are in the same room together who have differing opinions or bad feelings. Thus, the leadership may take precautions (sometimes elaborate) to keep people away from each other and to restrict the flow of information.

For example, as tension begins to develop in a congregation, the vestry, board, or session may find that its members are reporting to the board that they have talked to "certain individuals" (who remain nameless) who are very upset. Without knowing who these persons are, it is not possible for the board to know how upset they are or what they will do if they do not get their way. Further, it is not possible for the board to assess the numbers they represent—whether they represent "many" or "most," whether they are active participants or inactive, or whether they represent large givers in the congregation. When the messages come in anonymously, the board has no way of assessing the real extent of dissatisfaction in the congregation. The dynamic of rising conflict seems to push board members apart from one another and chokes off their ability to talk openly with one another and with others in the congregation. The board, if it is caught up in this dynamic, may then accept anonymous information, set itself up as a "secret" committee (not sharing what it has discussed or its decisions with others), and take actions based on information that may be partial and slanted.

This dynamic of organizational tension, which squeezes and distorts information, must be dealt with by the board or other persons obtained to study the conflict, to get a picture that is balanced and realistic. Several precautions, therefore, should be considered before attempting to gather information in conflicted churches.

First, those gathering the information should be, and should be perceived to be, impartial by the members of the congregation. If they have something at stake in the conflict, their judgment is likely to be skewed *and* other members are not likely to be candid with them. Second, these persons should be trained, not only in the art of listening, but also in the skills of patiently probing for clarity of detail, depth of meaning, and full description of what has or has not happened that has generated the tension in the organization. Those who are angry, frightened, upset, or have an axe to grind often find it difficult to assess facts and meanings in a balanced fashion, and, sometimes, they become overimpressed with other's anxieties. Data gathering in conflict settings must include information about how people feel. It must include information about what has happened, what the various groups want, and an understanding of the values that shape their desires.

The third precaution to the persons gathering information in conflict is that, if they have any intention of using this information for helping people deal with the conflict, both respondents and researchers should understand that the information gathered is *not* "confidential." A good deal of what is learned will need to be shared with all of the parties involved so that they will know who has what concerns, as well as the depth of those concerns. If those complained against are going to change their behavior, they will need to know what the "charges" are that are being brought against them. Further, the various parties will probably need to speak with one another about whatever is causing the tension. If the data gatherers cannot reveal who feels what and cannot encourage the various persons to talk with each other, the conflict management process will end with the gathering of data.

Finally, those who are gathering information should make substantial efforts to canvass the *active* membership of the congregation in seeking to understand what is going on in this situation. It is not necessary to hear from those who have long since dropped out (though recent dropouts may have useful information). It is important to work with what is affecting the organization *now* (not what affected it once). Further, it is those who are currently involved who are going to be responsible for "fixing" the situation. To discover the needs and wants of those who have lost their motivation to continue and who may now have commitments elsewhere, may lead the church to develop programs and processes that are not relevant to the current church population.

There are two useful ways to go about getting information in a conflicted church. The data gatherers can be trained to visit in the members' homes or they can invite members to come to the church to small (eight to twelve persons) meetings where the issues will be discussed.

There are some ways that many churches use to gather data in a conflict that are not helpful: mailed questionnaires, large public meetings, hearings. Let's look at each of these methods briefly.

#### *4.4.5.1 Mailed Questionnaires*

The problem with questionnaires is that they do not give the researcher enough information about what is really going on. They can measure feelings or attitudes, but they do not do a very good job helping people express the complexities of the situation that are likely shaping those feelings and attitudes. To get in-depth data, it is important for interviews to be held where dialogue can help people clarify what they are thinking and feeling. Questionnaires do not allow that to happen. Further, much of the data from mailed questionnaires may be anonymous (even though names were asked for). Also the compilation of the data from mailed questionnaires is sometimes treated as a vote, affecting a decision before the various parties have had full opportunity for discussion and problem solving together. In other words, before the leadership and others are given opportunity to study many alternatives, the decision is made.

#### *4.4.5.2 Large Public Meetings*

Likely it is obvious to every reader why large public meetings are not good means for gathering information. However, let us reiterate them here. At public meetings people are often not given ample time to speak fully about their perceptions and concerns, and sometimes the atmosphere of the meeting raises rather than lowers the sense of threat that people have. This often leads to exaggeration and distortion, giving meanings that participants would regret under more comfortable circumstances. Further, meetings sometimes turn into decision-making groups prematurely. Getting reliable data and understanding it takes time and a dispassionate environment. This is often not the case in public meetings, especially where feelings are intense.

*4.4.5.3 Hearings*

Hearings are another poor way to gather data. The way some congregations have done this is to invite members to bring "evidence" to a panel of church leaders who listen to all sides and then attempt to make judgments about who is right or what is to be done. Often these panels are made up of people with good intentions but also with decided points of view: some are on one side, some the other, and some neutral. Hearings put the decision-making power in the same hands as those who are gathering the information. Thus, the people confronting the panel are constantly aiming their remarks to judges who will make our decisions for us.

If the congregation wants to help *manage* conflict (rather than submit it to arbitration), the purpose of data gathering should be to discover who needs to talk with whom and how they will do it in order to work through the conflict. Panels make decisions for others and do not help the people involved to make decisions for themselves. Thus, the way information is collected will strongly affect the results that follow.

*4.4.5.4 Visiting in Homes or Small Groups*

Two better ways to gather information in conflict settings are to talk with people individually in their homes or in small groups to discover their concerns and the extent of their commitment. Home visits will require finding individuals or teams who are neutral and will have the time to visit as many in the church as will see them. A less time-consuming method[14] is to ask groups of individuals to come to the church in small groups of eight to twelve people to share their perceptions and concerns. This can be done on a Saturday, with groups coming in at designated times. In some large congregations it will be necessary to have groups meet on Sunday as well; in small congregations not as many meetings are required.

It is best for each of these groups to consist of people who are fairly compatible with one another, that is, individuals who would feel comfortable talking in one another's presence. When the groups are highly heterogeneous, the conversation often gets focused on one issue or one part of an issue and does not explore the many other facets of what is happening in the church. Further, some people are intimidated by encounters with "the opposition" and either do not show up or do not say anything. It is very important to hear from everybody as fully as possible.

The usual pattern in these meetings is to begin with an introduction of the person gathering the information to explain his or her understanding of the purpose of the meeting and what will be done with the information that is being gathered, and then to ask for any other questions the people may have. Once these questions have been responded to, a very brief questionnaire can be given to the participants. This questionnaire is a means to double-check what the people have said orally and is a way to count the number of responses and concerns that people have, to provide an opportunity for people to communicate about what is positive as well as what is negative, to have some information that is a little more concrete than just the interviewer's memory and impressions of what was said, and to help people get into thinking about why they are in this meeting and how to best express their positive and negative impressions of the church.

The questionnaire usually asks these questions:

—Name.
—Age.
—Groups, programs, committees, activities in which you are now active.
—Frequency of public worship attendance at this church per month.
—Do you now pledge or regularly contribute financially to the general fund of this congregation?
—Why do you attend this congregation?
—What are the strengths of this congregation?
—What are the weaknesses of this congregation?
—If you could change anything in this congregation at the present time, what would you choose as the most important thing to change?

The respondents are asked to write their name on the paper, again to communicate that the interviewer does not want them to perceive their remarks to be anonymous (or, for that matter, confidential). It also makes it possible for the interviewer to go back to individuals who have written things that are not understood to ask for amplification or clarification of their concerns.

It is a good idea to ask for people to tell their age because there is often a myth in the congregation that older members believe so and so and younger members something else. This may be purely a myth, or it may be a fact. Checking it out may help later on.

Asking about worship attendance and giving will give the interviewer information about the respondent's level of activity in the church.

Asking the participants to tell why they attend this church will give the interviewer and those who are attempting to work on the differences some clues about the "glue" that holds people to the church. In some churches it is strong family ties; in others positive relationships that go back many years; in others the fact that the church is near their home; in others the particular faith stance of that congregation. Some of these motives are not very strong for holding people through intense conflict; others will help the members endure severe and protracted confrontation. Answers to this question should help in the development of strategies to deal with the differences there.

The question about strengths of the congregation will not only help to bring understanding of some of the motives for participation of some of the members, but it will also help to assess how much organization and structure there is for a variety of commitments.

The last two questions generate lists of information about the problems that need to be addressed and help some with the level priority that the members attach to them.

Why is it that the interviewer takes all this time to talk to so many people? Would not this process be less costly and have a lower profile in the congregation, if the interviewer just spoke with a few key individuals and tried to work out things between them? The answer is yes and no. It certainly would cost less in terms of information gathering to talk to just a few. But it is likely to not help people work through their differences. One of the most common problems in addressing problems in the congregation is the assessment of the numbers of people who are "upset," or are "dissenters," or want the pastor to leave. Often board members' analyses of the numbers pro and con and their assessment of the commitment of the various pro-and-con parties tend to be exaggerated or understated. An interviewer can help the board and congregation get better data on the extent of polarization than board members might be able to procure.

The interviewing process, whether it is done by board members or a consultant, provides a good opportunity to ask questions about a variety of issues and carefully explore how deeply each person feels about each issue. It is important to note whether people in the church are completely polarized (that is, all members of each faction or party agree about every issue confronting the church) or are only partially polarized (on some issues members of a faction agree and on other issues they do not). An illustration of a partially polarized church would look like this:

| Pro-Sanctuary | Con-Sanctuary | Pro-Inclusive Language | Con-Inclusive Language |
|---|---|---|---|
| Bob | John | Bob | Carol |
| Carol | Mary | Mary | John |
| Ted | Bill | Bill | Jane |
| Alice | Jane | Alice | Ted |

An illustration of a completely polarized church would look like this:

| Pro-Sanctuary | Con-Sanctuary | Pro-Inclusive Language | Con-Inclusive Language |
|---|---|---|---|
| Bob | John | Bob | John |
| Carol | Mary | Carol | Mary |
| Ted | Bill | Ted | Bill |
| Alice | Jane | Alice | Jane |

Sometimes board members are quite concerned as to whether they have input from every body in the church, and they believe they have incomplete or invalid data if not every person has been spoken to. Or some members of the board may believe that they must have a true random sample of the whole membership if they are to have an accurate picture of what the issues are and the level of commitment of various members to each issue. This is not necessary. When one is gathering information in a church about participation and commitment, one is not doing social-science research; rather one is *assessing the current leadership's concerns and points of view*. Therefore, the board should be most concerned that the current leaders and all of the parties or factions of the church are well represented in the sample. Interviewing a random sample gets information from many who have long given up on the church and might well provide information from people who would like to see the church do such and such but are quite unlikely to support it or be a part of its ministries either as a recipient or an actor.

### *4.4.5.5 Diagnosis*

Once the information has been gathered, the following diagnostic questions should be asked by those wishing to understand what is keeping the tension alive.

*Who is involved?* How many? Is it just one person or the whole congregation? Of those who care about the issues, how central are they to the congregation's decision-making process? Are they marginal? Elected to office? Do they have great influence in the congregation?

*What is the arena?* Is this a legal battle, one over which the participants are likely to go to court, or is it one that can be dealt with by two individuals privately? Is it a congregational matter, a board matter, or a committee matter? Sometimes the arena is not public and those concerned about the conflict will want to assess where the conflict has been surfacing—in meetings at church, or in private conversations in people's homes.

*What is the extent of polarization?* Are members highly committed to one side or the other? Is there a large group that has not yet "made up its mind?" Perhaps there are many issues and people that are on different sides on different issues. Though such a church would be highly conflicted, it would not be highly polarized because the same people are not in the same camps on all of the issues.

*What kind of issues are the people dealing with?*

*Role conflict* would have to do with lack of agreement on lay or clergy roles. Structural conflict relates to the formal structure of the congregation where organizational components are to be in conflict with one another, perhaps intentionally, perhaps not. The balance of powers in the federal government is an example of intended conflict, or checks and balances. Sometimes congregations find that deacons and trustees function as a check and balance system—and this may not be desirable to the members.

*Substantive or issue conflict* can occur over goals, processes, questions of fact, or values. Usually there is a significant interpersonal dimension included in these substantive conflicts, but not necessarily so.

*Interpersonal conflict* has its roots in individual needs for recognition, esteem, feeling adequate in another's eyes, feeling valued, needs that are not being met to the satisfaction of some or many within the church. Those examining the conflict will want to explore as deeply as possible the roots of these feelings, because it could be that they come from a sense of inadequacy on the part of those feeling deprived, or it could also be that the feelings come from conscious or unintended distancing on the part of others in the congregation.

*What distortions are occurring in perceptions?* In higher levels of conflict it is difficult for participants to be objective. They tend to see themselves as substantially benevolent in their motives and their opponents as essentially malevolent. They tend to see issues dichotomously, as either/or, right or wrong. They tend to believe they know the true motives of the opposition's behavior, and they tend to greatly exaggerate both the level of threat and the consequences of any actions which are taken or might be taken. The higher the distortion, the more difficult and frightening the conflict will be to those experiencing it.

*How are members communicating?*

Is it one way, "I'll tell you what you need to know, and I will not listen to you"?

Is it public or secretive?

Is it only with those in one camp or with all camps?

Is the communication ample, or spare—leaving much room for speculation?

*What are the stakes and how high are they?* What will happen if one group loses? What will be the effect on them? What will be the effect on the church? Is this an emergency? Is it possible to explore at length the concerns that people are raising?

As the groups concerned explore the answers to these questions, and the dimensions and depth of the conflict begin to become clearer, there will be some reduction in tension just because developing understanding takes some of the anxiety out of the situation, which had previously felt even more chaotic and confusing.

Once the data have been collected and analyzed, it will be necessary to bring together those who have a concern about the issues to help them understand the problems, and search together for solutions that will be meaningful and useful to the individuals involved and the church as a community.

### *4.4.6 Problem Solving*

Much of the literature on problem solving says that effective processes are orderly and rational. For example, Don Koberg and Jim Bagnall[15] have listed the steps in a problem-solving process:

—accept the situation
—analyze the situation
—define the problem
—ideate (brainstorm)
—select
—implement
—evaluate

They believe the place to begin in a formal problem-solving process is with acceptance of the problem. Have those who need to do something about the situation accepted the problem? In other words, is there motivation to work on it?

Once the situation is accepted, it should be analyzed. Information must be gathered from various sources to help one understand the dimensions of the problem—from the political to the technical. Therefore, information will need to be gathered from a reasonable sample within the congregation for there to be a broad enough analysis to make it possible to find those "solutions" that are going to be best for the most people.

Defining the problem, says Koberg and Bagnall, has a great deal to do with the kind of approach that will be taken to solving it. If the problem definitions are not clear or agreed on, the group may have to come back to this step in the process in order to make progress toward solutions. Koberg and Bagnall believe that the problem definition is the bridge between the analyzed facts and attributes we have just discovered and the alternatives and decision making that follows:

We can "conceive" the statement or set of guidelines which expresses our new comprehension of the problem now analyzed; a statement which, like the "eye of a needle," will provide alignment for all decisions after the fact. We have reached the point of declaration.

Our definition becomes the filter for future decisions regarding the problem. And our solution, in the end, will become a physical translation of this statement.

Later on, if we discover the situation to mean different or expanded things, we can always change our mind and try it differently the next time around.

We begin each problem with some basic "definition," which is the sum of our experience to that moment; what we think the problem means as we attempt to describe it at that beginning level of understanding. Then as we progress through the process, our understanding of the situation develops into progressively clearer statements until at last we can say the problem is understood. If the situation occurs again, we either apply the same hard-won previous definition to the new situation or we begin anew, with a higher level of understanding, prepared to progress to even greater levels of understanding.[16]

Ideation or brainstorming is the way groups explore the many alternatives and choices open to them for resolving the difficulty. The best process explores many possible solutions to the problem before choosing one.

The final steps in problem solving are choosing one of the possible alternatives available to the group, putting that alternative to work, and then checking back to see how well the group has done.

Areas where the organization is most likely to notice symptoms that may point to difficulties in the problem-solving process are the following:

*Decisions are not getting made.* At meetings the same issues come up over and over again. People seem stuck without enough information or enough gumption to get on with what needs to be done.

*There is little commitment to decisions once they are made.* The board (or other group) will vote to do something, but nothing comes of it—or no one shows up to help when it comes time to implement the work.

*Decisions are only made by a few.* In voluntary systems, morale and involvement in decision making seem to go hand in hand. When the many don't feel they are participating in shaping the decisions, there may be difficulty with conflict, apathy, or other confusion around leadership.

If these symptoms appear, one area worthy of exploration should be the problem-solving processes currently being used by the church, the board, or subunits within the church. There are several ways this can be approached. The case-study method could be used where persons involved in problem solving and decision making in the congregation could be asked to go back over the history of a recent problem-solving process documenting each step, including who was involved, how they operated, and what each did to help or hinder the process.

Another method would be to ask the investigating team to interview persons involved in the problem-solving process as to what they did and those affected by it as to what their reactions were. This will give insight into the process and its effectiveness. A rather complete interview schedule (it is abridged here for the group leader) was developed by Woodcock and Francis in their book *The Unblocked Boss.*[17] The following statements are for exploration into what was done by the leader:

—identifying the causes of problems
—identifying problems quickly
—asking for help when necessary
—involving others in problem solving
—delegating effectively
—selecting appropriate membership
—setting agendas clearly
—making good use of meeting time
—building an open climate
—drawing out contributions from others
—facilitating consensus
—maintaining discipline
—reviewing the performance of the group
—making good use of meeting time
—listening to the ideas of others
—inviting contributions from others
—leading brainstorming sessions
—displaying information clearly
—identifying information gaps
—seeking new information
—identifying options for action
—evaluating options for action
—deciding what has to be done
—allocating tasks
—coordinating plans
—taking time to review
—discussing errors openly
—identifying ideas for improvement
—giving feedback to individuals
—using checklists to assist systematic review
—developing the team's skills
—improving the use of resources

A final way to explore how well this group is doing its job at problem solving would be consciously to observe itself as it moves through a problem-solving process by appointing one of its members as a process consultant. At a couple of times during the meeting and at the end of the meeting the consultant will give "feedback" on what he or she saw happening and direct the group in an analysis of the process.

Edgar Schein, in his book *Process Consultation: Its Role in Organization Development,*[18] illustrates how this is done in his section on decision making. He says that groups make decisions by six methods:

—by lack of response
—by authority rule
—by minority
—by majority rule: voting
—by consensus
—by unanimous consent

Schein describes how this kind of analysis works, as follows:

> The process consultant must first make the group aware of decisions which it has made and the methods by which it has made them; then he must try to get the group to assess whether they feel that these methods were appropriate to the situation. For example, the members might well agree that the chairman did railroad the decision, but they feel that this was appropriate because they were short of time, and knew that someone needed to make that decision quickly so that the group could get on with more important things.
>
> On the other hand, the group might decide that a decision such as having each person in turn state his point of view introduces an element of formality and ritual into the group which undermines its ability to build creatively on ideas already advanced. The group might then wish to choose a different method of idea production. The important thing is to legitimize such process discussion and to have some observations available in case the group is finding it difficult to discern what the consultant is talking about.[19]

This method proposed by Schein is research and intervention at the same time. It has been very popular with consultants wishing to focus on process concerns because it helps the group become its own consultant as it quickly becomes more conscious of its problem-solving processes.

In this chapter we have explored the function of process as one of the elements of congregational life. We have not explored all of the possible areas of process concerns, but we have looked at several that are commonly problematic in churches and other voluntary organizations. Taken with identity, context, and program (as dimensions of a system), process concerns help to round out our understanding of the way churches function. The way people encounter and deal with one another defines their life together, just as it affects what it is they are trying to accomplish and become. Being faithful means not only being concerned about ends, but the means as well.

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16. Ibid., pp. 59-60.
17. Mike Woodcock and David Frances, *The Unblocked Boss* (San Diego: University Associates, 1981), pp. 31-35.
18. Edgar Schein, *Process Consultation*, pp. 53-57.
19. Ibid., p. 55.

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# APPENDIX 4–1

## *A Church Planning Questionnaire**
*by Grayson Tucker*

In this section of the questionnaire, we are interested in your views and beliefs in a variety of areas. You will find statements about how you see things in your parish or congregation and statements about your religious beliefs. Other items deal with the work of your Pastor. Still others seek your views about Christian education.

In each case, YOUR impressions, feelings, and opinions are important for church planning. In some cases, you may feel that your opinions are not well informed. Please go ahead and give your impression as it is now, even though you realize it could change by talking with others. Use the "Don't Know" response only in those rare cases where you have no impression at all.

For those statements which begin, "Our Pastor . . . ," think of the head of staff, if there is more than one. A summary of these items will be given only to your Pastor to use in planning future growth and development.

In the blank by each of the following statements, write the number from the following scale which best expresses your view:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Tend to Disagree | Tend to Agree | Agree | Strongly Agree | Don't Know |

____ 1. It doesn't matter so much what I believe so long as I lead a moral life.

____ 2. Our Pastor leads worship skillfully, involving the people in a meaningful way.

____ 3. There is a distu.bing amount of conflict in our church.

____ 4. Spiritual matters, and not social or political affairs, should be the concern of the church.

____ 5. My religious beliefs are really the basis of my whole approach to life.

____ 6. It seems to me that we are just going through the motions of church activity. There isn't much excitement about it all among our members.

____ 7. Problems between groups in this church are usually resolved through mutual effort and understanding.

____ 8. Our church changes its program from time to time to meet the changing needs of members.

____ 9. I experience the presence of God in my life.

____ 10. The whole spirit in our church makes people want to get as involved as possible.

____ 11. When conversing with a person, our Pastor listens for feelings, as well as words, and treats feelings as important.

____ 12. The leaders of our church show a genuine concern to know what people are thinking when decisions need to be made.

____ 13. Among most of our members there is a healthy tolerance of differing opinions and beliefs.

____ 14. The stories in the Bible about Christ healing sick and lame persons by His touch probably have a natural explanation.

____ 15. Our church tends to stay very close to established ways of doing things.

____ 16. Christian education takes place primarily in church school classes.

____ 17. Our Pastor has developed a good plan of visitation to members with special needs.

____ 18. On the whole, members have a healthy pride in belonging to our church.

____ 19. Our Pastor helps develop opportunities for church leaders to receive training for their tasks.

____ 20. The main purpose of Christian education is to help people learn to live as Christians in contemporary society.

____ 21. The best Christian education programs are planned by the people who lead them and participate in them, rather than by church publishers.

____ 22. A small group of people seem to make most of the important decisions in our church.

____ 23. Converting persons to Christ must be the first step in creating a better society.

____ 24. Our Pastor is willing to spend extra time and effort to help a committee carry out a job in difficult circumstances.

____ 25. A friendly atmosphere prevails among the members of our church.

____ 26. Our Pastor shows concern for community problems by working with others to help find solutions.

____ 27. Our church tries to adapt its program to changing needs of our community.

____ 28. In preaching, our Pastor consistently relates the message of Scripture to the needs of the people and the world.

____ 29. The behavior of people is determined primarily by the influences of society.

____ 30. Scripture is the inspired Word of God, without error not only in matters of faith, but also in historical, geographical, and other secular matters.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|---|---|---|---|---|---|
| Strongly Disagree | Disagree | Tend to Disagree | Tend to Agree | Agree | Strongly Agree | Don't Know |

____ 31. I sense an atmosphere of genuine care and concern among our members in time of personal need.

____ 32. In important decisions in our church, adequate opportunity for consideration of different approaches is usually provided.

____ 33. On the whole, our people welcome new patterns or styles of worship.

____ 34. There is frequently a small group of members that opposes what the majority want to do.

____ 35. I try hard to carry my religion over into all my other dealings in life.

____ 36. Strangers are usually made to feel welcome and at home in our church.

____ 37. Our Pastor preaches with a sense of conviction.

____ 38. The primary purpose of people in this life is preparation for the next life.

____ 39. People whose times of illness or special need are known by the members are assured of support in prayer.

____ 40. On the whole, I am satisfied with how things are in our church.

____ 41. Persons who serve on our church committees and Board (Council, Vestry, Session, etc.) represent a good cross-section of the membership.

____ 42. I would rather be in a Christian education group where an informed leader uses most of the time to give a presentation, than in one where members are led to study and share their ideas.

____ 43. Although I believe in my religion, I feel there are other things more important in my life.

____ 44. The main purpose of Christian education is to help people know what is in the Bible.

____ 45. As I see it, Christianity should be clear about separating spiritual and secular realms and putting emphasis on spiritual values.

____ 46. Our Pastor shows concern for the church's educational program.

____ 47. Christian education is primarily for children and youth.

____ 48. Our Pastor does good work in counseling persons with special problems.

# APPENDIX 4–2

## *Multiple Staff Inventory* *

### from *Strengthening the Multiple Staff*

#### GROUP 1: Staff Structure

For each statement in this section you are requested to indicate which of four alternative responses most accurately reflects your perception and feelings about your staff. You will have seven points to distribute over the four alternative responses. The higher the number of points assigned to a response, the more completely that response corresponds to your perceptions or feelings.

The following are example combinations:

1. If you think that A corresponds to your perceptions and feelings, then write "7" on the A blank and "0" on the other blanks. Thus: **A** 7 **B** 0 **C** 0 **D** 0
2. If you think A closely corresponds to your perceptions and feelings but B has only slightly less correspondence, then you would write: **A** 4 **B** 3 **C** 0 **D** 0
3. If you think A and B are pretty much the same but C has some slight correspondence to your perceptions and feelings, then write: **A** 3 **B** 3 **C** 1 **D** 0

Distribute the seven points over the four alternative responses in each item of the MSI in the way that best represents your perception and feelings about your staff.

*When you have finished Group 1, check each item to insure that the points assigned add up to seven.*

(1) Goals for ministry are:
- A. Established by leader
- B. Decided by the whole staff
- C. Established by each individual
- D. Sometimes established by whole staff and sometimes by individuals

A____ B____ C____ D____

(2) Meetings are run by:
- A. The leader
- B. A set of traditional rules
- C. Full group agreement
- D. Rotating leadership

A____ B____ C____ D____

*By Gary Anderson, William Berge, William Behrens, George Keck, Joe Wagner, and Wilson Egbert (ed.), © the American Lutheran Church (Minneapolis, MN), pp. 2-4 of the Inventory, pp. 12-13.

(3) Authority:
A. Is primarily a function of rank or position
B. Is primarily a function of expertise
C. Is not very important
D. Is primarily held by the whole group — A____ B____ C____ D____

(4) Meetings are generally used to:
A. Share information
B. Receive and clarify orders
C. Develop staff plans and programs
D. Insure staff cohesion — A____ B____ C____ D____

(5) Jobs are usually:
A. Assigned to individuals by leader
B. Assigned to whole staff by the staff
C. Assigned to individuals by the staff
D. Assigned by individuals to themselves — A____ B____ C____ D____

(6) Staff leaders usually serve to:
A. Coordinate staff activities
B. Direct staff activities
C. Develop activities with staff
D. Don't exist — A____ B____ C____ D____

(7) Agenda of staff meetings:
A. Are developed by the staff during the meeting
B. Are usually routine
C. Are determined and enforced by staff leader
D. Are easily adjusted by staff members — A____ B____ C____ D____

(8) Staff decisions about ministry are made:
A. By leader
B. By voting
C. By group consensus
D. By voting and consensus — A____ B____ C____ D____

(9) Responsibility for success and failure of staff:
A. Is of little concern to members
B. Is held by leader
C. Is sometimes held by staff and sometimes by individuals
D. Is shared fully by all members — A____ B____ C____ D____

(10) Members usually see themselves as:
A. Sharing a relationship
B. Protectors of special interests
C. Advisors to leader
D. Participants in a common cause A____ B____ C____ D____

(11) Congregational programming tends to emphasize:
A. Cooperation between staff members
B. Individual members goals and responsibilities
C. The leader's goals and priorities
D. Search for common goals and shared responsibilities A____ B____ C____ D____

(12) Members work together:
A. Because it is a staff expectation
B. Because cooperation and information exchange are to their best self-interest
C. Because their collaboration is personally satisfying and challenging
D. Because they are required to do so by leader A____ B____ C____ D____

(13) The way the staff functions:
A. Is considered a responsibility of the leader
B. Is generally accepted and given little attention
C. Is examined and discussed by staff
D. Is less important than staff relationships A____ B____ C____ D____

(14) Feedback on individual performance:
A. Is rarely given because the staff holds itself responsible for all performance
B. Is given by staff members
C. Is given by leader
D. Is rarely given because individuals are not responsible to the staff A____ B____ C____ D____

(15) The staff spends most of its energy:
A. Trying to be a model Christian community
B. Trying to help the leader do his/her ministry
C. Trying to help individuals do their own ministries
D. Trying to help the whole team do its ministry A____ B____ C____ D____

# APPENDIX 4–3

## *Role Expectations Checklist**

### *by Rusbuldt, Gladden, and Green*

"The origin of this form is unknown. I received a shorter version from the Rt. Rev. John R. Wyatt, Episcopal bishop of Spokane, who found it being used in one of his churches. I have expanded and revised it, reworked the questions for easy scoring, and have used it many times."

—Paul Beeman

**PURPOSE:**

A mutual understanding of the role which a minister takes and the roles taken by the church members can do much to improve the effectiveness of a church. This checklist is designed to help each person look at what he/she expects of lay members and of the pastor. Each answer expresses a personal feeling. There are no right or wrong answers. Sharing answers among church members and the minister can start a fruitful discussion that leads to mutual goals and expectations.

EXPECTATIONS OF THE PASTOR. In your opinion what should demand the greatest amount of time, thought, and preparation? What should have priority over other activities on the pastor's schedule? Enter your priority ratings for pastors by *circling* the appropriate number for each item.

EXPECTATIONS OF CHURCH MEMBERS. In your opinion what should demand the greatest amount of time, thought, and preparation? What should have priority over other activities for the members of your church? Enter your priority ratings for church members by *underlining* the appropriate number for each item.

| | Priority<br>low — high |
|---|---|
| 1. Relates to sick, dying, and bereaved persons. | 10 9 8 7 6 5 4 3 2 1 |
| 2. Maintains a disciplined life of prayer and personal devotion. | 10 9 8 7 6 5 4 3 2 1 |
| 3. Teaches or works directly with Christian education classes in church school or Bible school. | 10 9 8 7 6 5 4 3 2 1 |
| 4. Does church office work, typing, mimeographing, record-keeping. | 10 9 8 7 6 5 4 3 2 1 |
| 5. Understands how groups work well and helps church groups and organizations function efficiently. | 10 9 8 7 6 5 4 3 2 1 |
| 6. Visits in the homes of church members. | 10 9 8 7 6 5 4 3 2 1 |
| 7. Participates in denominational activities beyond the local church, district, conference or regional work. | 10 9 8 7 6 5 4 3 2 1 |
| 8. Seeks to locate needy persons and families in the community. | 10 9 8 7 6 5 4 3 2 1 |

*Adapted from: *The Interpreter*, Program Journal of The United Methodist Church, vol. 18, no. 5 (May, 1974).

| | Priority: low — high |
|---|---|
| 9. Participates personally in community projects and organizations (such as school boatd, PTA, United Fund Campaign). | 10 9 8 7 6 5 4 3 2 1 |
| 10. Seeks to bring about constructive social change and community improvement. | 10 9 8 7 6 5 4 3 2 1 |
| 11. Leads or assists in public worship. | 10 9 8 7 6 5 4 3 2 1 |
| 12. Reads and studies the Bible. | 10 9 8 7 6 5 4 3 2 1 |
| 13. Teaches special courses or adult study groups. | 10 9 8 7 6 5 4 3 2 1 |
| 14. Works on (or with) church board and committees. | 10 9 8 7 6 5 4 3 2 1 |
| 15. Tries to identify and resolve conflict among church members and leaders. | 10 9 8 7 6 5 4 3 2 1 |
| 16. Calls on new residents and prospective members. | 10 9 8 7 6 5 4 3 2 1 |
| 17. Interprets and implements denominational programs within the local church. | 10 9 8 7 6 5 4 3 2 1 |
| 18. Personally assists victims of fire, flood, injury, injustice, neglect, or unemployment. | 10 9 8 7 6 5 4 3 2 1 |
| 19. Represents the church in local organizations (such as Chamber of Commerce, YMCA, Council of Churches). | 10 9 8 7 6 5 4 3 2 1 |
| 20. Identifies who are victims of social neglect, injustice, discrimination, or prejudice, and helps bring them to public attention. | 10 9 8 7 6 5 4 3 2 1 |
| 21. Studies for, writes, and preaches sermons. | 10 9 8 7 6 5 4 3 2 1 |
| 22. Cultivates a personal social life outside of church activities. | 10 9 8 7 6 5 4 3 2 1 |
| 23. Works with church young people in classes or fellowship groups. | 10 9 8 7 6 5 4 3 2 1 |
| 24. Works on (or with) church budget, finance drive, and building campaign. | 10 9 8 7 6 5 4 3 2 1 |
| 25. Leads or helps the church in the process of setting its goals. | 10 9 8 7 6 5 4 3 2 1 |
| 26. Talks with persons about their spiritual development, religious life, and beliefs. | 10 9 8 7 6 5 4 3 2 1 |
| 27. Explains home and foreign missionary work and promotes financial support from church members. | 10 9 8 7 6 5 4 3 2 1 |
| 28. Encourages church members to help persons in need by contributions, counseling, and tutoring. | 10 9 8 7 6 5 4 3 2 1 |
| 29. Seeks to involve church members in program to help others through organizations (such as | |

| | Priority low — high |
|---|---|
| YWCA, Indian Center, groups for older persons). | 10 9 8 7 6 5 4 3 2 1 |
| 30. Testifies before city council or state legislature committees to correct or improve unjust ordinances or laws. | 10 9 8 7 6 5 4 3 2 1 |
| 31. Counsels people about personal and moral problems and about major decisions of life, such as marriage or vocation. | 10 9 8 7 6 5 4 3 2 1 |
| 32. Maintains prayer and devotions in the family circle. | 10 9 8 7 6 5 4 3 2 1 |
| 33. Serves as summer camp counselor. | 10 9 8 7 6 5 4 3 2 1 |
| 34. Recruits and trains church program and organization leaders. | 10 9 8 7 6 5 4 3 2 1 |
| 35. Seeks to maintain openness among church leaders and members. | 10 9 8 7 6 5 4 3 2 1 |
| 36. Finds ways to witness for Christ in daily life contacts with people. | 10 9 8 7 6 5 4 3 2 1 |
| 37. Serves as an example by generously donating to church benevolences. | 10 9 8 7 6 5 4 3 2 1 |
| 38. Seeks to understand the special needs of minority groups, such as Indians, Blacks, Asians, migrants. | 10 9 8 7 6 5 4 3 2 1 |
| 39. Is an active member of a service club (such as Rotary, Lions). | 10 9 8 7 6 5 4 3 2 1 |
| 40. Speaks before church, community, and civic groups, on radio or TV, regarding problems and needs in the community. | 10 9 8 7 6 5 4 3 2 1 |
| 41. Provides for baptisms, Communion, weddings, and funerals. | 10 9 8 7 6 5 4 3 2 1 |
| 42. Serves as an example of higher than average moral and ethical character. | 10 9 8 7 6 5 4 3 2 1 |
| 43. Conducts or assists in church membership or confirmation classes for youth and adults. | 10 9 8 7 6 5 4 3 2 1 |
| 44. Supplies main ideas and sets directions for the church. | 10 9 8 7 6 5 4 3 2 1 |
| 45. Leads or helps in evaluating the past year's programs. | 10 9 8 7 6 5 4 3 2 1 |
| 46. Seeks the commitment of persons to the Christian life and to church activities. | 10 9 8 7 6 5 4 3 2 1 |
| 47. Promotes interchurch cooperation in the community. | 10 9 8 7 6 5 4 3 2 1 |
| 48. Organizes church programs to assist persons in need. | 10 9 8 7 6 5 4 3 2 1 |

| | Priority low — high |
|---|---|
| 49. Serves on the board of a social agency (such as Goodwill Industries, Salvation Army, Rescue Mission, YMCA). | 10 9 8 7 6 5 4 3 2 1 |
| 50. Works personally for the election of good candidates for public office. | 10 9 8 7 6 5 4 3 2 1 |

OTHER THINGS I EXPECT OF THE PASTOR:

OTHER THINGS I EXPECT OF THE CONGREGATION:

## SCORE SHEETS

The questions in the Checklist are divided into ten categories of five questions each, dealing with different aspects of the life and work of church members and ministers. To compare scores among members or between members and the minister by various categories, simply write in the priority number you *circled* for Question 1 on the line beside Question 1 under the "Pastor" column on the next page.

Write the priority number *you underlined* on Question 1 under the "Lay" column for Question 1 below. All questions ending in "1" deal with the priestly aspects of the ministry. You may add each column to show how highly you rate priestly functions for your pastor and how highly you rate them for the laypersons of your church. Do the same for the other functional areas.

| 1 Priestly Ministry | | | 2 Spiritual Life | | | 3 Christian Education | | | 4 Church Leadership | | | 5 Group Process | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Pastor | Lay | | Pastor | Lay | | Pastor | Lay | | Pastor | Lay | | Pastor | Lay |
| 1. | ___ | ___ | 2. | ___ | ___ | 3. | ___ | ___ | 4. | ___ | ___ | 5. | ___ | ___ |
| 11. | ___ | ___ | 12. | ___ | ___ | 13. | ___ | ___ | 14. | ___ | ___ | 15. | ___ | ___ |
| 21. | ___ | ___ | 22. | ___ | ___ | 23. | ___ | ___ | 24. | ___ | ___ | 25. | ___ | ___ |
| 31. | ___ | ___ | 32. | ___ | ___ | 33. | ___ | ___ | 34. | ___ | ___ | 35. | ___ | ___ |
| 41. | ___ | ___ | 42. | ___ | ___ | 43. | ___ | ___ | 44. | ___ | ___ | 45. | ___ | ___ |
| Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ |

| 6 Evangelism and Witnessing | | | 7 Work Beyond Local Church | | | 8 Service to Needy Persons | | | 9 Work Through Social Agencies | | | 10 Personal Agent of Social Change | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Pastor | Lay | | Pastor | Lay | | Pastor | Lay | | Pastor | Lay | | Pastor | Lay |
| 6. | ___ | ___ | 7 | ___ | ___ | 8. | ___ | ___ | 9. | ___ | ___ | 10. | ___ | ___ |
| 16. | ___ | ___ | 17. | ___ | ___ | 18. | ___ | ___ | 19. | ___ | ___ | 20. | ___ | ___ |
| 26. | ___ | ___ | 27. | ___ | ___ | 28. | ___ | ___ | 29. | ___ | ___ | 30. | ___ | ___ |
| 36. | ___ | ___ | 37. | ___ | ___ | 38. | ___ | ___ | 39. | ___ | ___ | 40. | ___ | ___ |
| 46. | ___ | ___ | 47. | ___ | ___ | 48. | ___ | ___ | 49. | ___ | ___ | 50. | ___ | ___ |
| Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ | Totals | ___ | ___ |

## WHAT NEXT?

Now go back to the questionnaire. Discover those questions which influenced the scores in special ways. In small groups, with the pastor present, try to develop an understanding and even a consensus as to what the pastor and the members reasonably ought to expect of themselves and of each other.