CHAPTER 5

Program

5.1 Introduction

The purpose of this chapter is to examine the relationship between program and the other dimensions of congregational life and to describe specific methods for studying and evaluating the program of a congregation.

Program, as defined earlier in this handbook, consists of those organizational structures, plans, and activities through which a congregation expresses its mission and ministry both to itself—its own members—and to those outside. Program gives concrete expression to beliefs and norms held by members, present and past; it carries the values to which members commit financial resources and energies. Program is the plan of action, what a congregation does.

This chapter is deliberately placed near the end of the handbook for two reasons: (1) to emphasize the relationship of program—be that positive or negative—to other dimensions of congregational life and (2) to alert persons engaged in congregational studies to the tendency for program issues to dominate the study process to the exclusion of other dimensions.

Congregations generally provide more visible clues about program than they do about their identity or process. This explains why, from a research perspective, program is often the most accessible dimension of congregational life. Program descriptions are usually what local churches set forth in their official communications with both members and persons in surrounding communities. For instance, churches' advertisements in newspapers characteristically describe their most prominent programs such as services of worship, special speakers, and seasonal events. They seldom mention contextual features or relational qualities although these have been shown to be important criteria for persons considering membership in a particular congregation.[1] The activity aspect of program is also what a congregation may most prominently display through posters in foyers, hallways, and assembly rooms. These seem more likely to capture the attention of members and visitors than the visual representations of identity found in the furnishings and sacramental objects of sanctuaries.

Program provides the terms for description, in part, because it is the dimension around which church members are most likely to organize both corporate activities and individual participation. Traditionally, congregations have structured their activities around a combination of the liturgical calendar and the *program calendar*. For example, education and stewardship emphases are scheduled in the fall; mission programs in late winter or early spring, and observances of Advent and Christmas claim appropriate blocks of time. Many congregations across the country, regardless of denomination, are engaged in the same kinds of activities at the same time of year.

The organization of the congregation's schedule and resources around program is reflected in most annual reports. A year's worth of investment, interaction, caring, and, in some cases, conflict is reduced to summaries of *activities* and associated costs.

These highly visible program activities can provide the researcher with important data about less visible dimensions of congregational life. However, in isolation from other dimensions, study of program can lead to inappropriate conclusions and premature closure of the research endeavor. The researcher must ask the question, "What is the relationship between the program and other dimensions of congregational life?" Program activities *may not* be a direct extension of values expressed in statements about identity.

Why study program as program? Primarily, to help the congregation and its leaders make decisions about what the church does: use of resources and energy, starting new things, ending old ones, and facing new possibilities. Persons in leadership positions face such decisions constantly. Sometimes the choices are clear and decisions are easily made. Often, insufficient information is available to make decisions between alternatives, or there is a desire to know whether one particular course of action may be better than another.

Among the questions that program studies of congregations ask are:

+ How are resources used? How are finances and human energy allocated among the various activities?
+ What is the "fit" between existing programs and the needs of members?
+ How do the goals of members correspond to current programs and use of resources?
+ What is the "fit" between existing programs and the need of members to minister to persons beyond the congregation?
+ How well do existing programs accomplish what they were initially intended to do?
+ Do programs have effects other than those for which they were intended?
+ Given more resources, would the congregation (1) expand existing programs, (2) create new programs?
+ If a congregation senses a need to change some program, should it (1) stop doing the activity entirely, (2) modify the way it is currently done?
+ How do participants feel about particular programs? Do they help them realize their potential as persons, whether as providers of ministries or recipients of ministries?

The programs of congregations can be studied in a variety of ways. This chapter will describe two basic types, *needs assessment* and *program evaluation*.

5.2 Getting Started with a Program Study: Basic Decisions

Both needs assessment and evaluation can be effective regardless of a congregation's size or the nature of existing program. Both are usually used in the context of a planning process, but that process need not be elaborate or even encompass every aspect of a congregation's program. An evaluation may be limited to only one program and a needs assessment to only one aspect of program activity.

5.2.1 Qualitative or Quantitative Data?

Needs assessment and program evaluation each employ the standard methods of social science described later in chapter 6. Neither is a methodology in itself; therefore, in either type, the researcher or study team will need to decide on the type(s) of methods to be used in data collection.

Quantitative measurements offer the advantage of results that can be aggregated for analysis and compared between groups (such as relative learning achievement of two classes using different curricula) or within a group (such as differences in opinion along age lines within a group engaged in the same activity). These measures are systematic, standardized, and easily presented.

Qualitative measures gather another kind of data. The findings are usually more detailed and variable in content. This methodology provides more depth, expresses what people say in their own words, and is deliberately open-ended in order to discover how people attach meaning to their lives, experiences, and interactions.[2] Qualitative measures represent an inductive approach, a methodology that asks questions without imposing set categories of responses. They do not allow researchers to manipulate the setting and allow for evaluation of program in its own context.

But qualitative techniques have disadvantages. This type of research is labor intensive and often costly. Furthermore, not all situations for data collection lend themselves to qualitative methods. Qualitative methods presume that activities can be observed and that respondents can articulate their experiences. This is not always the case.

If the leadership of the congregation does not, or cannot, retain a consultant to assist with a program study, the method of data collection may depend upon the amount of time the volunteer study team members can give. This is not the ideal criterion for determining the research method. The more professional the study, the greater flexibility in methodology and the more information the leadership will have for interpretation.

Since no perfect methodology exists, any choice involves trade-offs in time, accuracy, detail, or rapport with respondents.[3] These trade-offs need to be weighed by the researcher/study team in designing a program study as is the case with other types of congregational study efforts.

Users of this handbook will find that quantitative data collection techniques are emphasized in the part of this chapter on needs assessment. This is the case because such approaches are more common in needs assessments of congregations and, consequently, more instruments utilizing quantitative measures are available. Furthermore, needs assessment often aims at gathering information from as many persons as possible within a congregation's service area, a process that generally requires a quantitative approach to data collection.

Quantitative measures are typically used when evaluation has as its goal the measurement of outcomes against some prespecified standard, such as with educational testing. But this will not be the interest in

many congregations undertaking program evaluation or needs assessment. Therefore, in order to ascertain the context for program and the relationship of a program's effectiveness to other dimensions of congregational life, qualitative approaches to data collection are often required.

5.2.2 Timing

The timing of a program study process is related to the type of study undertaken. The type, in turn, is determined by the information needs at the time. Evaluation and needs assessment are naturally related, but each is useful at different times in the planning cycle of a congregation. A needs assessment is usually done only periodically, perhaps every three to five years, because changes in the characteristics of persons/ groups with specified needs are generally not measurable over shorter time frames. (Exceptions to this rule would be found in places undergoing significant social or economic upheaval.) The timing of evaluations is related to the needs of congregations to make decisions about the effectiveness of specific programs, thus evaluation would probably occur with greater frequency than needs assessments.

Needs assessments are conducted at times when congregations are unsure about the directions they should be taking programmatically or when they sense that existing programs do not address existing needs. Vacancies in the pulpit or in program staff positions are among the natural points in the life of a congregation when such openness to new directions may occur. Such transitions give the congregation unique opportunities to reexamine program activities in light of membership needs and community context rather than in terms of the skills or personalities of specific individuals, including professional personnel.

Another point at which needs assessment is appropriate is when a congregation is experiencing lethargy or stagnation. Congregations can give reasons for a lack of vitality or growth. These reasons include aging membership, membership loss, the entry of women into the work force with a concomitant decline in volunteerism, and competition for members' time by other institutions. In attempting to regain vitality, some congregations adopt strategies that sound good but may not correspond to the actual need or the realistic potential. For example, a church with an aging or declining membership may decide that its renewal depends on a new youth ministry. That may prove to be the case, but it may also be true that the congregation has a paucity of young people simply because the immediate community has few adolescents. A youth ministry may not be in order because it is impossible. A

needs assessment would provide the kind of information necessary for this sample congregation to understand its context and select program strategies that fit possibility.

5.2.3 Who Should Be Involved?

This is a two-part question: (1) who will be involved in formulating the research design, and (2) who will be the audience(s) for the research? Put another way, who will pose the questions and who will answer them?

1. The issue here is not whether to use a consultant in the study process. Rather, the decision concerns the choices of persons beyond the congregation's leadership and the study team who could be helpful in shaping the study and formulating research questions. Some possibilities to be considered by the team include:

The *expert* who has a specialized understanding of the program or problem being studied and who can contribute to the study by sharpening questions, suggesting additional lines of inquiry, and providing information about standardized measures of user need or program effectiveness.

Friendly critics—outsiders who have the trust and respect of the study team and a knowledge of the congregation. Such persons may be able to look more objectively at programs than can those who have a role and an investment in the existing activities. The study team might invite friendly critics to comment on either the proposed study process or on specific programs being studied.

Nonparticipating members (sometimes called hostile critics) who bring a perspective that may illuminate the unsatisfactory aspects of existing programs or pinpoint the needs of members that have not been successfully addressed.

Of course, program leaders, both professional and volunteer, should be consulted about the research design and the questions. Especially helpful might be persons who had a role in developing a general program direction or a specific activity. If a particular program is to be evaluated, program leadership in other areas whose work could be affected by a new initiative should be involved. For example, suppose a congregation is considering the possibility of a day care program. This should not even be investigated without extensive consultation with staff or volunteers responsible for the Sunday or church school program, because the shared use of facilities and equipment would likely be necessary.

2. From whom should data be collected in a congregational program study? A survey strategy for an evaluation would normally be selective while one for needs assessment would strive toward inclusiveness,

especially in the early stages of program planning. In needs assessment, a major part of the goal is to measure the breadth of a congregation's concept of "service area," that is, potential participants in its program. A needs-assessment design may include the gathering of data on the community beyond the congregation, and some of this can be obtained by consulting census and other secondary data already available. The study team may also want to interview representatives of community groups that might want to take advantage of programs. This will provide qualitative measures of experiences, attitudes, and interest in church programs.

In needs assessment, the collection of information from as many potential users as possible is important to ensure that the data represents the diversity found within the membership and the surrounding community. One inherent value of this approach is in giving a voice to the voiceless. It affirms a belief in fairness and equal access to resources and in decision making. Questioning everyone gives those who feel powerless or disenfranchised the same opportunity to affect change as those in power positions. Once the study team has narrowed its focus and identified specific program possibilities, additional information may be in order from a smaller group that appears to be the target audience for a program.

5.3 Program Research Strategies: Needs Assessment

5.3.1 Definition and Purpose

The term *needs assessment* has become a catch-all encompassing many usages and meanings. The former U.S. Department of Health, Education, and Welfare defined needs assessment as a process for identifying needs, setting objectives, setting priorities, and relating them to programs on a continuing basis.[4] This is a useful definition because it describes a process in which data collection is only one stage. While data collection for its own sake, or for replicating findings from other studies, is common in academic and other research settings, we assume that the gathering of information by a congregation is a means to some specified end. The research is linked to a broader planning process in which identified needs are addressed through strategic activities.

The purpose of a congregational program needs assessment is to identify the following:

+ the needs of the congregation to be considered from the perspective of what is understood to be fidelity to the gospel;

+ the needs of persons to be ministered to within the congregation;
+ the needs of persons to be ministered to beyond the congregation;
+ the needs of members to fulfill their own unique understandings of ministry;
+ the resources, both human and financial, available to address the needs identified.

In addition, needs assessment is a means of making the congregation more sensitive to persons and groups about whom God cares but who may not be readily visible to members.

Some church people object to the idea of a congregation engaging in needs assessment because they equate the process to that of a consumer demand analysis. To such persons, needs assessment suggests a reactive response, the lack of a sense of the church's purposes in all times and places, a "knee-jerk" approach to ministry and mission. This negative response is not confined to religion. Critics of needs assessment say that needs are socially or contextually defined, representing a limited view of what individuals or groups see as a need at a given moment in time.

Such criticism should not be taken lightly. It is a warning about the limitations of any social research; however, many congregations, along with other organizations providing human services, have found needs assessment helpful in clarifying future directions for ministry and for affirming the validity of existing programs or making improvements in them.

A definition of *need* that can be usefully applied to the concerns of the church is "any identifiable condition which limits particular individuals or communities from realizing their full potential."[5] The unfulfilled needs of a congregation as a group or as individuals limit potential for realizing personhood as creations of God and inhibit abilities to fulfill unique ministries. In addition, some congregations are in a position to address other basic human needs related to social or economic conditions or to health. For example, food or shelter programs are well within any definition of ministry.

A congregation usually does not have the resources to respond to all the needs of its members, let alone of persons in the surrounding community. Nevertheless, an awareness of needs allows the congregation to focus the use of resources where the most good can be done. Needs assessment also helps in applying program resources to levels of need.

An open attitude to what constitutes a "legitimate" need is important in seeking to identify the needs of church members and other persons for whom the congregation has concern. At least, openness should be

attempted. Otherwise, a patronizing attitude will be communicated to those from whom the researchers are seeking information, and respondents will not be inclined to answer honestly.

The needs assessment process involves the following general steps or stages:

1. *Identify the area of research (scope of the study)*. What types of information will be collected? Who will be surveyed: members, persons in the community, denominational officials, others?

2. *Identify roles, functions, or responsibilities*. Who is involved in carrying out the process and what are their assignments? Who does what?

3. *Collect data*. This means finding out about needs and resources through various data collection methods.

4. *Measure and rank*. This involves decisions about the assignment of values to needs.

5. *Set priorities*. This task rates needs in relation to other factors of the congregation's context, identity, beliefs, norms, and values; identifies the cost of meeting needs and making comparisons with resources; and determines the order in which needs might be addressed given the resources.

6. *Translate needs into program*.[6] Some of these steps, such as the identification of the audience, have been addressed above, and some will be discussed in greater detail below.

5.3.2 Scope

Needs assessment has the potential for being a *change-oriented process*. Determining the scope of the study begins with the researchers identifying its purpose and mandate from the congregation and answering the questions, "What are we willing to change?" and "What are we able to change?" The first relates to the theological context in which decisions are being considered, to the congregation's relationship to a parent denomination and to the world views of members who might be affected by change. The second has to do with some of the same issues but also with external limitations and with available resources.

The study team should bear in mind that while information may be interesting, it is not useful in and of itself. The purpose of data collection is to assist the congregation in making better decisions: to either affirm what it is doing or to create something more appropriate. The scope must be determined by the decisions to be considered and made. Naturally, the research method should leave room for persons to tell the researchers things the design team may not have thought to question about programs.

The remainder of this section will focus on decisions related to data collection procedures. The final stages of a needs-assessment process have less to do with the model of research and more to do with how information is used. Those final stages will be touched on briefly but are not the main focus here.

5.3.3 Data Collection

Membership characteristics and facilities are two areas of information about the internal context from which it is possible to deduce much about the program needs and potential of a congregation. Data collection instruments used in congregational needs assessment often focus on these areas.

5.3.3.1 Membership Characteristics.

The two aspects of membership characteristics that are most frequently examined in needs assessments are (1) factual, descriptive information about respondents' backgrounds (age, sex, educational level) and (2) opinions about subjects related to the matters under consideration in the future. Quantitative measures are often used to obtain information about backgrounds to develop a congregational profile. The range of responses is predetermined by the researcher so that the data can be easily aggregated and comparisons made within or across subgroups of the total membership. Certain opinions, experiences, and feelings can also be examined by means of quantitative measures.

A considerable literature has developed on congregational studies carried out in different denominational contexts. A review of instruments used (some of which are found in the appendix to this chapter and in the General Appendix) indicates the most frequently examined background variables. These are:

+ gender
+ age
+ race and ethnicity
+ marital status
+ educational attainment
+ occupation
+ employment status (retired, part-time, and so forth)
+ income
+ number and ages of children (when applicable)
+ number of years in current residence or community
+ distance from residence to church
+ home ownership
+ household living arrangement
+ likelihood of moving in the near future
+ number of times moved since age 18

+ hobbies
+ special skills or expertise
+ involvement in other voluntary organizations

Typical background factors about members' religious upbringing and current involvement in the church include:

+ length of membership in the congregation
+ frequency of attendance at worship
+ extent of involvement in activities beyond worship
+ leadership roles held in congregation
+ number of hours spent in church-related activities in a typical month
+ amount of financial support
+ whether level of involvement has changed in last few years and reasons for change
+ number of close friends who also belong to the congregation
+ whether the member has invited others to visit or join congregation
+ previous denominational affiliation, if any
+ denomination in which respondent was raised
+ importance of church activities to respondent
+ importance of religious beliefs
+ frequency of Bible reading and prayer

How is such data on membership characteristics used in a congregational program study process? Several realities pertinent to church program and to its decisions about the future are informed by this data. Key among such realities are (1) membership age profile, (2) family organization and related life-style matters, and (3) occupational and socioeconomic patterns.

Age. Basic questions here concern the age profile and the relation of current programs to the needs of differing age groups. What are the trends in the age profile? Are these trends likely to change in the foreseeable future?

Trends in the age structure of the United States are well known and need not be treated in depth, especially since they do not necessarily translate directly to the specific membership characteristics of any particular congregation. Generally, congregations of the older, mainline Protestant denominations are comprised of a growing number of adults in the middle and later stages of the family life cycle. Other congregations, including some mainline Protestant churches, are not experiencing the phenomenon of an aging membership.

Congregations have tended historically to direct their resources and orient their facilities around age-specified needs of young children, adolescents, and families in the child-rearing stage of the family cycle. A

fundamental question in any program study is, "How well do current program activities fit the needs of the current age profile." Program strategies that work for a congregation with one age profile will not necessarily be appropriate for another.

Curiously, members are often unconscious of the age-profile dimension of a congregation's characteristics, although visually it is one of the most obvious realities. For example, members often fail to notice that the large youth program functioning ten years earlier has virtually vanished. This may result in part from the fact that so many church programs are conducted along age lines and persons taking part in separate activities do not often have an opportunity to observe the spectrum of ages and their distribution in the congregation as a whole.

Patterns of family organization and related data. Historically, congregations have been structured around the values and norms of that pattern of family organization we call the "nuclear family," that is, the household unit comprised of a mother, a father, and their children living together. This concept of family is deeply embedded in most church programs, both in the way age-specified activities have been undertaken and in the functional logic of the congregation's thinking.

The nuclear family is still assumed in most church programs despite all that has been written about changes in patterns of family organization in the United States. As is well known, the country has greater numbers of persons living together without marriage, later age at first marriage, soaring rates of divorce and remarriage, numerous single-parent households, and a generally aging society. Congregations have been slow to respond to these changes, in part because those persons who have quietly departed are often precisely those whose family circumstances mirror the new patterns. They no longer feel comfortable or welcome in churches set up for nuclear families. A recent study shows that the profile of persons outside the church is more likely to be one that does not fit the traditional family pattern.[7]

Norms and values assuming a nuclear family are not articulated within congregations so much as they are built into the program structures. Changes in the domestic life of members unavoidably have an impact on their feelings of acceptance. (As a research topic, the experience and feeling of members concerning family patterns would be best approached by the use of qualitative measures.)

Without arguing for the intrinsic value of any particular form of the family, we need to recognize that many programs should be reinterpreted to relate to the needs of persons in living arrangements radically different from the norm of even two decades ago. The

availability of volunteers for churches has been dramatically affected by changing family patterns. Increased single-parent households means fewer adults who can leave the children with a spouse to take part in church meetings or activities. And the very nature of "single" within the congregation has changed. Today "single" includes not only older, widowed persons but persons who have not married, young and old, or who are divorced or separated.

Proposals that congregational programming should take account of changes in family life cause controversy in some communions, especially in those with a theology placing a high value on traditional male-female and parent-child relationships. Such orientations are even skeptical of church-provided child care, since any option that does not conform to the nuclear pattern is seen as a threat to the inherited morality. Changing family patterns are not likely to weigh heavily in the program decisions of congregations adhering to strict sex-role definitions.

Occupational and socioeconomic characteristics. Certain quantitative questions included in a needs-assessment survey will help us to understand more about the work lives of members, their resources, and their capacities in ministry. Such factors are not always easy to ascertain from observing members at worship on Sunday morning.

Census and other secondary sources can supply information about the kind of work available in the community where the church is located. These same sources can tell the study team about the general educational levels of people in the area. In many cases, general occupational information on members is well known or self-evident and need not be studied. It may be necessary to gather other, more personal and specific information from members in order to learn how economic and occupational circumstances affect daily lives. For example, how many households in the congregation have more than one adult in the work force? Are local industries organized around shift work? How many families have parents working different shifts? What arrangements, if any, must be made for child care while parents work? How much free time do adults in the congregation have? How many teenagers work while also going to school? Is unemployment a problem in any age or occupational group?

Researchers may assume that a major change in the occupational profile of the congregation will be the increased number of women in the work force outside the home. This trend may be associated with new needs of families, including access to child care. The increase of women in the work force is sometimes regarded as having a negative impact on the congregation by decreasing the availability of volunteers and also

putting church participation in competition with limited time for family activities. At the same time, an increase of salaried members could have a positive impact on stewardship programs and could challenge a congregation to look for another kind of volunteer—the retired, perhaps—and thereby expand the base of participation. A membership survey should determine how many retired persons are in the congregation and what kinds of programs they want for themselves and programs for others in which they might work.

5.3.3.2 *How to Ask Questions*

Any question can be asked in a variety of ways. The research team will need to determine the style it wants to use. Sensitivity is especially important in making inquiries about personal matters, such as marital status or income.

Here are some examples of how to ask about marital status:

Are you currently—married, widowed, divorced, separated, or have you never been married?
1____married
2____widowed
3____divorced
4____separated
5____never married
(From the General Social Surveys, 1972–1983.)

Or,

What is your present marital status?
1____single, never previously married
2____single, married previously
3____married once, living with spouse
4____married once, separated from spouse
5____married more than once, living with spouse
6____married more than once, separated from spouse
7____widowed, not remarried
8____divorced, not remarried
(From the LCA Nurture Study. See Appendix 5–1.)

But another, simpler, and perhaps more sensitive way to put the question is:

Are you married or single?
1____single 2____married
If currently single, have you ever been married?
1____yes   2____no

Many people are uncomfortable when asked if they are divorced or separated, especially in a religious

context. The research team should decide on the degree of specificity with regard to such personal issues and not ask more than is pertinent to the study.

Age and income can also be matters of sensitivity. Each can be handled by providing range options, such as this sample question on income:

What is your (or your family's) income range?
1____under $7,500 annually
2____$7,500-14,999 annually
3____$15,000-24,999 annually
4____$25,000-34,999 annually
5____$35,000-49,999 annually
6____$50,000-74,999 annually
7____$75,000 or more annually

Or, you could simply ask,

What is your (or your family's) gross annual income?
$_____

Questions about personal beliefs, social and political attitudes, and opinions about congregational life are also usually included in needs-assessment questionnaires. The following subsections discuss these topics.

Personal beliefs. Information on how members interpret Scripture and describe their own religious faith is helpful in a needs assessment as well as in studies of a corporation's identity, as was noted in chapter 2. A variety of instruments can be used. Here are three samples in addition to those in chapter 2:

Which of the following best expresses your belief about God?
1____I do not believe in God.
2____I really don't know what to believe about God.
3____I do not believe in a creating and saving God, but I believe in a higher power of some kind.
4____God is the creator of an orderly world but does not now guide it or intervene in its course of affairs or the lives of individuals.
5____Although God has acted and can act in history and can communicate with persons directly, it is not something that happens very often.
6____God is constantly at work in the world from "above" directing people, nations, and events.
7____God is in the world and in every person, thing, and event.
(From the Parish Profile Inventory. See General Appendix.)

In the next example, respondents were asked to indicate whether they "agree strongly," "agree somewhat," "both agree and disagree," "disagree somewhat," "disagree strongly," or "have no opinion" on the individual statements.

In terms of my personal situation or viewpoint:
____I believe my relationship to God has importance for my life after death.
____I believe my relationship to God has importance for my life here on earth.
____I imagine God to be mostly like a caring friend.
____Much of my daily life with my family or work is different because of my faith in God.
____I would be disappointed if my children changed to a non-Lutheran denomination.
____Because of the pressures of the world, what I need from God is comfort and consolation.
____Experiences in church are the most important sources of my sense of trust in God.
____My experiences in church have helped me accept the fact that other people are considerably different from myself.
(From the LCA Nurture Study. See Appendix 5-1.)

The same Lutheran study contains this question:

Which of the following statements comes closest to expressing your view of life after death?
1____I don't believe there is life after death.
2____I am unsure whether or not there is life after death.
3____I believe that there must be something beyond death, but I have no idea what it may be like.
4____There is life after death but no punishment.
5____There is life after death, with rewards for some people and punishment for others.
6____None of the above expresses my views.

Other examples of such questions can be found in the Parish Profile Inventory, Section III, "Personal Beliefs" and are also scattered throughout that portion of the Lutheran Nurture Study called "In Terms of My Personal Situation and Viewpoint." Certain of these approaches to the identification of beliefs are applicable to congregations of virtually any denomination. On the other hand, questions about beliefs must often be custom-tailored to the theological context of the specific congregation in which they are asked. More than any others dealing with membership characteristics, questions about beliefs involve a value-laden process of interpretation. A pivotal consideration in formulating the questions is that of how the information will be used.

Social and political attitudes. This category of membership characteristics is helpful because of the relationship between religious profiles and other areas of

behavior and belief. Most such questions that have been used in congregational studies focus on issues that tend to divide persons on the "liberal" to "conservative" political spectrum. They examine attitudes on topics of personal freedom, such as abortion, use of marijuana, and sexuality, as well as social and political issues such as disarmament, nuclear weapons, racial integration in schools, equal employment, and the like. One national survey that included questions on social and political awareness was a 1978 study of "unchurched" Americans. Findings from that study have contributed greatly to an understanding of differences between churched and unchurched individuals.[8] The use of some questions on social and political attitudes in a congregational needs-assessment study might identify differences in the perspective of groups frequently in conflict over program directions and use of resources.

Examples of this type of question are:

Do you Strongly Agree, Agree, Disagree, or Strongly Disagree with the following statements?
——The United States should freeze production of nuclear weapons regardless of what Russia does.
——The use of marijuana should be made legal.
——The law should allow doctors to perform an abortion for any woman who wants one.
——It is wrong for a person to have sexual relations before marriage.
——We are spending too little money on welfare programs in this country.
(From the Parish Profile Inventory. See General Appendix.)

Or,

How would you feel about a program that requires all young women to give one year of service to the nation—either in the military forces or in non-military work such as in hospitals or with elderly people. Would you strongly favor it, probably favor it, probably oppose it, or strongly oppose it?

Some people think that the government in Washington is trying to do too many things that should be left to individuals and private businesses. Others disagree and think that the government should do even more to solve our country's problems. Still others have opinions in between. How do you feel about this?
(From the General Social Surveys, 1972–1983.)

More examples may be found in the "Social Attitudes" section of the Parish Profile Inventory (General Appendix). Questions on social and political attitudes are not as common in congregational studies as the other types discussed here. This may be the case because the average person may have difficulty in seeing how they relate to local church concerns. At the same time, these are questions at the very heart of a congregation's identity.

Opinions about congregational life. This area of research explores process issues as well as matters relating to congregational identity. One subgroup of questions deals with leadership, another with goals.

Questions on leadership probe the thinking of members on expectations of the pastor, preferences regarding leadership style, views on access to leaders and whether leadership is seen as representative of the membership. A more detailed discussion is contained in the sections on "Tasks of the Pastor" and "Style of Ministry" in the Parish Profile Inventory (General Appendix). Styles of ministry and leadership issues in the church are the focus of Donald Smith in his book, *Congregations Alive*[9], a summary of the author's study of Presbyterian congregations. Smith's questionnaire (see Appendix 5–2) is an example of a finely focused examination of program concerns.

Opinions on goals cover the members' familiarity with stated purposes, perceptions about the appropriateness of the goals, agreement or disagreement with them, personal objectives and the relation of those to congregational goals. Robert Worley provides an example of a series of questions centered around goals in his book, *A Gathering of Strangers.*[10]

This instrument is designed to help you indicate your perceptions about the goals of a congregation. There are no right or wrong answers. Check the appropriate space that best expresses your perception about the goals.

1. The goals of this congregation are clear to me.
   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

2. The goals of this congregation are not clear.
   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

3. Someone else has established the goals of this congregation.
   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

4. My personal goals are consistent with the goals of this congregation.
   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

5. I have been involved in establishing the goals of this congregation.

   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

6. The goals of the congregation are unexamined.

   Agree __ __ __ __ __ __ __ Disagree
         1 2 3 4 5 6 7

Goals are intrinsically related to the manner in which congregations arrive at decisions about program, especially levels of support and degrees of "ownership" among the members.

A number of items in the appendix to this chapter and in the General Appendix can help study groups explore feelings about goals. Others appear in *Congregations Alive* and in the *Smaller Church Study Guide*.[11]

Questions about specific programs or ministries gauge perceived relevance to the needs of members and non-members and degrees of satisfaction with programs provided. Highly relevant in a congregational study is the fact that members may be both *users* and *purveyors* of certain programs; in other cases they may be only users. When persons surveyed are primarily users, needs-assessment instruments may focus on the perceived effectiveness among members, that is, whether the level of service being offered is sufficient to the need. Questions along these lines often stray into the area of evaluation research, but, as we have already seen, these processes are not neatly separated. Interestingly, relatively few questions in church self-study guides focus on church members as providers of ministries. The questionnaire (Appendix 5–2) used in the book, *Congregations Alive*, is a notable exception. It contains a far more focused examination of one area of experience and opinion about leadership—as shared ministry—than is typical of needs-assessment materials.

Information about the characteristics of members and persons in the larger community enables church planners to better comprehend the context into which a program or service would be introduced and to measure likelihood of its acceptance or use. The types and extent of information about potential users needed by planners depends on the scope of the program decision to be made. If the congregation is contemplating extensive program development or redevelopment, a broader range of information is required than if the purpose is to evaluate a particular program or program area.

The types of information discussed so far in this chapter, especially membership characteristics, are often used by program planners to *infer* needs. The availability of program resources, notably people

resources, can also be estimated from such data. For example, a combination of data on age, occupation, and family organizational patterns would allow planners to estimate the potential need for child day care services, or adult recreational and support groups, and to project the availability of volunteers for these programs.

Most church planners would not want to proceed with the actual development of programs or services without further verification of the need for and interest in them among potential users. More direct measures would be employed in determining realistic expectations for uses, attendance, or participation.

In order to get the most reliable assessment of interest and potential use, specific details about the program under consideration should be provided to the respondents. When will the program be offered—time of week and time of day? Will there be associated costs? Will transportation be available for persons who could not otherwise participate? Any relevant information that planners can offer will increase the reliability of responses and help to establish the extent to which a program will be used.

When program planners are not at the point of focusing on the audience for a specific program, questions must be relatively open-ended. Lacking program specifics, an unstructured approach gives respondents the opportunity to describe their needs and interests without limiting responses to predetermined alternatives. Ideally, the data collection approach at this stage would encourage respondents to think about two basic kinds of needs: (1) those that might be addressed by the congregation (the need to be ministered unto) and (2) those that they would like to address through participation in the congregation (the need to minister to others).

5.3.3.3 *Facilities*

Facilities are an important contextual factor in the congregation's program and should be considered in a program study. Typically, buildings and other facilities are not thought of as program resources. Most often maintenance costs and other expenditures associated with property are seen as competing with the program budget.

Systematic observation of the congregation's use of facilities and of the conditions of facilities should be part of the church's needs assessment. This part of the study might begin with these questions:

+ How appropriate are the facilities to current program emphases?
+ Are there problems of access for any age group or for persons with special limiting conditions?

+ Does the space available represent an untapped, potential program resource?
+ Is the space a program liability?
+ If the congregation lacks financial or human resources to carry out a needed and desired program, do existing facilities represent an asset in the achieving of this goal?

A recent study of congregational child day-care centers conducted by the National Council of Churches concluded that the property holdings and historical construction patterns of many parish churches make them well equipped to provide such services.[12] Furthermore, the location of many churches in their communities, and, even their tax-exempt status, recommend them for child day-care programs. It is not always requisite that a congregation fully fund or staff a program that might fit both within its theological understanding of ministry and be responsive to the needs of the surrounding community.

The research team will overlook an important feature of the program context if it fails to consider the potential use of the existing facilities. At the same time, the availability of facilities that might be suited for a particular type of program must be weighed against other factors and the ministry goals of the congregation. The scheduling of space must be carefully considered. A congregation that has a single auditorium with basketball facilities could not give *carte blanche* use to a community team whose practice hours may conflict with the established hours of the Girl Scout troop or the weekly meeting of the "golden age club."

5.3.4 Relating Program Decisions to Identity, Context, and Process

What are the next steps for the study team once the data collection is completed? An underlying assumption in some needs-assessment literature seems to be that the gathering of information will automatically lead to decisions and program change. That is no more true for churches than it is for individuals. As persons, we may be informed that we are overweight, or that our blood pressure is dangerously high, or that we smoke too many cigarettes. Knowing this does not automatically lead us to change eating habits, introduce exercise, or stop smoking. Purposeful change requires intentional efforts and a desire to do it. The information gathering stage of the needs assessment process is only a means to an end.

Change, in fact, is only one possible outcome of a needs assessment. Another is affirmation of the existing program as the most viable course toward the congregation's goals. And if the need for change is

indicated by study findings, any implementation will depend on the desire of leadership and membership to follow through, given available resources.

The decision-making phase of the needs-assessment process comes when the study team decides what the information means, when it *interprets* the findings in light of the congregation's context, identity, and processes. If the study reveals needs that are not being met through existing programs and there is a will for change, the next step is that of *assigning values* to the needs that have been identified. This involves grappling with such questions as:

+ Can the newly identified needs be addressed within this congregation's understanding of its faithfulness to the gospel, other contextual factors and present or potential resources?
+ Considering all of the needs identified, which seem to be most critical?
+ Which should be taken up first; what ideas can be deferred?

Answering such questions begins the process of determining priorities, that is, rating the needs that have emerged. Few congregations are ever able to address all needs discovered in a program study, and often doing more of one thing means doing less of another. Income and expenditures figure heavily in program decisions. Newly identified needs and resulting program costs must be compared with those of beneficial existing programs. An exercise from the *Smaller Church Mission Guide* (see Appendix 5–3) may be helpful to some congregations in illustrating how the prioritizing of a list of new activities also entails decisions on whether the church can do more or less in existing programs. Another option, of course, is to find new sources of income and personnel for new or expanded programs.

In considering expressed needs for basic human services, such as food pantries or clothing ministries for street people, relevant inquiry goes beyond asking how the specific congregation can meet the need. Thinking can be broad:

+ Is providing the service directly the best form of stewardship and ministry? Would an advocacy program be more effective?
+ Should the congregation attempt the program alone or in cooperation with another church or coalition of churches?
+ Should the program be physically lodged in the church or should the congregation's resources be used to fund the effort at another site?

+ If facilities are the major resource of the church, how does it obtain the dollars and the people required by the program?

+ Is it necessary to start something entirely new? Could an existing program be expanded or modified to fit the need?

+ How do existing programs interrelate in terms of needs that have been identified? Can a third program be created out of two existing ones with little or no increased cost? (An example of this might be day-care programs operated in conjunction with activities for senior citizens. The ministry goal of each might combine to accomplish a third, say the fostering of intergenerational relations and learning experiences.)

Study teams should be aware that strong proposals for new programs may be interpreted within the congregation as challenges to activities that appear to be structurally requisite and, therefore, may encounter resistance even if the idea is generally favored. Many church programs become entrenched over time for a variety of reasons having to do with theological tradition, local history, and denominational factors. Such programs can develop lives of their own, sometimes in isolation from changes taking place in other areas of church life. If this is the case, the issue for the study team may not be whether the congregation is going to continue these programs but, rather, how they can be done better, or somewhat differently in order to respond to more needs. How can they be made more responsible to the current membership? Can the congregation fulfill the specific needs of its people though activities that were originally begun to carry out an organizational goal? The study team will want to ask several questions about these institutionalized activities in attempting to translate the findings of the needs assessment into programs:

+ Are changes needed in the times of day or the seasons when certain programs are undertaken? How does scheduling relate to the characteristics of members' work and family obligations?

+ Who is involved? Have members expressed a desire to be more involved in the planning of whatever the program is? Do they want more or less direction from the clergy and elected lay leadership?

+ How relevant is the content to a majority of the users or potential users?

+ Should age group activities be expanded to include others? Or, are more age-graded activities needed? Would it be helpful to increase the diversity of participants, or is there need for more careful division along the lines of special interest?

+ Are the facilities appropriate for the current form? Do they fit the size of the group for which the program is intended? Does the space pose problems for any particular age group or for disabled persons?

The needs-assessment approach outlined in this chapter tends to be *person-oriented* rather than *content-oriented*. This is deliberate in order to demonstrate that, in most cases, the same types of needs articulated in different contexts can be addressed in a variety of ways. Many different programs can fulfill an expressed need, and the program that is ultimately adopted should be tailored to the context in which it will be conducted.

The final stage of needs assessment is the translation of needs into programs. It is not in the scope of this handbook to elaborate on how that is done. However, the topic of the concluding section of the chapter discusses, among other things, means by which the congregation can study the early stages of program implementation. Evaluation research can assist in developing and maintaining relevant, effective congregational programs.

5.4 Program Evaluation: Research Strategies

5.4.1 Definition, Purpose, and Scope

Informal evaluation goes on all the time in the congregation. Church members in casual conversation evaluate the pastor's sermons, the choir's anthems and the food at the Sunday school picnic. Such informal evaluations entail a process of judging the merits of persons, activities and things. Formal definitions of evaluation also use the language of value and worth. Formal evaluation appraises, judges effectiveness, and, commonly, seeks to determine the extent to which goals have been achieved. Whether formal or informal, evaluation involves subjective judgments.

Evaluation research, however, is the process of collecting the information upon which evaluative judgments can be based. It is characterized by: (1) intentional, planned data collection, (2) systematic, uniform instruments and processes for that collection, and (3) the use of objective criteria in measuring effectiveness, efficiency, or excellence.

Types of evaluation approaches. As noted earlier, evaluation research employs the standard social science methodologies for data collection. The type of methodology used is determined by the evaluation context, the

questions to be answered and the audience or reference group for the research.

Ernest House identifies four major models in his taxonomy of evaluation approaches[13]:

+ Systems
+ Behavioral objectives
+ Decision making
+ Goal free

The first two models are goal-oriented and raise such questions as: Were the expected effects (goals) achieved? Can they be achieved more economically? What are the most efficient methods of achieving certain outcomes? Is the program producing?

Evaluation contexts in which these questions are typically asked include business, industry, government, and, in some cases, education. Those contexts are assumed to be characterized by programs with pre-specified goals and objectives with quantifiable outcomes. The audiences or reference groups for the evaluative data are managers, economists, psychologists and educators. Measurements of effectiveness may include the use of standardized tests to compare achievements to national averages or cost-benefit analyses.

As contexts for evaluation, congregations are usually quite different from government or educational institutions. Goals, if stated, are usually general, and their attainment difficult to measure because church goals rarely lend themselves to quantification. The audience or reference groups for evaluative data may be decision makers—congregational leadership—but members of that audience may be as concerned about intangible human outcomes, such as faith development, as about cost efficiency.

The decision-making and goal-free evaluation approaches cited by House are better suited to the congregational context. The goal-free model, for example, is concerned for *all* effects of a program, not only with those set forth in a statement of goals.

All of House's evaluation models utilize standard social science methodologies. The questions asked determine what method is selected. Quantitative measures and experimental design would be more common in a systems or behavioral-objectives context. Surveys and questionnaires are more frequently used in decision-making and goal-free evaluation, but interviews and unobtrusive measures are also likely to be regarded as essential components to data collection when evaluators are interested in how persons feel about programs.

A variety of questions are pertinent in a congregational program evaluation:

+ How effective is the program in achieving what it set out to do?
+ Should it be continued as is?
+ Is it possible to improve it?
+ How has the program context changed, if at all?
+ How should funds be allocated among several competing programs?
+ Is the underlying purpose or method of the program acceptable to the program planners and participants?
+ Are the relational aspects of the program in keeping with the congregation's values?
+ How does the program affect how participants feel about themselves?
+ How do participants feel about the program?
+ What needs does this program address?

Formative and summative evaluation. A major distinction is made in evaluation literature between formative and summative evaluation. Formative is conducted for the purpose of improving ongoing programs; summative is done for the purpose of making basic decisions about whether a program should be continued or discontinued.[14]

Situations in which a congregation must decide whether to continue or terminate a program are far less common than those in which the concern is to improve an existing program. Yet the summative study process is the one that most often comes to mind when persons think of evaluation research.

Increased understanding of the benefits of formative evaluation is needed in the church study process. Knowledge of a variety of methods that can be used for formative evaluation should lead congregations to see the value of year-round evaluation that both affirms and builds upon that which already exists. An example of what is meant is in order.

A United Methodist congregation decided to start a meals program for what it perceived as a growing number of elderly persons in the congregation and the surrounding community. The decision was made to provide dinner, the evening meal, since it was assumed that those volunteers preparing the food would be working or caring for children during earlier hours.

The congregation's needs assessment indicated that at least one hundred persons within walking distance of the church would benefit from the program. Most of those elderly persons lived alone, had low incomes, and were unable to prepare nutritional meals for themselves. Many were also without any means of transportation for grocery shopping. The meals program seemed to its planners to be an excellent service project for the congregation. Yet during the first few weeks of the program's operation, the number of

persons coming for dinner was only about one-third of that projected on the basis of information from the census and a survey.

The program developers were frustrated by the low response until they interviewed several participants. They discovered a flaw in the program design. Many of the elderly persons who would have liked to come for a free meal were afraid to go out after a certain time of the day because they did not want to walk home after dark. The dinner hour was the problem. With this new information, the program was modified to offer the meal at lunch. But along with this change went the need for an alternative source of volunteers. Planners found a partial answer in retired persons who were not only willing to help with meal preparation and serving but could also provide transportation to elderly participants of limited mobility.

This example of a formative evaluation shows how information obtained early in a program's life-cycle can be used to enhance its effectiveness and ultimately determine its success. If the program organizers at the church had not collected additional information in trying to figure out why the meals program was underused, they probably would have made an inaccurate judgment; namely, that there was not a sufficiently large elderly population in need of the service to warrant its continuation.

Relationship of evaluation and needs-assessment studies. It should be apparent that considerable overlap occurs between needs-assessment and evaluation processes. Both tell the congregation something about the quality, accessibility, or suitability of existing programs. An important distinction between the two is the *focus of the data-collection process.* In needs assessment, the focus is on persons, whereas in evaluation it centers on specific programs. Needs assessment uses the information gathered about the needs of persons and available resources to inform decisions. Evaluation uses the information gathered about programs, projects, or activities to inform decisions. Both are geared toward decision making, which is not the case with certain other types of research which use the same data-collection methodologies. (This should signal a caution to church study groups that may use an outside specialist in setting up an evaluation process. The questions asked should be those of the persons who will be making the decisions, not those of a person who may want to formulate them in keeping with independent research interests.)

The findings of both needs assessment and evaluation are for use in decision making. Both have potential as agents of change in the congregation and neither should be initiated for its own sake. Each is time-consuming and usually not proposed unless there is

some idea that change is in order or could help a church better achieve its goals. As with the old adage, "If it ain't broke, don't fix it," so with needs assessment and program evaluation: "If you don't intend to change it, don't ask people what they think of it." The result of asking questions, of studying a program, may be to affirm it but that is not an outcome that can be assumed in advance.

5.4.2 Process Issues in Evaluation in Congregational Contexts

The primary issue to keep in mind is that the research strategies used must relate to the different motivations for participation among church members. It is not really important in business or government whether the people who are required to do planning and evaluation want to do it; the goals of the organization—from the perspective of those responsible for production—are not necessarily related to the personal goals of the staff. The overriding reality is the "system" to which the personnel are accountable.

The church is a voluntary organization and the continued existence of any voluntary group depends in part on the rewards gained from participation.[15] In a congregation, those rewards include faith fulfillment, pleasure in performance, sociability, ideological symbolism, and accomplishment of tasks. That the structure of rewards continues must be of concern to the leadership and to the congregation as a whole. The factors of voluntarism and rewards make evaluation research in a congregation different from that in many organizations that engage in program study.

Evaluators of congregational program must recognize the investment and commitment of persons involved and share the genuine desire of most such persons to assure that the programs are effective. The people of the congregation, particularly the leadership and those who designed and operate current programs, should have a sense of ownership of the evaluation process. Relational factors are highly significant and evaluation approaches predicated on hierarchial models may have to be modified before they can be used in a congregation.

The relational aspects of church programs should be kept in mind at every stage in the evaluation including initial assessment of goals. Church program goals, when these have been articulated, may not state that a particular activity was intended to build shared leadership or to increase dialogue between certain groups within the membership. Evaluation processes that are heavily goal-oriented may overlook these unstated but essential relational qualities of programs and their outcomes. Evaluators need to discover how

people have felt about the program. Perhaps a program that seems to be lacking in terms of quantity or quality really was successful in other ways. Or perhaps some program that looked wonderful on paper actually failed in relational aspects. For example, a service project dependent on volunteers accomplished its task but set a negative precedent for such future efforts; the persons supervising the effort were so critical of volunteers who failed to follow instructions perfectly that the participants had no joy in the activity. In a congregation, the goals of individuals are important and should be taken into account in program evaluations. Personal satisfaction cannot be overstressed as motivation in voluntary organizations.

5.4.3 Getting Started

5.4.3.1 Who Should Be Involved?

Getting started with an evaluation entails many of the same early steps involved in a needs assessment. Initially, persons who will provide leadership for the evaluation must be identified and recruited. In some cases, the pastor and the governing unit of the congregation might comprise the evaluation team, with or without an outside consultant. In other cases, a task force made up of key leaders and program personnel (staff or volunteer) might be designated. Pivotal leaders and program staff should automatically be included in the evaluation process. If, for example, the evaluation is to focus on the Christian education program of the congregation, some members of the study team should be familiar with the literature of this content area, the local organization, the efforts of other churches or denominations and issues currently under debate in the discipline of Christian education. The team needs to be able not only to look at the existing program but to be able to take account of alternatives.

The team will want to determine the degree of emphasis it wants to place on measurements of the effectiveness or success coming from outside the particular congregational context. Depending on that degree, several approaches can be used to receive input from beyond the program context and to expand the horizons of the program planners. "Blue ribbon panels" or "accreditation" approaches feature outside experts who are invited in to examine the program and make judgments based on agreed upon standards considered appropriate for the program under study.[16] Some congregations may even contain such experts or they may be in neighboring congregations, on regional denominational staffs, or in nearby seminaries or colleges. Quantitative and qualitative data may be collected by these persons in the course of their examination, but this is not usual.

The advantages of using such experts are threefold: (1) the congregation gets a fresher look at program than may be possible from persons who have vested interests as participants, (2) information on how others provide program may suggest new approaches, and (3) negative criticism is sometimes more palatable from outsiders, if they are perceived as genuinely objective.

Recourse to outside experts also has potentially negative implications. Patton notes that the approach is essentially deductive, applying criteria from outside the program context to determine whether it meets certain standards. In many cases, the experts do not report data but make judgments, a stage of the evaluation process more appropriately done by the congregation's leadership; listening to the opinions of experts may short-circuit a thorough research effort. Patton also observes:

> The connoisseur [expert critic] has no commitment to produce a descriptive, holistic analysis that brings the decision maker into the program experience so that informed judgments can be made by those decision makers; the connoisseur's criticism and metaphors are both the data and the judgment.[17]

Use of a "friendly critic" may be a more appropriate technique. Knowing the program context is important, as is knowing general standards.

Another evaluation method, called the "adversary approach," transforms members of the study team into outside experts. This approach sets up two groups to discover and present data exclusively on negative aspects and positive outcomes of a program. Each group is expected rigorously to defend its conclusions on effectiveness or ineffectiveness with data gathered from observation. The danger of this method is that it precludes a unified (holistic) approach to data collection. It may also pose ethical problems for persons involved since it sets up the possibility of the manipulation of data to support negative or positive conclusions.[18]

"The adversary approach" is probably most appropriate in testing new program *ideas* within the congregation. Persons from the target audience of a proposed program might be asked to list anonymously positive and negative arguments they can imagine. The rationales could then be debated.

5.4.3.2 The Issue of Goals

A lack of stated program goals often hampers evaluation efforts in a congregation. When that is discovered, one typical response is to embark on a goals-writing binge, the leadership listing all the programs and preparing objective statements for each.

This dubious exercise often results in the translation of existing programs into standard planning and budget language, even if that is not the way in which the congregation does its planning and budgeting. This turns a process into an end in itself rather than a means to an end, and it will frustrate people.

Goals and objectives in a congregational context are vehicles for helping people think about what they want to accomplish with a program and what steps they need to take. The language of *measurement criteria* used in goals statements is there to indicate how the evaluators would know whether a program is a success in its own terms. If First Church is committed to liturgical dance and starts a program to increase its use in regular services of worship, planners should attempt to be specific about what they mean by the word "increase." From one to six times per year? From one to ten times? Every other Sunday? Clarity at the outset makes later evaluation much easier. But program goals and related statements need not be quantitative if the activity does not lend itself to such language. No objective standards are available for the measuring of goals such as "the deepening of faith" or "making members more aware of their neighbors on a day-to-day basis." The tools in evaluation research must be appropriate to the context and topic.

Not infrequently, a congregation finds itself wanting, or needing, to evaluate a program for which no written goals exist. How does it proceed? One approach is a process of *goals clarification* that may involve the research team or a broader spectrum of the members. This process could begin with an examination of current expectations of the program as well as the intentions of the original designers, insofar as the history can be reconstructed. Interviews with the original planners might uncover the roots. A questionnaire can be used to determine the current expectations and views on how the program should function. This research would allow the evaluation team to write a simple set of *assumed goals* and, perhaps, specific statements on how components of the program should be operated.

The phase of evaluation research that looks at goals should not be overly complicated or time consuming. Initial exercises, such as determining assumed goals, are for the purpose of providing rudimentary standards with which to compare current program characteristics and outcomes—all means to ends. The objective is to evaluate the program, not to write a goals statement. If no consensus about the intended purpose exists at the end of a goals clarification process, the various perspectives expressed should be recorded as plausible goals to be tested in the course of the ensuing evaluation. After all, it is possible for a program to fulfill several, sometimes disparate, goals of both developers and users.

Programs often stray or are guided away from their original courses. Program plans are modified by a host of contextual factors. Real goals are not always the official goals, and a failure to observe that fact can frustrate evaluation research and cause it to be disregarded. Evaluation is most likely to affect decisions in the congregation when it accepts the values, assumptions, and objectives of the leadership and the members who make program decisions.

Goal-free evaluation liberates the evaluators from the problem of constructing or reconstructing goal and objective statements. The distinctiveness of this approach influences both the data collection and interpretation components of the research. It proceeds from the assumption that program has many *unintended* outcomes, some of which may be negative but many of which may be more valued by the group than those originally intended. A goal-free approach avoids the incorporation into data-collection instruments of a bias favoring only outcomes projected in a statement of program purpose. It permits questions that provide information on all effects of the program. House uses the example of a goal-free approach in a consumer survey asking people how they used a particular product and how they viewed its utility. The manufacturer's intended use would not be particularly pertinent.[19]

An example will suggest the relevance of goal-free evaluation to congregational program. Take an annual stewardship drive. As part of its program, the local stewardship committee organized teams to visit the home of every member, to talk about pledging and explain the church program. A deliberate part of the plan was to match callers with certain characteristics of the persons they were to visit: women called on women, senior adults on other seniors, youths on youths.

Subsequent evaluation of the program focused almost exclusively on the increase of pledges and on the average amount of the contribution. The report showed only a three-percent increase in giving, and the stewardship committee was discouraged. Planners felt that the amount of effort that went into the visitation program did not justify the results and decided to drop the plan for the next year. The committee did not notice the unintended positive outcomes because it was only looking at money results.

The committee failed to observe that attendance at Sunday worship increased after the campaign and remained at a higher level than at any time in the previous five years. The fact was that many members who had felt ignored by the church's leadership came

back when visited, and some got involved in other activities in addition to worship. The image of the congregation as a "cold" place was changed for some. These outcomes of the visitation program were highly visible and valued within the congregation but not by the stewardship committee which had a single standard for measuring success.

5.4.4 Data Collection

The evaluation team must decide what types of data collection techniques will be used and, if surveys are to be conducted, who will be interviewed or asked to complete a questionnaire. Unlike the ideal in a needs assessment, everyone in the congregation is not approached in the course of program evaluation unless the program, such as worship, is one in which all members are potential participants. (Even then, equal weight would not be given to the opinions of persons who attend worship on only Christmas and Easter, unless the concern is to find out why certain persons are present so rarely.) Program evaluation looks primarily to the views of a fair representation of users and leadership.

A list of program participants may be available. If not, research options are available short of a mailing to all members. Select a typical day to distribute questionnaires—when the program is operating and normal attendance is expected, or set up interviews. Respondents should be assured of anonymity and encouraged to be honest in their comments or responses. Be mindful that church programs are closely identified with personalities and members may be reluctant to say anything critical.

If a questionnaire is used, a minimal number of questions about the respondent's background should be included in order to identify characteristics of the program users. This will, among other things, help the congregation to know whether the program is serving the persons for whom it was designed. Helpful background information might include:

+ age
+ sex
+ economic status, if relevant to program
+ race/ethnicity
+ length of residence in the community
+ member or nonmember of congregation
+ other programs in which persons participate

The amount of background information requested would vary with the focus of the evaluation.

The central concern in program evaluation is a respondent's opinion based on experience. The surve might ask about:

+ frequency or length of time in the program
+ participation by other family members/friends
+ reasons for participation
+ expectation for and from the program
+ actual experience in the program

The last question opens to investigation a range o program components, such as schedule, facilities leadership and quality of service. A sample of a variet of questions that might be asked of participants i included in the evaluation guide for workshops conferences, or seminars in Appendix 5–4.

The nature of the responses will depend on the nature of the program. For example, if a meals program is being evaluated, *quantity* may be a major issue: i sufficient food served? If the program is educationa reactions to the material will be significant: are there too few resources provided? Too many? Are they appealing? Does the program leadership feel the resources provided by the church are adequate? Readily available? Is it bothersome to share a slide projector with another program?

Quality of service may be relevant. It can be expected that responses on quality will vary considerably since this is an area of acute subjectivity. The evaluation team may find it necessary to define its concept of quality in regard to the specific program.

The team may have concerns about the *organizational* characteristics of the program: the decision making involved in developing and conducting the activity on an everyday basis, communication, working relations among leaders, resource usage, and costs. Information on some of these components can be obtained only by examination of secondary sources—reports, budgets, attendance records. Comparison of budgets with actual expenditures will help the team when it discusses priorities, or the lack thereof, and might reveal a need for more consensus on what the congregation ought to be doing.

Issues of *performance* are even more difficult to quantify or evaluate than are organizational components. Users and leaders should be asked about *the way* a service is provided or a program conducted rather than *what* was provided or done. In the church, the "why" is frequently more important than the "what." Questions about why deal with style, faithfulness to the congregation's understanding of the gospel, and sensitivity to identity issues.

Some program aspects allow a fairly limited range of responses; some anticipate complex, nuanced expressions. Matters such as scheduling, resources, frequen-

cies, and quantities, perhaps even quality, can be explored by using a *closed-ended* question:

Was the amount of time scheduled for orientation to the program:

1__too much?   2__about right?   3__too little?

If this event were held against next year, what would be the best month for you?

__January	__May	__September
__February	__June	__October
__March	__July	__November
__April	__August	__December

Questions can also be phrased to provide opportunity for deviation from anticipated responses without using an entirely open-ended approach. For example:

How did you learn about this program?

__from a friend who is a member of the congregation
__from a newspaper advertisement
__from a flyer distributed door-to-door
__from a sign on the church lawn
__from some other source _____
(please specify)

What portion of the program did you find most useful?

__small group discussion
__workshop experience
__special presentation by guest speaker
__opportunities to exchange information during coffee break
__other _____
(please specify) .

Open-ended questions are quite common in evaluation and are used when the researcher does not know or is not sure what responses are possible. They are especially appropriate for use in formative evaluation efforts where unobtrusive measures such as observation are best for getting a feeling for how a program is working. Open-ended questions were necessary when members of the United Methodist congregation, noted above, were trying to find out why the meals program was less popular than had been projected:

+ What would you suggest could be done to improve this program?
+ What are ways in which you have personally benefited from this program?
+ Do you have any suggestions about how the

program could be organized to provide for more involvement of participants in the leadership?

Close-ended and open-ended questions are sometimes used in conjunction:

a. How would you describe the facilities chosen for the retreat?

1 __ more than adequate 3 __ somewhat inadequate
2 __ adequate   4 __ totally inadequate

b. If you found the facilities *inadequate* in some respect, please tell us why this was the case.

An evaluation instrument may also include a question that measures a respondent's overall reaction to a program:

Overall, how would you evaluate the effectiveness of this program?

1__ very effective   3__ ineffective
2 __ effective   4__very ineffective

Or,

How would you describe your feelings about the curriculum approach used in the class?

1__ very satisfied   3__ dissatisfied
2__ satisfied   4__very dissatisfied

Respondents may have many minor criticisms of individual components of a program and still feel that overall it was rewarding. If some overall measure is not used, the evaluators may not be able to tell whether the criticism of components should be read as commentary on the whole and whether they cumulatively add up to a negative evaluation.

Finally, a good survey instrument should most often conclude with an opportunity for persons to express feelings about issues on which no questions were provided. This gives people a chance to say what it means to them to be involved in a program and, perhaps, to give clues to unintended outcomes.

5.4.5 Interpretation

The interpretation phase is the most difficult in any evaluation process. As with needs assessment, the information gathered in an evaluation, even when the data collection is extensive, does not answer the question of *what to do*. The data may show that a program is not working as intended; it will seldom indicate a clear direction for solving the problem.

Interpretation of the data requires value judgments on the part of the study team. Evaluators must own and take responsibility for making the judgments or seeing that they are made within the congregational structure. This is a hard point to drive home: decisions are made by people, not data. There may be no right or wrong conclusion; a conclusion about effectiveness or success reached in one context may not be appropriate in another. To make a decision, the study team must go back to the purpose of the program, to the means set forth for doing it, and ask whether it has been done—to what degree given the time, place, and resources.

If answers are negative, the team will want to examine the possibility that something was done which may be valuable, although that was not what was intended. Should that be the case, the study team may still need to consider how the congregation can do that which it started out to accomplish and also affirm what it did without deliberate intention. If a congregation cannot do both, decisions must be made on which is more valuable.

The study team should also examine the fit between characteristics of participants and what the program provides or does. Are adjustments needed? Have people changed over the years while the program remained the same? Where are the people for whom the program was originally designed?

Program evaluation as discussed in this chapter points out strengths and weaknesses, but where weaknesses show up it offers the barest hints for solutions.[20] Carol Weiss has observed:

There is a gap between data and action that will have to be filled in with intuition, experience, gleanings from the research literature, assumptions based on theory, ideology, and a certain amount of plain guessing. Moving through this gap to new program experimentation requires a commitment by decision makers to the belief that a new trail is better than continuation of a proven error.[21]

The purpose of this chapter has been to suggest methods and tools to help a congregational study team to make decisions about choices that work for its church, and to allow persons a fuller expression of ministry. The content of those decisions—the actual program—cannot be considered outside the living context of the congregation itself. The content of the decisions remains, appropriately, in the hands of the congregation itself.

NOTES

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3. Ibid., pp. 95-98.
4. *Needs Assessment: An Exploratory Critique.* Office of the Assistant Secretary for Planning and Evaluation (HEW), Washington, D.C., U.S. Department of Commerce, 1977, p. 21.
5. Ibid., p. 29.
6. Ibid., p. 22.
7. Princeton Religion Research Center, *The Unchurched American* (Princeton, N.J., 1978).
8. Ibid.
9. Donald P. Smith, *Congregations Alive* (Philadelphia: The Westminster Press, 1981).
10. From *A Gathering of Strangers: Understanding the Life of Your Church* (Revised and Updated Edition), by Robert C. Worley, p. 44. Copyright © 1976 The Westminster Press; © 1983 Robert C. Worley. Reprinted and used by permission.

11. Henry A. Blunk, *Smaller Church Mission Study Guide* (Philadelphia: The Geneva Press, 1978).
12. Eileen Lindner, Mary Mattis, and June Rogers, *When Churches Mind the Children: A Study of Day Care in Local Parishes.* (Ypsilanti, Mich.: The High/Scope Press, 1983).
13. Ernest R. House, *Evaluating with Validity.* (Beverly Hills, Cal.: Sage, 1980), p. 23.
14. Patton, *Qualitative Evaluation Methods*, p. 71.
15. Aida K. Tomeh, "Formal Voluntary Organizations: Participation, Correlates, and Interrelationships," in *New Perspectives on the American Community.* Roland L. Warren, ed. (Chicago, Ill.: Rand McNally, 1977).
16. Patton, *Qualitative Evaluation Methods*, pp. 50-53.
17. Ibid., p. 52.
18. Ibid., p. 53.
19. House, pp. 30-31.
20. Carol H. Weiss, *Evaluation Research: Methods of Assessing Program Effectiveness* (Englewood Cliffs, N.J.: Prentice-Hall, 1972).
21. Ibid., p. 125.

For Further Reading on Program

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APPENDIX 5–1
*Lutheran Church in America**
Nurture Study

<u>CONGREGATIONAL QUESTIONNAIRE</u>

_____
Your Congregation's Name and Location

By answering the questions on this form, you will help us gain a better understanding of your congregation and you as an individual member. Would you please check here to indicate that you have read the enclosed explanation of the LCA's use of this questionnaire? _____

I.   First, a series of questions about you and your religious background. Read each question carefully, then CIRCLE the number of the answer which is best for you. For example:

   Is your church located within one mile of your residence?   1. Yes   2. No

1. a. On the average, how often do you attend Sunday worship services?
   1. Every Week   3. About 3 times a month   5. About once a month   7. Once or twice a year
   2. Nearly every week   4. About twice a month   6. About every 6 weeks   8. Less than once a year

   b. If you are married, how often does your spouse attend?   1   2   3   4   5   6   7   8 (as defined in 1 a

2. In addition to Sunday morning services, approximately how many hours per month do you spend in church activities?
   1. 1 hour or less   3. 5- 7 hours   5. 11-13 hours   7. 17-19 hours   9. None
   2. 2-4 hours   4. 8-10 hours   6. 14-16 hours   8. 20 hours or more

3. Do you presently hold or have you held an elected position in your congregation in the past three years?
   1. Yes   2. No

4. Are you presently serving or in the last three years have you served in any volunteer leadership position in your congregation (such as Sunday School teacher, woman's group, etc.)?
   1. Yes   2. No   If yes, how many?   1   2   3   4   5   6   7   8   9

5. Within the last three years, have you held an elected office in a voluntary association other than the church (e.g. a civic, professional, social, or community organization)?
   1. Yes   2. No   If yes, how many?   1   2   3   4   5   6   7   8   9

6. In how many different church organizations (such as choir, educational group, church committee) have you participated during this past year?   0   1   2   3   4   5   6   7   8   9

7. How long have you been a member of your congregation?   1. 1 year or less   2. 1 to 2 years
   3. 3 to 4 years   4. 5 to 7 years   6. More than 10 years, but less than all your life   7. All your life

8. What is the approximate distance from your home to church?
   1. 1 mile or less   2. 2 miles   3. 3 miles   4. 4 miles   5. 5 to 6 miles
   6. 7 to 9 miles   7. 10 to 12 miles 8. 13 miles or more

9. If you were not a member of this congregation all your life, indicate the denomination(s) of all prior congregations of which you have been a member. Circle as many as applicable.
   1. Lutheran Church in America (or its predecessors)   7. Methodist
   2. American Lutheran Church (or its predecessors)   8. Presbyterian
   3. Lutheran Church - Missouri Synod   9. Roman Catholic
   4. Other Lutheran church bodies   10. United Church of Christ (or its predecessors)
   5. Baptist   11. None
   6. Episcopalian   12. Other _____
                                                                      (Please Specify)

10. What is your present marital status? (Circle ONE please.)
   1. Single, never previously married
   2. Single, married previously   5. Married more than once, living with spouse
   3. Married once, living with spouse   6. Married more than once, separated from spouse
   4. Married once, separated from spouse   7. Widowed, not remarried
                                                   8. Divorced, not remarried

11. If married, is your spouse also a member of your congregation?

   1. Yes   2. No

12. Do you have children now living at home with you?

   0. No, none   2. 2 children   4. 4 children

   1. 1 child   3. 3 children   5. 5 or more children

13. Were your grandparents, or the grandparents of your spouse, members of your congregation or a former congregation that either merged into or sponsored your present congregation?   1. Yes   2. No

14. How many of your grandparents, and/or the grandparents of your spouse, were ever members of any Lutheran congregation?   0   1   2   3   4   5   6   7   8   9

15. In addition to those members of your household who live with you, how many other relatives are also members of your congregation?
0. None   1. 1 or 2   2. 3 or 4   3. 5 or 6   4. 7 or 8   5. 9 or 10   6. 11 or 12   7. More than 12

16. Of your closest friends, who live within 10 miles of your home, how many are also members of your congregation?
0   1   2   3   4   5   6   7   8   9

17. Of your closest friends, who live within 10 miles of your home, how many are not members of your congregation?
0   1   2   3   4   5   6   7   8   9

18. When you get together with acquaintances for social or recreational activities, how often are some other members of your congregation likely to be present?
1. Almost always   2. Frequently   3. About half the time   4. Occasionally   5. Almost never

19. How long have you lived in your present town or city?

1. 1 year or less   3. 3 to 4 years   5. 8 to 10 years   7. All your life

2. 1 to 2 years   4. 5 to 7 years   6. More than 10 years, but less than all your life

20. How many times have you moved to a different city or town since you were 18?

1. Once   3. Three times   5. Five times   7. Eight or nine times   9. Never
2. Twice   4. Four times   6. Six or seven times   8. Ten or more times

---

II.   Second, here are a number of statements offering an opinion about a congregation, or an individual's experience in that congregation. There are no right or wrong answers. You will probably disagree with some items and agree with others. First impressions are usually best in such matters. After reading each statement, decide if you agree or disagree and the strength of your opinion, and then circle the appropriate number or circle "N" if you have no opinion.

If you agree strongly, circle 1.
If you agree somewhat, circle 2.

Read each statement carefully. Then indicate the extent to which you agree or disagree by circling the number or letter following each statement. The meaning of the numbers and letter is indicated to the right.

If you both agree and disagree, circle 3.

If you disagree somewhat, circle 4
If you disagree strongly, circle 5

If you have no opinion, circle N.

IN OUR CONGREGATION:

	1	2	3	4	5	N
1. people are friendly to strangers and newcomers.	1	2	3	4	5	N
2. people help each other out in times of trouble.	1	2	3	4	5	N
3. the members have a voice in making the important decisions.	1	2	3	4	5	N
4. people do differ in their beliefs about Christianity.	1	2	3	4	5	N
5. people feel free to disagree openly with each other on matters of policy.	1	2	3	4	5	N
6. specific Lutheran doctrines play an important and prominent role.	1	2	3	4	5	N
7. people share God's love in what they do for and with each other.	1	2	3	4	5	N
8. there are cliques or exclusive groups which make one feel unwelcome.	1	2	3	4	5	N
9. people feel free to disagree openly with the pastor.	1	2	3	4	5	N
10. people are open to new experiences and ideas.	1	2	3	4	5	N
11. people care for one another in a way that is qualitatively better than what I have experienced in other groups.	1	2	3	4	5	N
12. the pastor dominates our congregational decisions.	1	2	3	4	5	N
13. people are relaxed and comfortable with each other.	1	2	3	4	5	N
14. people speak about experiences of the continuing action or presence of God.	1	2	3	4	5	N
15. people laugh and joke and have a good time, even when engaged in serious business matters.	1	2	3	4	5	N
16. to reach out to unchurched people is a high priority.	1	2	3	4	5	N
17. the people who have joined have done so primarily because it is Lutheran.	1	2	3	4	5	N

18. the pastor is available whenever members need him .   1   2   3   4   5   N

19. helping people in need who are <u>not</u> members of the congregation
    is a high priority.   1   2   3   4   5   N

20. our Christian beliefs and practices are typical of the majority
    of people in our community.   1   2   3   4   5   N

21. the educational program for children is a program of high priority. 1   2   3   4   N

22. members turn to each other for help as often as they turn to the
    pastor.   1   2   3   4   5   N

AS FAR AS MY EXPERIENCE IN MY CONGREGATION GOES:

23. I feel I have had some influence on the direction of congregational
    decisions.   1   2   3   4   5   N

24. I find myself accepted and included in the life of the congregation. 1   2   3   4   5   N

25. I feel I am well informed about the activities of the congregation. 1   2   3   4   5   N

26. I find my experience at church to be a source of personal strength
    for meeting the challenges of daily life.   1   2   3   4   5   N

27. if I had to leave my present congregation, I would want to find
    a new congregation like the present one.   1   2   3   4   5   N

28. I discover and express some of my deepest and truest feelings in
    church groups.   1   2   3   4   5   N

29. I am likely to sense God's presence mainly in fellowship with
    other Chrstians.   1   2   3   4   5   N

30. I am likely to sense God's presence mainly when I am alone.   1   2   3   4   5   N

31. if I had to leave my congregation, I think it would be easy
    to find another one like this one.   1   2   3   4   5   N

32. I find my experience at church to be out of touch with the
    realities of everyday life.   1   2   3   4   5   N

33. my experiences in church have helped me to accept myself,
    including my faults and shortcomings.   1   2   3   4   5   N

34. I think my congregation is special and unique.   1   2   3   4   5   N

IN TERMS OF MY PERSONAL SITUATION OR VIEWPOINT:

35. I believe my relationship to God has importance for my life
    after death.   1   2   3   4   5   N

36. I believe my relationship to God has importance for my life
    here on earth.   1   2   3   4   5   N

37. I imagine God to be mostly like a caring friend.   1   2   3   4   5   N

38. much of my daily life with my family or work is different
    because of my faith in God.   1   2   3   4   5   N

39. I would be disappointed if my children changed to a non-
    Lutheran denomination.   1   2   3   4   5   N

40. because of the pressures of the world, what I need from God
    is comfort and consolation.   1   2   3   4   5   N

41. experiences in church are the most important source for my
    sense of trust in God.   1   2   3   4   5   N

42. my experiences in church have helped me accept other people
    who are considerably different from myself.   1   2   3   4   5   N

III.   Thirdly, here are a number of statements which make a comparison. Each statement is followed by several
    items. From these suggested items, choose the three which you rate highest and number them 1, 2 and 3.
    Thus, mark 1 before your highest choice, 2 before your next highest, and 3 before your next highest.
    Also, choose the item for each statement that you rate lowest, and mark that 9. Note that in each case
    the lines before several choices will be left blank.

1. Of the many spheres of my life in which I gain personal satisfaction, the <u>three most important</u> are (1, 2 and 3).
   The <u>least important</u> is (9).

   _____ Group Recreational Activities   _____ Work*   _____ Friendships   _____ Family Life

   _____ Clubs or Community Organizations   _____ Hobbies   _____ Church   _____ Relatives

2. Of the many groups of people from whom I might seek help in times of personal trouble, the <u>three</u> <u>most</u> <u>likely</u> are (1, 2 and 3). The <u>least</u> <u>likely</u> is (9).

_____ Persons I know at work*   _____ Members of my church

_____ Persons I know through recreational activities   _____ A professional counselor

_____ Persons I know through community organizations   _____ Friends

_____ The pastor of my church   _____ Immediate family   _____ Relatives

3. Of all the people who know me, the <u>three</u> <u>groups</u> that know me <u>best</u> are (1, 2 and 3). The <u>group</u> that knows me <u>least</u> is (9).

_____ People I know at work*   _____ Members of my immediate family

_____ People I know through recreational activities   _____ Friends

_____ People I know through clubs or community organizations   _____ People at church

4. Of all the pastor's many responsibilities, the <u>three</u> <u>most</u> <u>important</u> are (1, 2 and 3). The <u>least</u> <u>important</u> is (9).

_____ Preaching   _____ Assisting laity in carrying out the work of the congregation

_____ Conducting public worship   _____ Administering the church office   _____ Teaching the young

_____ Pastoral care for members   _____ Serving the needs of the larger community   _____ Teaching adults

_____ Serving as a personal example of spiritual life for others.

5. Of all the activities of my congregation, the <u>three</u> <u>most</u> <u>important</u> for me are (1, 2 and 3). The <u>least</u> <u>important</u> is (9).

_____ Sunday morning worship   _____ Retreats or camping programs   _____ Projects to meet local social concerns

_____ Communion or Eucharist   _____ Church sponsored recreational activities

_____ Bible study   _____ Weekday prayer or worship services

_____ Fellowship occasions   _____ Small groups for sharing personal insights and concerns

6. When the different spheres of my life create conflicting demands on me, I most often tend to resolve such matters by assigning <u>highest</u> <u>priority</u> to (1, 2 and 3). I most often give <u>lowest</u> <u>priority</u> to (9).

_____ Clubs or community organizations   _____ Work*   _____ Church   _____ Relatives

_____ Solitary activities   _____ Recreation   _____ Friends   _____ Immediate family

7. For me the <u>three</u> <u>most</u> <u>important</u> characteristics of a good sermon are (1, 2 and 3). The <u>least</u> <u>important</u> characteristic is (9).

_____ That it is easy to understand and down to earth   _____ That it is a Christ-centered message

_____ That it is expressive of a strong form of religious authority   _____ That it is illustrated from the local community where I live

_____ That it has a pleasing style of delivery   _____ That it is biblically based

_____ That it is consistent with Lutheran doctrine   _____ That it is applicable to my life

8. If I had to move and look for a new congregation, the <u>three</u> <u>most</u> <u>important</u> considerations would be (1, 2 and 3). The <u>least</u> <u>important</u> consideration would be (9).

_____ The quality of pastoral care for members   _____ Other congregational programs (in addition to those listed)

_____ The preaching and teaching of Lutheran doctrine   _____ The fellowship of members with each other

_____ The style of pastoral leadership   _____ The location of the congregation in relation to my home

_____ The role of lay leadership in the congregation   _____ The number of members in the congregation

_____ The Sunday Church School program   _____ The youth program

9. Of all the considerations which contributred to my decision to join this congregation, the <u>three</u> <u>most</u> <u>important</u> were (1, 2 and 3). The <u>least</u> <u>important</u> was (9).

_____ The church location   _____ The preaching

_____ The friendliness of members   _____ A relative who was already a member

_____ A sense of Lutheran loyalty   _____ The youth program

_____ The style of worship   _____ Other church programs

_____ The quality of pastoral care   _____ The similarity of othr members to myself

_____ The personality of the pastor   _____ The style of leadership

*Any reference to work should include homemaking and for students the <u>work</u> associated with being a student

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IV.   Fourth, here are some additional questions about yourself. Remember all information is anonymous. Your answers to these questions will help us understand the makeup of your congregation. Please circle the number immediately in front of the appropriate answer.

1. What is your sex?   1. Male   2. Female

2. What is your age?

   1. 15 or younger   3. 19 - 24   5. 35 - 44   7. 55 - 64   9. 75 or older
   2. 16 - 18   4. 25 - 34   6. 45 - 54   8. 65 - 74

3. What is the highest level of schooling you have completed?

   1. Some grade school

   2. Finished grade school (8th grade)

   3. Some high school

   4. High school graduate

   5. Some college

   6. Trade school, business school, junior college degree or certificate

   7. College graduate (4 year degree)

   8. Some graduate school or professional school after college

   9. Completed graduate or professional school after college

4. How do you identify yourself in terms of racial or ethnic origins?

   1. No single racial or ethnic origins with which I identify

   2. Norwegian

   3. Finnish

   4. Swedish

   5. Danish

   6. German

   7. Black or Afro-American

   8. Hispanic

   9. Other _____

5. Are there a significant number of persons whose racial or ethnic origins are the same as yours and who are members of your congregation?

   1. Yes   2. No   3. Inapplicable because I answered 1 in Question #4

6. If yes, how important is the presence of persons of the same racial or ethnic origin for you?

   1. Very important

   2. Important

   3. Somewhat important

   4. Not important at all

   5. Not a relevant question since I answered 1 on Question #4

7. What is your total family income before taxes? Estimate as best you can.

   1. $ 4,999 or less   4. $15,000 - $19,000   7. $30,000 - $39,000
   2. $ 5,000 - $ 9,999   5. $20,000 - $24,000   8. $40,000 - $49,000
   3. $10,000 - $14,000   6. $25,000 - $29,000   9. $50,000 or more

8. How many other members of your household are also completing this questionnaire? CIRCLE the appropriate number.

   Spouse   0 1

   children   0 1 2 3 4 5 or more

   parents   0 1 2 3 4
   (including in-laws)

   brothers/sisters   0 1 2 3 4 5 or more

   grandchildren   0 1 2 3 4 5 or more

   grandparents
   other relatives   0 1 2 3 4

Finally, we have asked a variety of questions about you and your religious life. We may have missed some areas that you find very important. If so, please complete the following sentences. (You do not have to complete either of these sentences if you have already expressed your own sense of faith and congretational life in an adequate way).

1. For me, the most important aspect of my personal faith is_____

_____

_____

2. For me, the most important characteristic of my congregation is _____

_____

_____

-- THANK YOU VERY MUCH FOR YOUR COOPERATION --

Please put your completed questionnaire in the enclosed envelope NO POSTAGE is needed.

APPENDIX 5–2

Presbyterian Panel

April, 1979, Questionnaire

The Vocation Agency of the General Assembly is making a study of the ministries within our United Presbyterian Church. This Panel, which is part of a larger study, seeks to learn how people in our denomination understand and carry out those ministries. From this study, the Vocation Agency hopes to recommend ways in which pastors and sessions can exercise the kind of creative leadership that will enable their membership more faithfully to fulfill Christ's mission within the congregation and in the world.

1. The word "ministry" is used with different meanings. Please circle the number opposite <u>each</u> of the following statements which best represents the extent of your agreement with that statement.

	Strongly agree	Agree	Agree & disagree	Disagree	Strongly disagree	No opinion
Ministry is the special work of the pastor which serves the spiritual needs of the congregation (preaching, Bible teaching, pastoral calling, etc.)	1	2	3	4	5	6
Ministry is the work shared in by pastors and elders which serves members of the congregation and their spiritual needs	1	2	3	4	5	6
Ministry is the work shared in by the whole congregation which serves the people of the congregation	1	2	3	4	5	6
Ministry includes serving people of the community outside the congregation such as visiting prisoners, volunteering for community service projects, or serving on the boards of community organizations	1	2	3	4	5	6
Ministry includes corporate action by the church to change unjust economic or political conditions of life (such as a task force to deal with issues related to the disparity between rich and poor nations)	1	2	3	4	5	6
Ministry includes the ways a member lives out his/her faith in relation to family, friends and neighborhood	1	2	3	4	5	6
Ministry includes the ways a member lives out his/her faith in his/her occupation	1	2	3	4	5	6

2. To what extent do each of the following statements accurately describe your congregation? (*Circle <u>one response</u> for each.*)

	Very much like my congregation	Somewhat like my congregation	Only a little like my congregation	Not at all like my congregation	Don't know
Members have a clear sense of the congregation's purpose	1	2	3	4	5
Pastors and lay leaders share leadership as genuine partners	1	2	3	4	5
Members know that the church has high expectations for their commitment to and accountability for service	1	2	3	4	5
Members actively serve in the community	1	2	3	4	5
Members actively participate in evangelistic activities	1	2	3	4	5
Members pray together in many different times and places about common concerns	1	2	3	4	5
Members are involved in the work of the church as soon as they unite with the church, if not before	1	2	3	4	5
Members may choose many different ways to serve	1	2	3	4	5
Members are challenged in specific ways to participate in community activities or organizations	1	2	3	4	5
Pastor(s) invite the sharing of joys and concerns before offering the pastoral prayer during Sunday worship	1	2	3	4	5
Members frequently minister to one another's needs	1	2	3	4	5
There are many small groups or other face to face opportunities for study, prayer, and mutual ministry	1	2	3	4	5

Members feel the congregation is like a warm, caring family	1	2	3	4
Members take initiative in identifying needs and proposing ways to serve	1	2	3	4

3. When you think of the terms "vocation," or "Christian calling," which of the following comes to your mind MOST READILY? *(Please check only one response.)*

(Col 31)   1___I am not familiar with these terms

2___terms which have to do with the ordained ministry

3___terms which might apply to anyone who feels called by God to enter some specific occupation like a doctor, teacher, mechanic

4___terms which mean that God wants us to live a responsible Christian life in whatever we do

5___terms which mean that God wants a person to enter some form of full-time Christian work

6___terms which mean the same as occupation

7___other *(please describe)*_____

4. Who suggests most of the ideas for new programs in your congregation? *(Check one response only.)*

1___pastor   3___elders   5___other church members

2___other church staff   5___church officers other than elders   6___don't know

5. How does most planning for the work of your congregation take place? *(Check one response only.)*

1___The pastor plans the programs and informs the session

2___The pastor (and staff if any) plans the programs and gets session approval

3___A few strong lay leaders make the plans

4___The session plans the programs

5___Session committees plan the programs and secure session approval

6___There is broad participation and input from church membership through expanded session committees followed by session approval

7___I am not sure how plans are made

8___Other _____
                              (Please specify)

6. How often have you observed the following types of relationships between pastors and lay persons? *(Circle one response for each.)*

	Frequently	Occa-sionally	Seldom	Never	No opinion
Pastors are forced to assume complete control of their congregations because of the failure or poor performance of lay persons in exercising leadership	1	2	3	4	5
Lay persons feel they should not attempt to perform those functions for which the minister has been specifically trained	1	2	3	4	5
Pastors are reluctant to invest the time required to develop effective lay leadership	1	2	3	4	5
Pastors do not know how to encourage members to take leadership	1	2	3	4	5
Active exercise of leadership by members appears to be threatening to the status and self-understanding of pastors	1	2	3	4	5
Church members want to see their pastor as a very human person like themselves but with access to special resources	1	2	3	4	5
Pastors and lay persons seek a relationship in which there is freedom to complement each others' knowledge and skills	1	2	3	4	5
My experience has been that these relationships are too diverse to categorize	1	2	3	4	5

7. From what source(s) do church members receive the most adequate training for the leadership positions in your congregation? (Check <u>one</u> response only.)

1____Presbytery events or programs

2____Synod events or programs

3____Leadership programs developed in your own congregation

4____Teaching, preaching guidance by the pastor

5____Reading and individual study

6____Interdenominational events

7____Other_____

(Please specify)

8. There are many ways in which pastors carry on their work. At different times they may give more or less emphasis to different aspects of ministry. Please indicate your opinion as to the relative priority which the pastor of your congregation has been giving to each of the following ways of working with the congregation. (Circle <u>one</u> response for each.)

	Very high priority	High priority	Low priority	Very low priority	No opinion/ don't know
(Col 43) Focuses attention on issues outside of the congregation	1	2	3	4	5
Inspires and motivates members to be involved in service in the community	1	2	3	4	5
Frequently communicates the importance and the possibilities of ministry by church members	1	2	3	4	5
Identifies and encourages the use of members' gifts and talents	1	2	3	4	5
Interprets biblical and theological perspectives on current issues	1	2	3	4	5
Listens to people and responds to their needs with caring love	1	2	3	4	5
Serves as a facilitator and provides resources to members in their ministries	1	2	3	4	5
Shares his/her humanity in specific ways	1	2	3	4	5
Develops confidence and feelings of self worth in church members	1	2	3	4	5
Asks people to do only what he/she would do	1	2	3	4	5
Clearly articulates a dream or goal for the congregation	1	2	3	4	5
Has a clear sense of his/her own appropriate roles in relation to the roles of church officers and members	1	2	3	4	5
Provides strong leadership in developing the program of the church	1	2	3	4	5
Responds to the program ideas of others and helps them to implement them	1	2	3	4	5

9. How much help in living a life of service to others (at home, at work, in the community or in the church) do you now receive: (Circle <u>one</u> response for each.)

	Very much	Quite a lot	Some	Little	None	Not sure
from Sunday worship services and sermons?	1	2	3	4	5	6
from fellowship with other church members?	1	2	3	4	5	6
from small study groups and prayer?	1	2	3	4	5	6
from personal Bible study and prayer?	1	2	3	4	5	6
from the way other church members love and accept me as I am?	1	2	3	4	5	6
from the way my pastor loves and accepts me as I am?	1	2	3	4	5	6
from the inspiration of my pastor as a model of Christian service?	1	2	3	4	5	6
from the way others in my congregation express their belief in my ability to serve?	1	2	3	4	5	6
from the work of the Holy Spirit in our congregation?	1	2	3	4	5	6
from appreciation I receive when I have served?	1	2	3	4	5	6

10. How often do you think of yourself as a "minister" to the people around you at home and/or at work? (*Check one response.*)

1___daily

2___several times a week

3___about once a week

4___2 or 3 times a month

5___about once a month

6___several times a year

7___once a year or less

8___never

11. If a program in your congregation seemed to be in jeopardy because the members in charge were not carrying through on their commitments, what do you think your pastor would be most likely to do? (Pastors answer in terms of what *you* would be most likely to do.) (*Check one response only.*)

(*Col 68*) 1___allow the program to fail without attempting to intervene

2___step in and take control in order to save the program

3___encourage the persons involved by providing additional resources

4___assign responsibility for the program to another person or group

5___other_____

(Please specify)

12. To what extent do you agree with the following statement: The terminology used by most pastors and lay persons is so different that they frequently do not really understand each other. (*Check one response.*)

1___Strongly agree

2___Agree

3___Agree & disagree

4___Disagree

5___Strongly disagree

6___No opinion

13. Do you feel that you have a vocation or Christian calling? (*Check one response.*)

1___yes   2___no   3___not sure   4___I don't feel I understand these terms

If "yes," when do you feel your Christian calling began? (*Check one response.*)

1___when I decided what kind of occupation I would prepare myself for

2___when I started work in a job I thought I would spend much of my life at

3___when I was baptized

4___when I became a member of the church

5___when I recognized injustice or social need

6___when I committed my life to Christ

7___when I began to think seriously about the kind of person I want to be

8___at some other point in my life, namely:_____

(Please specify)

APPENDIX 5–3

An Exercise in Determining Mission Emphases *
Henry A. Blunk

During Meeting 6, you will be making some decisions about the mission emphases of your congregation for the months ahead. The following weighting exercise will prepare you for that. It deals with your personal life, but in the meeting you will be deciding what you as a group think the emphases of your congregation should be.

■ Pretend it is now 1 P.M. on a weekday. Considering your own personal circumstances, decide among the following areas of your life the activities that you think you need to be doing from 3 P.M. to 9 P.M. this evening. Check one appropriate choice for each activity. What activities would you emphasize? To which would you give minimal attention?

■ Participate in your favorite recreation, like playing cards or watching TV.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Take care of personal hygiene, like taking a bath, getting a haircut, seeing a physician.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Attend to a church responsibility.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Engage in a family activity.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Prepare and/or receive nourishment by eating at home, snacking, or going out.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Do some household task you've been intending to do.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Visit a friend or neighbor.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Do something for personal enrichment, like reading a book, or listening to music.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

■ Complete a job started earlier at your place of employment.

____ Do more (than you would normally do).

____ Do some.

____ Do less (than you would normally do).

____ Do none.

Probably you would not spend the entire six hours doing only one thing. You would plan to do several things and to leave others undone. That is the way it will be with your congregation's mission. The leader will be prepared to help the group decide what should be emphasized in your congregation's mission.

APPENDIX 5–4

Questions for Use in Evaluations of Congregation-Sponsored Workshop, Conference or Seminar-Type Events

The purpose of this instrument is to provide a sampling of questions that might be used in evaluating certain type: of events sponsored by congregations. The order in which the questions are presented is not a suggested order, since it is assumed that not all of the items would be used. The numbering of the questions, therefore, is simply for ease of reference. The questions are designed to be used as models of questions which congregations might use *after modifying them to suit their particular needs/circumstances.*

Background Questions (About Participants in the Event)

The following questions about your background will help us to understand possible differences among respondents in their evaluations of this event.

1. What is your age? ____   2. Your sex?   ____male   ____female

3. What is the number of years you have been a member of or a regular participant in this congregation? ____

4. Did you have a planning and/or leadership role in this event?

    1 ____ yes   2 ____ no

5. How would you evaluate the following aspects of the event? (Select ONE response for each item listed.)

	Very Good	Good	Average	Poor	Very Poor
Leadership	____	____	____	____	____
Meeting design	____	____	____	____	____
Materials used	____	____	____	____	____
Group process	____	____	____	____	____
Overall content	____	____	____	____	____

6. As a result of attending this event, did you increase your knowledge (skills, understanding, whatever was the intended goal of the event) in . . . financial stewardship (strategies for evangelism, teaching adolescents, etc.)?

    1 ____yes, to a great extent   3 ____no, not really
    2 ____yes, somewhat   4 ____not sure

    If "no," what would help you in this area?

7. Do you think the amount of time allocated to various components of this event (retreat, workshop, **seminar, etc.**) was:

	Too Little	About Right	Too Much
Devotions/worship.............................			
Fellowship opportunities.......................			
Personal time.....................................			
Study time...			
Formal presentations...........................			
Small group discussion.........................			
Panel discussion..................................			
Other_____...............			

8. Please check the one response that best represents your evaluation of the following **aspects of this event.**

	Strongly Agree	Agree	Disagree	Strongly Disagree
I felt free to be open and honest in small group sessions......................................				
I know more about this subject than I did before I attended this event...............				
The accommodations provided for this meeting were adequate..........................				
Participants were friendly and made everyone feel included in the group				

(List other items and goals of the event that you would like evaluated.)

9. How well would you say you understood the purpose of this meeting?
   1 ____very well   2 ____fairly well   3 ____not very well   4 ____not at all

10. If another workshop of this type were offered would you attend?
    1 ____yes, definitely   3 ____no, probably not
    2 ____yes, probably   4 ____no, definitely not

    If "no," why is this the case?

11. What topics (and speakers) would you suggest for future events of this type?

12. What topic would you particularly like to see included in a future workshop event?

13. Please rate the resources used during the course of the workshop.

	Very Useful	Useful	Not Useful
Resource A...			
Resource B...			

(continue listing resources to be evaluated)

14. a. What do you feel are the most important concerns in the area of ____(whatever was the topic of the event)?
    b. Were there concerns addressed adequately during the course of this workshop (seminar)?
       1 ____most were   2 ____some were   3 ____some were not   4 ____most were not

15. Were any points of view expressed during this event with which you are not comfortable? 1____yes   2____no
    If "yes," what were they?

16. What would you say was the most outstanding new experience/information you gained at this event?

17. a. What did you understand to be the goal(s) of this event?
    b. To what extent would you say that this goal was realized?

    1 ____fully realized

    2____to a great extent   3____somewhat

    4____only minimally   5____not at all

18. What do you wish would have happened at this event that didn't happen, if anything?

19. What about the timing of this event? Was it a good time for you?
    1 ____very good   2 ____not good, but manageable   3 ____somewhat difficult   4 ____very bad

20. What month of the year (time of the week, time of the day) would you recommend for scheduling of future events of this kind?

21. What about the cost of attending this event (where applicable)? Did you find it was reasonable or too high?
    1 ____reasonable   2 ____too high

22. Please give us any suggestions you might have about how future events of this type could be improved.

23. Is there anything else that you would like to say to the planning committee or leadership of this event? If so, please use the space remaining to do so.