

**Assessment Tools you can use**

# SWOT Analysis

(strengths, weaknesses, opportunities, & threats)

Strengths	Weaknesses	Internal Inside the congregation
Opportunities	Threats	External Outside the congregation

When looking at the strengths and weaknesses, the leaders look inside the congregation – to explore what’s being done well and not so well in terms of programs and congregational care.

When looking at opportunities and threats the leaders are looking outside the congregation – to describe the congregation’s setting or context, both locally and globally.

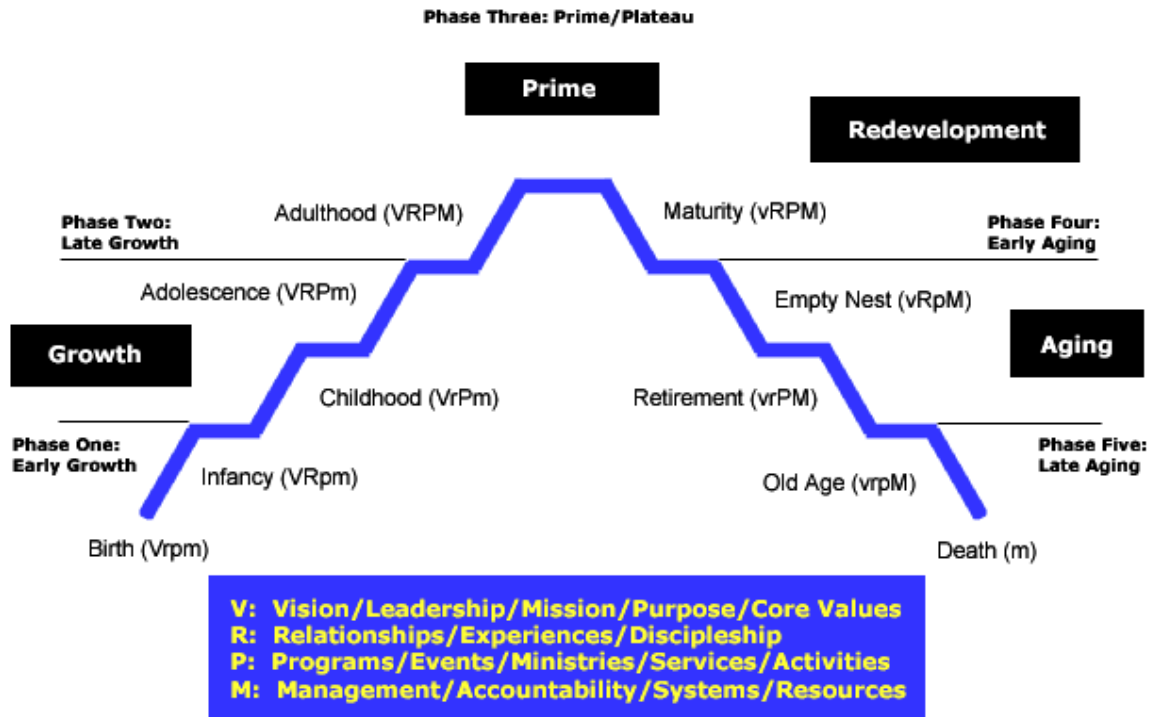
The tendency once the SWOT is complete is to focus on the weaknesses and threats ( the negative aspects of themselves). It is also very important to look at the strengths and opportunities. It’s those strengths and gifts that will support movement into the future!

One outcome from this could be to help shape 3-5 key questions for congregational planning.

Taken from Holy Conversations, by Gilbert R. Rendle & Alice Mann, p. 19-20.



## The Life Cycle and Stages of Congregational Development



Copyright 2001, Rev. George Bullard, D. Min.

Found at <http://www.congregationalresources.org/BullardLifeCycleChart.asp>

### Four organizing principles:

**Vision:** the current understanding of God's strategic direction for a local congregation – cast by leadership, owned by congregation..

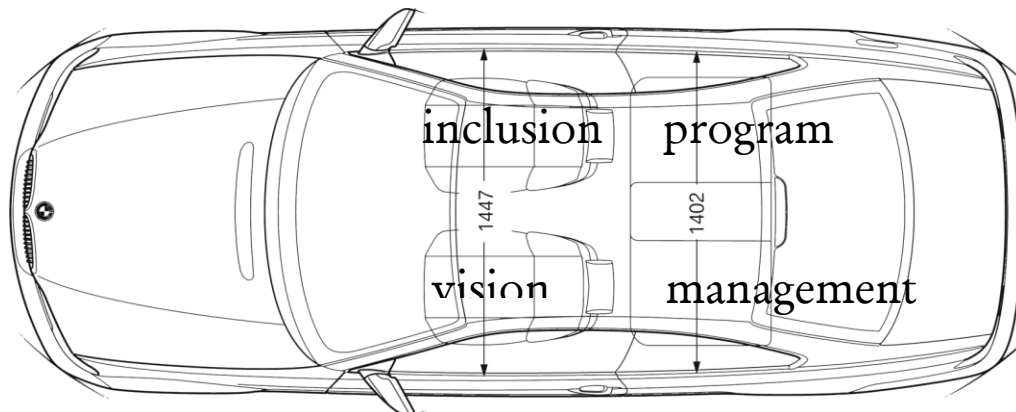
**Inclusion:** the relational processes by which people are converted, included, assimilated, and utilized...

**Program:** the functional attempts to provide ministries related to the inclusion process...

**Management:** the administration of resources, decision-making structure...

For more from George W. Bullard, Jr. go to <http://bullardjournal.blogs.com/>

## Bullard's four organizing principles & the car metaphor:



1. The visionary must be the driver. They steer the car in the right direction and keep their foot on the gas. They provide the understanding and perspective and excitement about what it not, but what can be.
2. they relational person sits beside the driver. They make sure the ride is enjoyable. They make sure that people feel wanted and needed and part of the a bigger project and are happy to be along for the ride.
3. In the back sits the managerial person. They make sure that the finances are taken care of and the administrative details occurs that keep the car running and filled with gas and tuned up.
4. Beside the managerial person sits the program director. They are concerned that the organizational structure is appropriate for the task and that all appropriate groups are being addressed. They are concerned that there are no marginalization of certain groups and that everyone's needs get addressed.

This helps in that when there is a vision set for a new direction, it is not enough to say "let's go for it!" **All four people and functions must be in place.**

- without the visionary there is no direction and purpose
- without the relational aspect people will be discouraged or not buy in
- without the managerial it may collapse because of lack of resources
- without the organizational it may fall apart or become divisive because of conflicting expectations.

**Without all four in the RIGHT place, it will not run.**

- if the relational person is driving, there will be a desire for fun and happy people which can begin to feel pointless if there is no movement.
- If the managerial person is driving, there will be over emphasis on detail and ensuring that everything is running smoothly, but the direction will be lost.
- If the program director is driving, people will be busy doing things and being involved, but there will not be the overriding sense of purpose – the big picture.

# Assessment Questions for Personal Interviews



(This material comes from Deeper Waters ministry - an Outreach Canada ministry under the leadership of Alan Simpson – [www.deeperwaters.ca](http://www.deeperwaters.ca))

Introduction - Describe your spiritual journey:

Member since? \_\_\_\_\_

How long have you been at this church? \_\_\_\_\_ Involvement?

1. If I moved into this area would you invite me to this church? Why should I come to this church?
  
2. What makes this church unique or special among others in our area?  
**Note:** for leaders you might change #1 & 2 and ask: 1) What is the greatest strength of this church? Why? And 2) What is the greatest weakness/challenge of this church?
  
3. What is the vision or direction of this church? What will it be like in 5 years?
  
4. Briefly describe when you have been the most disappointed with the church?
  
5. If the church could improve in one key area, what would it be? Why?  
**Note:** alternate questions for leaders could be 1) What is the issue/problem/conflict in the church right now? 2) Why? When did this start? What is the root cause of the present problem? 3) What do you believe is the answer?
  
6. What would have to happen in order for this change to occur?
  
7. What are the most urgent issues this assessment must address?
  
8. Who do you trust the most or who do you look to personally for spiritual leadership in this church?

# Questions to Help Assess the Temperature of a Congregation

*This material comes from Alan Simpson of Deeper Waters - a ministry of Outreach Canada*

## **Introduction:**

Part of assessment is creating an environment where people can be heard and where you as the facilitator or coach can listen and take note of what you see and hear for further reflection and follow-up.

The following questions can be used with groups of various sizes. They will aid in getting a good read on the spiritual climate of a congregation as well as help the people gain greater awareness of what is really going on. The data will also assist you in helping them plan for their future.

When the process is led by a trained facilitator or coach who understands the value of listening, can capture what's said, and allow people to interact good things happen and God works. Here are the questions:

1. How is God speaking to you personally through Scripture?
2. How is God speaking to us through Scripture as a body?
3. As we reflect on what God is saying to us, what core values (or common themes) do these scriptures suggest?
4. How well are we doing or practicing these values? (give each value a letter grade between A-F).
5. As we look at the values we are not practicing, what are the barriers keeping us from living out those values?
6. What is it about me (us) that contributes to the problem?
7. What are the strengths and weaknesses of our church?
8. If we cross out strengths and write "threats"; cross out weaknesses and write "opportunities" what do these two lists say to us now?
9. What are the top needs, problems or issues in our church that must be addressed?
10. What are the top three issues or priorities that must be addressed in the next 3-6 months?

[With this information you will not only have data to work with but the people themselves will have been impacted and be more engaged in the process of change and transformation.]

# Values Clarification Exercises

*Adapted from Robert Logan & Neil Cole's church planting workbook*

## Exercise #1:

1. Prayerfully investigate Acts 2:42-47
2. List the values embedded in the passage, and the corresponding behaviors.

Values	Behaviors

3. As you look at your life and ministry, what is it about your community that reflects Jesus?

## Exercise #2:

1. Write down a list of your values in the left column (what are the 5-10 things that define who you are as a community and what's important to you?).
2. Associate the Scriptures and behaviors you believe and practice that support these values.

Values	Scriptures	Behaviors
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

### Exercise #3:

**1. Brainstorm:**

- Give each person 7 small post-it notes (or less per person with a larger group)
- Think about the characteristics of an ideal organic church
- Work in silence for 5 minutes
- Prayerfully write down a maximum of 7 characteristics on the post-it notes (one per note)

**2. Cluster:**

- On a couple of big white sheets, put all the post-it notes up
- Silently cluster the notes into groupings that are similar
- Work for 5-7 minutes in silence, then call time!

**3. Focus:**

- Go to each cluster and read ideas aloud
- Ask the team if all those ideas make sense together (remove post-it notes that don't fit and place them to the side)
- Have team name each group – stating it as a value
- Once you've named all groups, add the extra notes you removed earlier into an appropriate group
- See if any of the clusters belong together – try to reduce the number of clusters to 5-7 groups
- Confirm that these values will achieve your desired outcomes of your ideal church or ministry

**4. Evaluate:**

- Ask: To what degree have we lived out these values?
- What will we have to do differently for these values to become a reality in our church?





**Strengths Identified – *things we do well***

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**Needs Identified – *areas we need to address***

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## Ministry Fitness Check Discovery Meeting



### FAQs

#### Why did you do this survey?

- It helps your church get a pulse for your overall health.
- It serves to inform a Spirit-led planning process.
- It gives you a reality check and brings to light both things to celebrate and issues that need addressing.
- It gives the entire congregation a chance to be heard.

#### What are the ground rules for this meeting?

- No one gets to be wrong!
- Don't jump to conclusions – just make observations.
- Trust God in and through this process.

#### What's the format for this meeting?

- We'll look at the survey results in bit size pieces starting from the big picture and moving to the specifics.
- We'll use discussion groups to give you opportunity to share your comments, observations and insights.
- We'll allow each table to feedback to the whole group.
- We'll summarize our findings as a group.
- We'll discuss the "what's next" question.

#### What's my role as your coach?

- To facilitate your conversation with each other
- To act as your tour guide for this leg of your journey

*So be careful how you live. Don't live like fools, but like those who are wise. Make the most of every opportunity in these evil days. Don't act thoughtlessly, but understand what the Lord wants you to do. Ephesians 5:15-17*