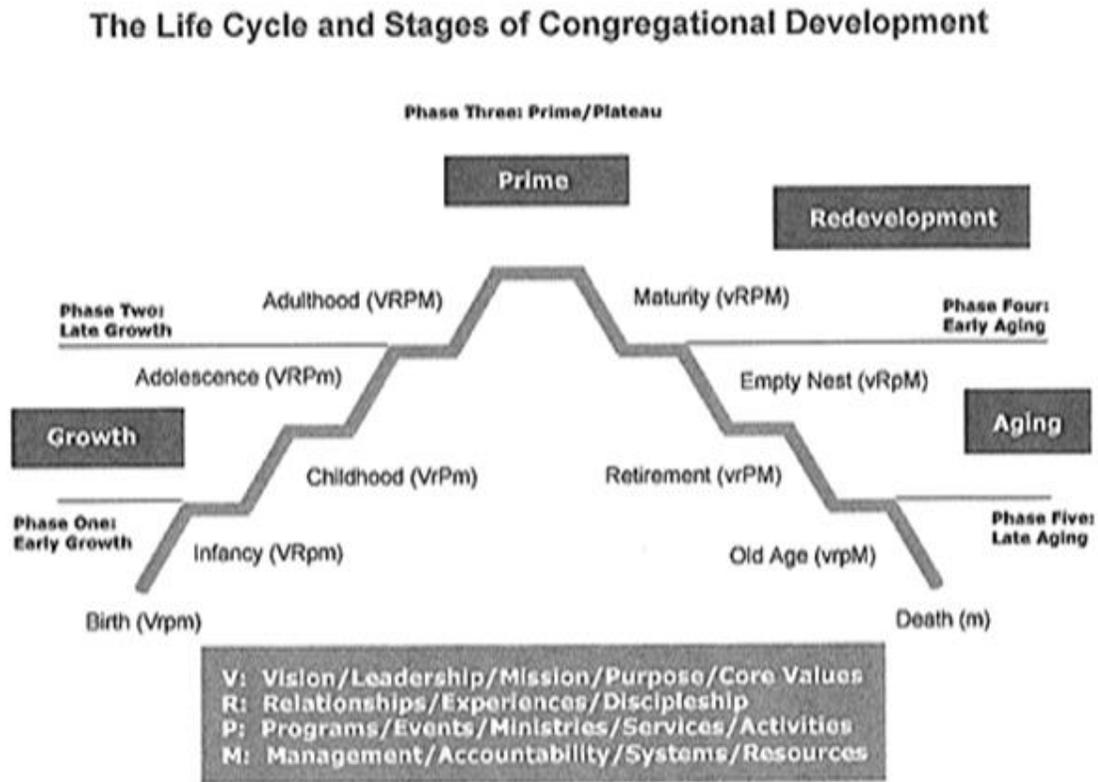


Appendix 3

Congregational Redevelopment Sections*

Note from the MST: Having studied the *Spiritual Strategic Journey: Tutorial for Congregational Redevelopment*, the MST believes the following sections, descriptions, and recommendations apply to the present and future of Third Presbyterian Church.

Life Cycle Chart



Congregational Life Stage – Empty Nest

If a congregation does not redevelop during Maturity it will move on to the Empty Nest stage. Empty Nest is when *Vision* and *Programs* are no longer dominant or fully developed. The congregation is experiencing disintegration of the quality and quantity of programs, ministries, and activities.

Management is driving the direction of the congregation.

Relationships, while still vital, are turning increasingly inward in their focus.

Empty Nest has three phases.

Phase one is characterized by nostalgia that carries with it a hope that tomorrow will bring the return of yesterday. Most stories are about the glories of the past and not the anticipation of the future.

Phase two is characterized by disappointment that triggers a renewed call for commitment by the faithful core. Overachieving persons demand that everyone be as committed as they are to the redevelopment of the congregation.

Phase three is characterized by anger that results in a pattern of blaming. Often blaming focuses on the leadership of the congregation, even the pastor.

Empty Nest represents what can turn out to be the angriest stage of the life cycle for a congregation.

The Empty Nest stage is discussed further in my article, "The Empty Nest of a Congregation."

The Empty Nest of a Congregation

Overview

This article explores the seventh of ten stages of development in the life cycle and stages of congregational development: Empty Nest. The ten stages are grouped into five phases. Phase Four: Early Aging involves an indefinable number of years in the life of a congregation. It includes the stages of Empty Nest and Retirement. To understand the Empty Nest stage appropriately it is necessary to look at the transition from the Maturity stage, understand the place of the organizing principles in the Empty Nest stage, review the characteristics of this stage, and determine how a congregation makes the passage to the Retirement stage.

How Does a Congregation Make the Passage to Empty Nest?

When a congregation is twenty-five to thirty-five years old, it then moves to Phase Four, which is Early Aging. This occurs when the lack of an empowering vision begins to have visible impact on the quality and quantity of programs, ministries, and activities.

It is not intentional effort that moves a congregation from Maturity to Empty Nest, but the lack of it. When a congregation does not respond to the incipient qualitative and quantitative changes of Maturity, it allows the need to hold on to past gains to give more control and authority to its management systems.

Congregational members and regular attendees begin to forget that it was an empowering vision that helped them to realize their greatest potential during Adulthood. A few people who realize what is happening begin to press the leaders of the congregation to respond with greater zeal to the opportunities and challenges the congregation faces.

What is the Place of the Organizing Principles in the Empty Nest Stage?

Empty Nest is that period when relationships and management are dominant. Vision and programs are no longer dominant. Management is controlling the direction of the congregation. Congregations in Empty Nest are no longer living out the vision that God has given them for a congregation that ought to be present in a certain place or target group of people. Vision is the fuel or energy that will drive the congregation forward throughout the growth side of the life cycle. Vision is the current understanding of God's spiritual strategic direction for a congregation that is cast by leadership and owned by membership.

Programs, which had just finished rising to their greatest qualitative height during Maturity, now are in quantitative decline. Soon they will experience qualitative decline. However, congregations notice the loss of numbers first. It notices that worship attendance is decreasing, as well as the attendance in various programs, ministries and activities.

The quality drops as the same level of gifted and skilled people are not present to carry out the programs. As congregational members and attendees comment and act on the loss of quantity and quality, the loss intensifies. Programs are the functional attempts to provide projects, ministries, services, activities, and training for people connected to the congregation by membership, fellowship, or through relationship processes.

Relationships are still happening in the life of the congregation, but not at the rate that is sufficient to replace either the active people who are no longer attending, or the inactive people joining other congregations.

Relationships are the spiritual and relational processes by which persons are brought to faith in God through Jesus Christ, become connected to a local New Testament congregation, are assimilated into the fellowship life and care ministry of a congregation, have opportunities for spiritual growth and leadership development, and are mentored to use their gifts and skills through Kingdom involvement.

Management, which moved into the driver's seat during Maturity, is now well established in its new lead role. Any hope of a quick return of vision as the driving force is gone, and congregational members and regular attendees begin to realize this situation. The primary role of management is to provide the systems and structures that work in an integrative pattern to undergird the fulfillment of vision, and the implementation of relationships and programs.

What are the Characteristics of the Empty Nest Stage?

Empty Nest is that stage of a congregation's life cycle when it is at first nostalgic, and later angry about the loss of the past. Ultimately the congregation will look for something or someone to blame for the situation in which they find themselves. During Empty Nest the programs begin to disintegrate. This is the Avis Rent-A-Car period of the life of the congregation. The congregational motto is, we try harder, but we're still number two.

Congregations redouble efforts because attendance is down, money growth has stopped as compared to increases in the Consumer Price Index, usually outstanding programs are second best compared to what they used to be, and confidence in the ability of the pastor to lead the congregation has diminished.

Some people are convinced that it is a matter of commitment. If everyone were just more committed to the congregation, then things would be better. Harder work is requested from the pastors, staff, and lay leaders. More sacrificial offerings are insisted on. More regular attendance at events other than the primary worship services is held up as a sign of peoples' commitment.

Empty Nest starts with a spirit of nostalgia. The hope exists that tomorrow will bring a return of yesterday. The stories told by long-term members of the glory years are not recognizable to newcomers as identifying the same congregation. People talk specifically about the way things used to be. Most of the dreams are of events of the past instead of visions of the future.

The longer a congregation remains in Empty Nest, the more likely the nostalgia will turn to anger. When this happens, the barriers may not just be ones of aging, but also ones of dysfunction.

Blaming becomes a popular topic of congregational fellowships. A layperson, a lay group, a staff person, or the pastor may become the focus of blaming. The rhetoric becomes pagan as people want to symbolically sacrifice someone to the gods of success. The thoughts are to get back, not move forward, to the way we used to be.

Whatever is not functioning to past standards must be the object of increased efforts to make it work better.

The congregation in Empty Nest may telegraph its time focus by the age group it wants to target with the most efforts. Congregations who want to target teenagers want to focus on yesterday. Those who want to target senior adults want to focus on today. Finally, congregations who want to target adults ages 25 to 45 and their children want to focus on tomorrow.

Empty Nest congregations tend to have the most severe conflict of any stage of development. Second are Retirement congregations; third are Adolescent congregations; and fourth are Infancy congregations. In Empty Nest the conflict comes about as angry people clash, but do not necessarily leave the congregation in large numbers.

How Does a Congregation Make the Passage to Retirement?

Time has broken down at this point in the life cycle. It is difficult to know how long a congregation may remain in Empty Nest. It appears that a congregation can go through multiple rounds of Empty Nest before either redeveloping or moving farther down the Aging side of the life cycle.

The key factor that sets in when a congregation is getting ready to move from Empty Nest to Retirement is private despair. Part of the despair may be weariness from the struggles of Empty Nest.

Long-term members begin to feel that their congregation is no longer a good place to invite new people to come for worship, spiritual growth, and fellowship. As a result they become hesitant in their ministry to lost, unchurched, de-churched, and hurting people.

Retirement begins to emerge when these same people begin to express excitement about making another major effort to turn around the congregation. They look forward to revitalized and new programs that a newer, younger pastor, and the new members that he can attract, can start.

Choice: Neighborhood or Community Focused Congregation

What is the essence of this choice?

Choose to become a congregation that intentionally focuses on the programs, ministries, and activities that meet real needs, of real people, in real time who reside in the neighborhood (within one mile) or larger community (within two to three miles) near the location of the congregation.

Who ought to consider this choice?

Congregations with a strong, deep, and abiding commitment to their location to such an extent that if they were not ministering their context they would feel a sense of loss.

Congregations who show a positive ability to reach for worship, learning, fellowship, and ministry people within their neighborhood or community.

What are strategic change and transition issues to address?

This choice involves risking losing, over a period of time, the support and participation of people who drive into the congregational location from the suburbs as they:

- Connect with a congregation closer to their residence.
- Drop out of regular or irregular church attendance.
- Leave when the worship, programs, ministries, and activities of their congregation no longer speak to their needs.
- Leave when the needs of their children, and even the urging of their children, motivates them to seek out a congregation with friends who are culturally closer to the culture of their children under 18 years old.

This is similar to the multiple communities congregation, except this choice does not intentionally seek to maintain worship, programs, ministries, and activities for people who reside farther away than three miles. Thus, it is appealing to a Christian missionary stance that should be taken by people who live farther away than three miles to lower their personal desires in favor of who comprises the current context around the congregation.

What are essential resources to have available to embrace this choice?

- Readiness, including a sense of urgency.
- Case studies to observe and from which to learn. Discover and dialogue with congregation who have made this choice at least five years ago is essential.
- Knowledge of the strategic actions called for by this choice.
- A vision incorporated into a future story of the congregation's potential.
- A minimum critical mass of leadership.
- Faithful, effective, and innovative actions.
- Coaching from a Christian coach.

Incremental Route

Incremental: When is this a positive route?

This Incremental Route is a positive route when: The disconnect between the congregation and its context is not great.

Note from the MST: Though the gap between Third and its context appear to be great, other elements of this route describe and fit well with the congregation's responses during conversations with the MST.

A lot of the leadership of the congregation is comfortable with tasks, details, rules, traditions, holding to the ethos of their denominational family, and retaining the culture of the congregation because it is intertwined with their understanding of the Christ presence in their congregation.

The congregation is made up of a lot of older people who have been on a Christ-centric, faith journey for many years, and they have been members of this congregation for a long time.

The congregation has several years to respond to the challenge of change and transition.

What is the equipping order for an incremental route?

The equipping order for an Incremental Route: Present Planning, Implementation, Evaluation, Readiness, Learning, Assessment, and Future Planning. The congregation should first develop a short-term 12-18 month strategy for initial changes and transitions it needs to make.

Second, the congregation should faithfully, and with as much innovation in methodology as possible, implement their short-term plan to build on any areas of strength.

Third, the congregation should regularly evaluate its short-term efforts to guarantee that they are indeed embracing greater efficiency and effectiveness in serving their context or the target group of people they are seeking to reach.

Fourth, while the short-term plans are being implemented, the congregations should seek to engage in readiness activities that deal with the issues of passionate readiness, spiritual readiness, leadership readiness, and strategic readiness.

Fifth, the congregation seeks to discover the areas where they appear to need greater wisdom or learnings, and then seeks avenues to building the capacities they need to take the next steps in the change and transition journey.

Sixth, after a year into implementing the short-term plans, the congregation should honestly assess the strengths and potential of the congregation within its context, using the Congregational Issues for a Spiritual Strategic Journey Initial Assessment.

Seventh, when ready the congregation should write its future story of what it will be like ten years from now if it is successful in its spiritual strategic journey. The strategy of the congregation then becomes one of seeking to live into its future story.

Present Planning

Present Planning involves aligning the current resources (budget, staff, calendar, facilities) to fulfill the future story along the path of the key leverage points. The focus should be on efficiency and effectiveness, and on the greatest experiences of the congregation.

What are the crucial characteristics of Present Planning?

It imagines a detailed story of the congregation three to eighteen months into the future. It seeks to project how the congregation will do well its important tasks over the next three to eighteen months. It focuses on the efficient operation of the congregation in implementing its high priorities. It focuses on programmatic emphases and accountable management. It is perceptual more than conceptual. It is detailed rather than general or thematic. It is practical. It is clear. It is controlled in response to change situations. It is goal-oriented and is concerned about destinations.

Implementation

Implementation involves the regular implementation and navigation of the fulfillment of the future story of a congregation along the path of its key leverage points. These key leverage points will be comprised of relationship experiences, programmatic emphases, and accountable management.

Evaluation

Evaluation seeks to measure in what ways a congregation is successfully progressing towards making changes and transitions that produce transformation and that allow it to reach its full potential.

Key questions:

What is the evidence that this congregation is making successful changes and transitions?

What is the evidence that this congregation is experiencing transformation?

What is the evidence that this congregation is reaching its full kingdom potential?

Readiness

Readiness involves engaging in the readiness activities necessary for a congregation to achieve the change and transition necessary for congregational redevelopment to take place. Four aspects of readiness for change and transition must be addressed for a congregation to truly have readiness. In addition, an important part of readiness is understanding the numerology of various leadership communities that needs to be developed.

Readiness: Four aspects of readiness

Four aspects of readiness for change and transition must be addressed for a congregation to truly have readiness: Passionate readiness; Spiritual readiness; Leadership readiness; and Strategic readiness.

Passionate Readiness: Strong positive passionate readiness concerning the future of the congregation exists among many persons within the congregation. Urgency exists concerning needed changes and transitions that may lead to transformation.

This zealous sense of passion and urgency is derived from a positive feeling in favor of the future of the congregation, rather than a negative feeling that opposes or fights against some demon or negative factor in the congregation or its context.

Negative passion may lead to a future dysfunctional congregation with arrested development, rather than a transformed congregation.

Spiritual Readiness: Strong positive spiritual readiness where there is a belief that God is up to something transformational through this congregation.

Personal and congregational community spiritual processes are engaged in that help. Spiritual readiness will require the congregation to engage in an intentional spiritual emphasis over a period of time such as Share and Prayer Triplets.

Leadership Readiness: Strong positive leadership is willing to exert empowering leadership to see that the congregation makes the changes and transitions necessary to achieve transformation and reaching its full kingdom potential.

Strong positive leadership is composed of people of passion, pastoral leadership, and people of position.

Strategic Readiness: A core of initiating leadership are fully aware of the types of strategies and tactics that will need to be used to make the necessary changes and transition leading to transformation and reaching the full kingdom potential of the congregation.

The Initiating Leadership Community participates in learning experiences that help them develop the capacity to guide each step of the spiritual strategic journey with full knowledge of the necessary steps.

Often initiating leadership communities seek external coaching assistance to mentor them along the journey.

Readiness: Various leadership communities

Readiness includes the development of various leadership communities: the Initiating Leadership Community; the Primary Leadership Community; and the Supporting Leadership Community.

The Initiating Leadership Community: The Initiating Leadership Community is made up of the people of passion, who are seven people or seven percent of the average number of active, attending adults—whichever is greater.

This leadership community represents the innovators and early adapters in the congregation who have the strongest positive passion concerning the future of the congregation, but not necessary the key roles or positions in the congregation.

Persons identified and connected with the Initiating Leadership Community must have passionate readiness, spiritual readiness, leadership readiness, and strategic readiness.

The intensity of their readiness must be at least a seven in all four areas on a scale of one to ten with ten being high.

The Primary Leadership Community: The Primary Leadership Community is made up of the people of position, who are 21 people or 21 percent of the average number of active, attending adults—whichever is greater.

The Supporting Leadership Community: The Supporting Leadership Community is made up of the people of participation, who are 63 people or 63 percent of the average number of active, attending adults—whichever is greater.

Learning

Learning involves engaging in education, training, and other experiences that develop the skill sets the congregation needs to fulfill its future story along the path of its key leverage points. Learning experiences should be offered on character, connections, competencies, and capacities.

Assessment

Assessment seeks to define the current reality of the congregation and its context or community. Congregational assessment focuses on two types of assessment: The core ideology; the four organizing principles. Contextual Assessment involves engaging in various assessment processes to determine the current and future reality for the context.

Congregational assessment: The Core Ideology or Master Story of the Congregation

Three elements—Eternal Mission, Everlasting Purpose, and Enduring Core Values—form the Core Ideology or Master Story of a congregation. Seldom are these elements all written down, yet they are still present and a part of the perceived reality of the congregation.

The Core Ideology does not change much, often, or fast, or it is not truly core or foundational to the congregation. It is just a collection of nice ideas. For change and transition to take place in a congregation, it is not necessary to be bound by the core ideology. However, the core ideology must be discovered, understood, respected, and paraphrased to the congregation by those who desire to lead change and transition. Doing so will often gain permission for emerging leadership to make the necessary changes and transition leading to congregational transformation.

The Eternal Mission or Theology of a congregation relates to its foundational understanding as to what congregations in general are all about. What are the spiritual, biblical, and theological underpinnings of congregations from the perspective of your congregational leadership? Why do congregations, in general, need to exist? What is their eternal mission that has always been, is, and shall always be? The understanding of the eternal mission of a congregation is not congregational specific.

That means that eternal mission relates to the understanding within your congregation as to why any congregation ought to exist.

The Everlasting Purpose or History of a congregation is the historical purpose or reason for which this particular congregation came into being. It relates to the founding purpose of your congregation and answers the questions, why did we come into existence?

It also relates to the founding story of your congregation that is generally formed during the first five to six years of the life of your congregation. The founding purpose and founding story tend to blend into one understanding of the early years of the congregation.

This understanding of the early years of a congregation tends to impact the life and ministry of the congregation long past the life of the founding members. It becomes an unspoken, and perhaps an unwritten, basic understanding of the driving purpose that impacts decisions made by the congregation long past the life and livelihood of the congregation.

The Enduring Core Values or Culture of the congregation is the set of social practices that the congregational participants value the highest or hold most dearly. These are almost always unwritten, and seldom spoken in a manner that people can quickly and easily identify them. Yet, break one of the core values and core members of the congregation may remind you that your actions do not meet the cultural standards or expectations of the congregation.

The Enduring Core Values are one of three types of core values seen in many congregations. First, are Enduring Core Values. These are past to present values that have developed over the history of the congregation. Examples include worship style; seasonal or liturgical calendar events and how they are done; the role and authority of the pastor; who or which families are the leaders; how decisions are made; unique theological positions. Seldom are these ever written down. They may be so assumed by long-term members that their actual existence is invisible to these folks. New members discover or stumble across these. Wise new pastors and staff members know to intentionally look for these core values early in their ministry in a congregation.

Second, are Fantasy Core Values. These are fantasy lists of what congregations wish were their core values. Often these are discussed and written during some type of planning process, but are not reflective of the true character and commitment of the congregation.

Third, are Future Core Values. These represent the core values the congregation is truly trying to live into. They become an emerging part of the life, ministry, and spiritual culture of the congregation. Then they are written down to challenge the congregation to stay with the journey they are currently experiencing.

There are four basic methods of determining core values. First method, direct generative dialogue: This involves group interaction where the perceived core values are brainstormed, categorized, discussed in a dialogical manner that generates new ideas or perspectives, prioritized, and reduced to a list of no more than seven core values that are passionately held by the largest number of people. Someone inside or outside the congregation may facilitate this

process. This process is best suited where there is general agreement on the core values and there simply needs to be a short process that allows for affirmation of the core values.

Second method, focus group interviews: This involves conducting a series of focus group interviews that ultimately involve at least 21 adults or 21 percent of the average number of active attending adults present on a typical weekend for worship, whichever is greater. The focus groups will have 7 to 12 person in them. Some of the focus groups need to be composed of people who have been members or connected with the congregation for approximately the same amount of time. Some of the focus groups need to be made up of people of various tenure of membership or connection in the congregation. The purpose of each of the focus group session would be to discover what people feel to be core values of the congregation.

Following the focus group interviews, two people from each focus group work on developing a common list of core values. This list is then presented to a representative group of the congregation for generative dialogue and consensus on the seven core values that are passionately held by the largest number of people. Someone inside or outside the congregation may facilitate this process. This process is best suited for congregations where there is some disagreement as to the core values.

Third method, congregational time line: This involves a learning experience where at least 21 adults or 21 percent of the average number of active attending adults present on a typical weekend for worship (whichever is greater) gather for an evening to talk about the past, present, and future of the congregation using a timeline approach that discusses the characteristics of the various stages of the life of the congregation. Emphasis in the discussion is given to sharing what were or are the core values closely held by the congregation during its various stages. The goal for the evening is to focus on seven core values that are passionately held by the largest number of people currently members or connected with the congregation. Someone inside or outside the congregation may facilitate this process. This process is best suited for congregations who have a lot of new members who do not understand the culture and heritage of the congregation.

Fourth method, Christ and culture analysis: This involves the use of any of the other three methods (direct generative dialogue, focus group interviews, and congregational timeline). However, here the focus is on the things that characterize the congregation that are related to a Christ-centric faith journey, and the things that characterize the congregation that have been picked up from the external cultural of the context, or the internal culture of the congregation over the past generation or so. The goal is to focus on seven core values that are passionately held by the largest number of people currently members or connected with the congregation. Someone inside or outside the congregation may facilitate this process. This process is best suited for congregations who are stuck in their past, and their past to present culture appears to be suffocating their spiritual vitality.

Congregational Assessment: The Four Organizing Principles

The four organizing principles are **Visionary Leadership; Relationship Experiences; Programmatic Emphases; and Accountable Management.** Throughout this tutorial Visionary

Leadership may be referred to simply as Vision, Relationship Experiences as Relationships, Programmatic Emphases as Programs, and Accountable Management as Management.

Vision, Relationships, Programs, and Management correlate to the first four factors of the Initial Inventory.

Understanding, strengthening in a manner that empowers congregational transformation, and appropriately positioning these organizing principles are crucial issue for congregations.

Congregations who are growing younger and more vital as a representation of the body of Christ have more emphasis on Vision and Relationships than they do on Programs and Management. Congregations who are growing older and more passive as a representation of the body of Christ have more emphasis on Programs and Management than they do on Vision and Relationships.

Visionary Leadership deals with who we are, what we believe or highly value, where we are headed, and how we are getting there. However, the majority of its focus is on developing an initiating visionary leadership community who are the casters and champions of vision. The pastor is the chief champion of vision, but not the sole or lone caster of vision. Vision must be cast by a passionate community of leaders who represent seven percent of the average number of active, attending adults in the congregation.

Relationship Experiences deal with how your congregation is doing at attracting people to a Christ-centric faith journey (evangelism) and at helping people who are connected with your congregation to be on an intentional and maturing Christ-centric faith journey (discipleship development).

Among the results of the faith journey of people in your congregation should be a deepening spirituality, the development of numerous new leaders, and a willingness to get actively involved in congregational leadership positions and in places of ministry service within and beyond the congregation (lay mobilization).

Programmatic Emphases deals with programs, ministries, and activities. If effective, your congregation is well known throughout your congregation—and your geographic community or the target groups you serve—for the excellence of these programs, ministries, and activities. If effective, your programs, ministries, and activities seem to be growing in numbers and quality. If effective, your programs are meeting real, identified spiritual, social, and emotional needs of people.

Accountable Management deals with the management systems of the congregation that focus on decision-making, resources of various kinds, and the underlining culture that impacts these. If effective your congregation has excellent, flexible management systems (teams, committees, councils, boards, leadership communities) that empower the future direction of our congregation rather than seek to control the future direction. If effective decision-making is open and responsive to congregational input. If effective finances are healthy and increasing each year. If effective the management systems are supportive of the visionary leadership efforts by the pastor, staff, and congregational leadership.

To illustrate this point further, I invite you to consider this metaphor!
Imagine a Sports Utility Vehicle (SUV) as a metaphor for the spiritual strategic journey of a congregation.

For the most effective spiritual strategic journey, where would you place Vision, Relationships, Programs, and Management in the SUV?

Vision would be driving and fueling the forward progress of the SUV.
Relationships would be navigating and flavoring the quality of the journey.
Programs would be in the back seat behind Relationships providing a system through which the best Relationships could happen.
Management would be in the back seat behind Vision providing a managerial infrastructure that empowers Vision.

What type of journey results from the situation where Vision is driving and Relationships is navigating?

A youthful and active journey.
A Global-Local mission-focused journey.
A journey where the discovery of tomorrow is the focus.
A journey where many risks are taken to explore new discipleship frontiers.
A journey where people resources are focused on mission rather than maintenance.
A journey with a clear vision of the destination, rather than a controlled mission of rediscovery old habitats.
A journey with great excitement and increasing joy.

For the most effective spiritual strategic journey Vision, Relationships, Programs, and Management are all properly aligned in the SUV.
No organizing principles are left at home.
All four factors are dominant and being fully expressed.
Alignment is the key!
Everyone has discovered their positive role in the journey and is expressing it with excitement.

What happens when Vision grows weary and needs to take a nap in the back seat? Who drives?

Management drives and moves from empowering the journey to controlling the journey. Vision is not necessarily gone, but is asleep and must have an empowering catalyst to awaken it.

What happens when Relationships' eyes get blurry from constantly reading the digital navigation system? Who navigates?

Programs navigates and moves from providing a system through which the flavoring of the journey can take place, to institutionalizing a system where the successful fulfillment of Programs becomes the measuring rod for determining the success of the journey.

What type of journey results from the situation where Management is driving and Programs is navigating?

An aging and passive journey.

A self-centered journey.

A journey where the recovery of yesterday is the focus.

A journey where few if any risks are taken to explore new discipleship frontier.

A journey where people resources are focused on maintenance rather than mission.

A journey with no vision of the destination, but only a controlled mission of rediscovery old habitats.

A journey with little excitement and increasing despair.

Various Contextual Assessment Processes

Contextual Assessment involves engaging in various assessment processes to determine the current and future reality for the context.

First, is observation of the context to see the emerging changes and transitions in the context. Yogi Berra was right when he said something to the effect that you can see a lot by looking. Driving and walking the congregation's context in groups of three, and then debriefing the experience, can reveal many characteristics of the context.

Second, are interviews with community social agents who are aware of the changes in demographics in the context that have not yet begun to be reported in statistical studies.

Who are organizations who notice early the changes in the demographics of a contextual setting? Real estate owners and agents; Schools; Hospitals; Grocery stores; Law enforcement agencies; Other organizations that deal with the public on basic life services.

Official reports from these organizations will not make it into published reports for use by demographic and psychographic information distribution channels until one to three years after significant trends have begun.

Third, is the securing of sophisticated demographic and psychographic reports for the context developed by government agencies, research and education institutions, and demographic distribution organizations.

These should be seen as a third channel in priority because they will lag behind emerging trends, and because they provide so much information that key leverage trends are difficult to determine. Such reports, where available, valid, relevant, and current may be used to document emerging trends. However, often these reports still have a basis in the government census figures that often are distorted, and less valid with each succeeding year following the initial research and report.

Future Planning

Future Planning seeks to tell the future story of the congregation, and then identify the key leverage points that will help the congregation reach its full potential, prioritize these key leverage points, and identify the character, competencies, capacities, and connections that need to be developed for the effective implementation of these key leverage points.

What is the future story of this congregation? What will characterize the life and ministry of your congregation ten to twelve years from now?

Focus on Exceptional Big, Holy, Almighty Goals: Identify the key leverage points that will help the congregation reach its full potential, prioritize them, and identify the character, competencies, capacities, and connections that need to be developed for the effective implementation of these key leverage points.

Identify key leverage points related to visionary leadership and relationship experiences and develop a (spiritual, strategic) journey around them.

Let's explore the crucial characteristics of future planning and some guidelines that might help a congregation through the process of developing its future story.

What are the crucial characteristics of Future Planning?

It imagines a story of the congregation ten to twelve years into the future.

It seeks to project how the congregation will live into that story over the next three to five years.

It focuses on the five to seven key leverage points that will make a significant difference in the ability of the congregation to transform, rather than on all the things the congregation can think about that it wants to be doing.

It focuses on visionary leadership and relationship experiences.

It is conceptual more than perceptual.

It is general and thematic rather than detailed.

It may be abstract at points because it is not always sure what form it will take.

Thus it may lack enough practicality.

It is fuzzy rather than clear.

It seems more like chaos than a controlled change situation.

It is a journey rather than a destination.

What are some guidelines that might help a congregation through the process of developing its future story?

Identify three scenarios (choices) your congregation would like to pursue. Explore redevelopment choices in order to stimulate ideas.

Brainstorm characteristics of the congregation if it follows each scenario (choice) for the next ten to twelve years.

Write three brief scenarios.

Choose one scenario to pursue more deeply.

Write the first draft of your future story.

Develop and implement a plan for sharing your story and building ownership.

Share your draft with other congregations for affirmation and challenge.

Rewrite your future story based on feedback and new insights.

Develop and implement a plan for sharing your story and building ownership.

Develop suggestions for how to live into the story.

Develop items to live into the story over the next 6-18 months (and the next 3-5 years).

Live into your story and reaffirm it through some celebration experience every 120 days.

**The sections of Appendix 3 have been adapted from *Spiritual Strategic Journey: Tutorial for Congregational Redevelopment* © 2004 Alban Institute*