

Healthy

Church



Initiative

SELF-STUDY &

CONSULTATION

INFORMATION

Preparation Checklist for Weekend Consultation

Steps Toward

Consultation

- 1) Vote of Administrative Council/Board to enter into the Healthy Church Initiative.
- 2) Once voted and approved, contact [insert name and contact information for your conference]
- 3) Schedule with your coach the pre-weekend consultation laity workshop – 6 weeks prior to the consultation weekend.
- 4) Creation of **Prayer Team** – This team will commit to pray regularly for changes.
 - For description of team duties see pages 71-73 of “Direct Hit, Aiming Real Leaders at the Mission Field” by Paul Borden. (*see section on Teams*)
- 5) Creation of **Leadership Team** – This team consists of the church’s Board/Council or a smaller group of leaders whom the pastor recruits to shepherd the HCI process. This team is responsible for the Self-Study material preparation and the complete HCI process through the follow-up coaching stage.
 - For description of team duties see pages 75-79 of “Direct Hit, Aiming Real Leaders at the Mission Field” by Paul Borden. A “Suggestions for Starting Your Two Teams” document will guide you in setting up the teams. (*see section on Teams*)
- 6) The Fee for the HCI, consultation, Peer Mentoring group is as follows: *EXAMPLE*
 - Worship attendance of the church, 399 or less the fee is \$400 (total for the process)
 - Worship attendance of the church, 400 or more, the fee is \$1000 for the process.
 - Make your check payable to: [insert information for your conference]
 - Your check is due to conference office by [insert date].

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Preparation Checklist for Weekend Consultation, Continued

Pastor Surveys

The church pastor will need to take the following two surveys and include them with the Self-Study submitted prior to the weekend consultation:

- DISC personality inventory – found online at www.pdiprofile.com
 - Purchase the book Strengths Finder 2.0 by Tom Rath. Complete the online survey to get your top five strengths.
 - Include the results of both surveys in the church's Self-Study report.
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One Month Prior to Consultation

- Pastor and congregation continue praying about the upcoming church consultation.
 - All self-study materials for consulting team should be submitted by now to the HCI coordinator. Send one hard copy and one digital copy to [insert name and contact information for conference coordinator]
 - Recruit the people for the focus group and inform staff and leaders of their expected participation in the weekend (see below for specifics).
 - Begin advertising the Town Meetings, time and date.
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Two Weeks Prior to Consultation

Submit the following to the lead consultant and HCI Coordinator electronically:

- The Friday interview schedule including names and times of interviews.
 - The list of all who will attend the Friday night Focus Group.
 - The list of all who will attend the all-day Saturday session.
 - The schedule for Sunday morning worship and town hall meeting.
 - Dates for your town hall meetings after the weekend (usually 3), and Church Conference date.
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Preparation Checklist for Weekend Consultation, Continued

Consultation Weekend –

Friday

Staff Interviews:

- Set up 45-minute interview times with each of the paid staff people (the actual interview is about 30-35 minutes with a short break included). Also, include unpaid staff if they are responsible for a ministry area. If you have a preschool or day care program, the director should be included in the interview schedule. The first interview will be one and a half hours with the pastor. The interviews will conclude by 5:00 p.m. The schedule should be backed up from 5:00, beginning in the morning with the pastor's interview, if necessary. Be sure to include a 30 minute lunch break.
- If you do not have more than 3 staff members, please get 3-4 more lay leaders, like the Lay Leader, Ad Council chair, PPR chair, Trustees chair, UMW, or UMM presidents, or other key leaders, children's area or hospitality, even if they are unpaid. We want at least six interviews plus the pastor, but no more than eight.
- Please write up a schedule for the interviews and forward a copy to the HCI Coordinator, at least two weeks before the church consultation.
- **Supper with Pastor, spouse and the Lead Consultant 5:00 pm**
 - This is an opportunity to hear from the pastor's spouse how things are going in the congregation.
 - We will be back at church by 7:00 for the focus group.
 - The dinner is provided by the lead consultant at a restaurant of the pastor's choosing.
- **Focus Group 7:00 – 8:30**
 - This is a group of members which represent a cross-section of the congregation. They should not be staff or relatives of staff or members in leadership roles. Very simply, these are people who are faithful in worship but have not staff or leadership responsibilities. The pastor is not a member of the Focus Group. The Focus Group will begin at 7:00 and end by 8:30 p.m.(or earlier).
 - Submit the names of these individuals to the lead consultant at least two weeks prior to the church consultation. It is good for the pastor to introduce the consultant who will lead the focus group and then leave for the evening.

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Preparation Checklist for Weekend Consultation, Continued

Consultation Weekend –

Staff and Leadership Sessions

— Flipchart & markers – plus a screen for the projector

Saturday

— A large sheet of paper and pens for each table

— 9:00 – 10:00 Ad. Council/Ad. Board meets with the coach

— 10:15 – 3:00 All church workshop

- All church members are invited to the this workshop, staff (paid and volunteer) and the leadership of the church are required to attend this 10am to 3pm session. The consultant team will be providing teaching which is designed to move people from maintenance to missional thinking. This is a “must meeting” for as many of your church as possible in order that attitudes and commitment to mission can be developed.
- Please arrange for a lunch to be provided for all participants and the consultation team. Also, please submit a list of all participants in this session to the consultant at least two weeks before the consultation weekend.

Report Written

— From 3-6pm (or later) the consultation team will meet to draft the report to the congregation which will be submitted in the Town Hall Meeting on Sunday.

— Please provide a room at the church where the team can meet. A copy of the report will be given to the pastor, on Saturday evening, and reviewed with them that evening.

— The pastor will arrange for copies of the final version to be run for the town meeting the next day.

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Preparation Checklist for Weekend Consultation, Continued

Consultation Weekend –

Worship and Town Hall Meeting

Sunday

- The schedule for the morning needs to include time for worship and one hour for the “Town Hall Meeting” at which time the report will be presented. The Town Hall Meeting can take the place of the Bible Class/Sunday School or can be presented at a congregation meal after worship.
- The selection of the times is totally up to the pastor. The actual time of the Town Hall Meeting should be selected when the most people will be present to hear the report. The pastor may choose to begin or conclude the Town Hall Meeting. Consultation with the lead consultant or coordinator will help in determining the morning schedule.
- It is important to share the dates for the upcoming meetings to discuss the report, probably 3 of these, and the date of the Church Conference for the vote on the prescriptions, at the Town Hall Meeting on Sunday.
- One of the members of the consultation team will deliver the sermon, and the pastor of the congregation will be the liturgist.

4 to 6 weeks Post Weekend Consultation

During this period of time, the pastor and congregation will decide whether to accept or reject the prescriptions offered by the consultation team. If the prescriptions are adopted a coach will work with the pastor and congregation for at the next 18 months.

- HCI Team is to electronically submit the report and prescriptions to **Tammy Calcote** TCalcote@moumethodist.org
Phil Neimeyer Phil.Neimeyer@gmail.com

If you have any questions on the church consultation, please contact the lead consultant for the weekend or the HCI Coordinator, **Phil Neimeyer (314.488.8884)**

Self-Study Quick Checklist



BEFORE you mail the Self-Study packet described in the following pages, please ensure you have included all of the elements listed below:

- Pastor's DISC[®] inventory (see pages 4 and 21)
- Pastor's StrengthsFinder[®] survey (see pages 4 and 21)
- Completed Readiness Test (see page 22)
- History & Description (see page 10)
- Demography & Statistics (see page 11)
- Community Study, MissionInsite, and Self-Study Group results (see page 12)
- Self-Study Questionnaire (see pages 13-16)
- Master hard copy of **all items** mailed at least four weeks before your consultation to:

Phil Neimeyer
3601 Amron Ct
Columbia MO 65202

- Email a digital copy of **all items** at least four weeks before your consultation to:

Phil.Neimeyer@gmail.com

At least two weeks before your consultation, email **Phil** with the following information:

- Interview schedule
 - Names of people attending the Friday focus group and the Saturday training workshop
 - Number expected for evening workshop after the pot-luck dinner
 - Dates for 3 town hall meetings after the consultation
 - Date for the church conference 30-45 days post consultation
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Self-Study

Instructions

1. It is best to gather a team to complete this Self-Study, made up of lay members as well as staff. The pastor needs to be involved and on this team but should not be chasing down lots of this information.
2. Please complete ALL aspects of the Self-Study and be sure to share this information with the Council/Board, and have them fill out the questions that are for them around the strengths and weaknesses and areas to change. This is very important for them to have time for discussion and for those results of their discussion to be included in the Self-Study material that is sent in.
3. You probably need to have 3 months to do all the parts of the study, including the leaders' discussion and opinions. The full final report needs to be in by about 6 weeks before your weekend Consultation. This gives us time to copy the materials and send them to the Consultation team, and time to study the documents in detail. It is best to send the final report digitally, with widely-used software, and all together, so that we do not get pieces misplaced. Also, send one master hard copy.
4. Sent separately, there is a simple one page Readiness Survey that is to be filled out by 20-25% of your active worshipping members (so if you average 100, have 25 fill it out)....it is best if you can have someone tabulate the survey and send in just the tabulated, summary copy; of course, this also needs to be shared with the leaders as they evaluate the full study materials.
5. Please send HARD COPY of the full Self-Study and a digital copy to:

Phil Neimeyer
3601 Amron Ct
Columbia MO 65202
Phil.Neimeyer@gmail.com
314.488.8884

Any questions, please call Phil.

Continued on next page

Self-Study, Continued

History and Description

1. Write a brief history of your congregation (maximum four pages). Include those events that contributed to periods of growth or decline in the number of people participating. Write in a factual style. Avoid the temptation to puff the story for public relations and the temptation to inject person commentary regarding past problems.
2. Provide a list of all full and part-time program staff positions for the last twenty years, or from the beginning if founded more recently. List schools and degrees for full-time program staff. Give the dates for people's tenure and state the real reason why individuals left. (Leave out the pertinent specifics only where required by law.)
3. Provide a list of all people who oversee specific areas of service. List the number of positions for which they are responsible in their oversight. State whether these people are full-time, part-time, or volunteer staff.
4. List dates and provide descriptions for any building construction, major renovation, land acquisition, or leasing of facilities. List the amount of acreage you own, lease or rent, the square footage of building(s), and number of parking spaces (distinguishing between off-street and street parking).
5. Write a summary of your congregational structure including the individuals or groups who are responsible for program decisions, budgeting, and financial oversight, buildings and grounds, and any other major interests of the congregation. List committees, task forces, program teams, etc. and explain how these relate to boards or councils. Provide an organizational chart that reflects your current structure.
6. List any formal ties or major ties to other organizations or associations. State how the congregation views and interacts with these groups.

Self-Study, Continued

Demography and Statistics

- Request the statistics for your church (name, location, and pastor's name) for the past 10 years for the Healthy Church Initiative. [Laura Chambers will know what report to send to you.] ***Be sure to include an email for her to send you this report which must be included in your self-study.***

Contact Information

Laura Chambers at the Office of Analysis and Research, General Council of Finance and Administration, The United Methodist Church
email: lchambers@GCFA.org
phone: (615) 369-2396
fax: (615) 369-2394

Laura will send you these categories

- Professions of Faith
- Faith Restored
- Removed by Death
- Professing Membership
- Average Attendance
- Baptisms
- Preparatory Members
- Constituent Members
- Confirmation Class
- Leaders in Christian Formation
- Children in Christian Formation
- Youth in Christian Formation
- Young Adults in Christian Formation
- Adults in Christian Formation
- Total Persons in Christian Formation
- Average Sunday School Attendance
- Covenant Discipleship Group
- Vacation Bible School
- Ongoing Classes other than Sunday School
- Short Term Classes
- Average Attendance – ongoing classes
- Total Expenditures

Self-Study, Continued

Demography and Statistics

1. Estimate the average age of the people participating in the regular activities of your congregation. State how this was determined.
2. State the percentage of people who attend your worship services who also attend some group meeting such as a class, support group, or service team. Count each individual only once.
3. Prepare a list of the number of current members or regular participants who got involved:
 - Prior to 1960
 - From 1961-70
 - From 1971-80
 - From 1981-90
 - From 1991-2000
 - From 2001- Present
4. List the total receipts and total expenditures for each of the last 10 years or for the entire history if founded more recently.
5. Without listing names, state the amount given by each of the top ten contributors of record in the last fiscal year. Total these amounts and state the percentage of giving this total represents in relation to total contributions.
6. State the same information for the second ten contributors of record.
7. State the total number of contributors to the congregation during the last fiscal year and the average amount given per contributor during the last fiscal year.

Continued on next page

Self-Study, Continued

Community Study

1. Write a brief overview of the area and community in which the congregation is located and which the congregation primarily serves.
2. Secure the MissionInsite report for your church (your area) and you can do this by going on the Conference website, www.moumethodist.org, Center for Congregational Excellence, demographics, and type in your area's information. Order the Executive Report (2-5 mile radius) and if you have any trouble contact, TCalcote@moumethodist.org for her help.
3. Briefly describe the square mile that surrounds the primary location of the congregation.

Conduct interviews and gather data in regards to the needs of your community. Conducted by a subgroup of the Leadership Team (board).

- Door to door surveys of neighbors. Share that you have an interest in the people in your church's neighborhood and wonder if there is anything you can do for them. Do they have needs that they might have you can help with? Do they have a church home? If not, what kind of church would they like? Just get to know them and share that you want to serve them in the future. (They may not believe you since you may not have served them in the past.)
- Interviews with Community Officials. Interview the following: police chief, school superintendent or principal, mayor or alderpersons, etc. Ask, what can the church do to help this community most. They will usually be delighted to tell you and talk with you about the community. Bring back the results of your surveys after interviewing four or five community officials. Share the surveys with the rest of the Leadership Team
- Don't forget about other sources of information like the Chamber of Commerce. Any community surveys done recently would be helpful information to obtain. It would also be helpful to talk to any groups that are service oriented to gain insight on community needs.

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Self-Study, Continued

Documents

Please send copies of the following (if you have them):

- Last two charge conference reports
 - Last two annual budgets and full financial statements, for past two fiscal years, as well as the most recent financial report for this current year (YTD). Be sure to include budget versus actual and balance sheets.
 - Sample bulletins, for past four Sundays, and newsletters, past four editions.
 - Any policy statements, or policy manuals
 - Other printed documents you deem helpful in providing insight into your congregation.
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Self-Study Group

After all the self-study information has been compiled, the board/council, and staff need to discuss the following questions:

Give the general consensus of the group; be sure to include the date.

- a) What are the three greatest strengths of this congregation, listed in priority order?
 - b) What are the three most significant weaknesses of your church?
 - c) What three changes would you most like to see made in your church, listed in priority order?
 - d) Do the leaders want this congregation to grow significantly?
 - e) Are the leaders willing to make the difficult decisions required for change and growth?
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Self-Study, Continued

Please fill out the following questionnaire so that the consulting team might know more about your congregation. The material comes from a survey by Bill Easum.

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1. Parking

- _____ a) Average attendance of largest service. (If Sunday School and worship occur at the same hour—count the total number at that time.)
- _____ b) Paved off-street parking spaces available (please count)
- _____ c) 80% of total parking spaces
- _____ d) Number of parking spaces needed. [Divide (a) by 2 and compare to (c).]

2. Small Groups (15 or less people) These groups need to meet at least twice a month—Do not count Sunday School classes.

- _____ a) Number of support / recovery groups.
- _____ b) Nurture groups.
- _____ c) Ministry teams.
- _____ d) Others.
- _____ e) Number needed if you had one group for each 15 or so in worship.

3. Sanctuary (Do not estimate or take data from architect's work – measure actual pew lengths and divide by 22 inches.)

- _____ a) Sanctuary total capacity
- _____ b) 80% of capacity
- _____ c) Average main service attendance

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Self-Study, Continued

4. Nursery

- _____ a) Nursery capacity (30 sq. ft. per child)
- _____ b) 80% of capacity
- _____ c) Average main service attendance
- _____ d) Number needed for 80%
- _____ e) How many personnel at main attendance?
- _____ f) Is there a nursery for all events?
- _____ g) Are infants and toddlers separated?
- _____ h) Are nursery policies given to parents?
- _____ i) Are you currently using Safe Sanctuary guidelines?
- _____ j) Do you have a plan to keep the nursery safe from harm or kidnapping?
- _____ k) What type of check-in system are you using?

5. Sunday Worship

- _____ a) What hours? _____
- _____ b) Do you offer worship other than Sunday morning?
 - a. If so, what day and time? _____
- _____ c) Do you offer worship on another site? If so, where? What day and time?

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Self-Study, Continued

6. Music (What type of music are you using?)

- a) Service time: _____ Choir / Praise band / Other _____
- b) Service time: _____ Choir / Praise band / Other _____
- c) Service time: _____ Choir / Praise band / Other _____

7. Sunday School

- _____ a) Number of adult Sunday School classes.
- _____ b) Average number of youth in Sunday School.
- _____ c) Average number of children in Sunday School.
- _____ d) How often do you start a new adult Sunday School class?
- _____ e) When was the last time you started a new adult class?

8. Are the area public schools growing, stable or declining?

9. What is the percentage of the present debt service (annual mortgage payment) to the annual budget?

10. Signing

- _____ a) Adequate/attractive sign perpendicular to street with worship times to guide first-time visitors?
- _____ b) Clear/attractive signing inside the building to help people find their way? (focused on: nursery, rest rooms, and worship)

11. Are at least 10% of parking spaces designated for first-time guests?

12. Number of pastors over the past 20 years.

13. Estimate the number of adults in worship who are 60 years of age or older. (percentage of total average attendance)

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Self-Study, Continued

14. Paid Staff

- _____ a) Number of full-time staff.
- _____ b) Number of part-time staff.
- _____ c) Number of meetings the pastors attends in a month.

15. First-time Guests

- _____ a) Average number of first-time guest families each week.
- _____ b) Are these families added to church mailing list?
- _____ c) Number of hours between attending service and contact from church.

_____ **16. How many spiritual leaders does the church have?**

_____ **17. How many new leaders are raised up each year?**

- _____ a) Is there an intentional plan in place to do this?

_____ **18. How many people are involved in hands-on ministry each week?**

_____ **19. Has the church had any major conflicts in the past 20 years?**

- _____ a) If so, is the conflict resolved?
- _____ b) Please comment briefly:
