



What's Assessment All About - draft

NOTE: At present, the assessment process and its various tools are being tested in various congregations across the Diocese. This document, therefore, reflects the process as it now stands. Please expect some alterations to take place after this trial run. This document will be revised accordingly...

Fostering the development of healthy congregations...

Shaped by a Living Hope is an initiative that is fostering the development of healthy congregations in the Diocese of Algoma. Addressing the first objective named in the Strategic Plan adopted by Algoma's Synod in 2009, *Shaped by a Living Hope* is responsive to the Mission, Vision and Governing Values we share as a Diocese. Its aspiration is to equip our congregations to live vibrantly today in the light of God's promised tomorrow.



To work toward this outcome, *Shaped by a Living Hope* consists of three interrelated components:

1. Benchmarks for healthy congregations;
2. Workshops, training, consultations and materials prepared for our Diocese, and supportive resources;
3. An assessment process designed to discern the health and sustainability of congregations.

The Benchmarks for Healthy Congregations in Algoma and supportive materials are posted on the Diocesan website under "Ministry Resources – Congregational Development." New resources or resource links are being added or suggested there and/or on our Diocesan Facebook page on a regular basis.

Link to Diocesan website:

www.dioceseofalgoma.com

Link to Facebook page:

<http://www.facebook.com/pages/The-Diocese-of-Algoma-Shaped-by-a-Living-Hope/154286687968052?ref=ts>

This document is provided to give some sense of what is involved and what you can expect in the assessment component of *Shaped by a Living Hope*.

Why are we doing this work?

Discernment is a characteristic practice of the Christian Faith. One way in which *Shaped by a Living Hope* supports the development of vibrant and faithful congregations in Algoma is by exercising this practice through the assessment process called for in our Diocesan Strategic Plan.

The purpose of this component of *Shaped by a Living Hope*, then, is to explore key aspects of each congregation's life in order to better ascertain its current health and sustainability, and to determine how effectively we are forming disciples and engaging in God's mission in local communities throughout Algoma.

To this end, the process will consider the relationship between vitality of ministry and mission, the exercise of characteristic practices belonging to Christian faith, financial sustainability and various matters related to a church's building and facilities.

The process of assessment is designed in such a way as to help congregations, along with Deanery and Diocesan leadership, to...

- support, and promote the development of sustainable congregations
- encourage vibrant worship, deliberate formation for discipleship, and missional service beyond the common life of each congregation;
- make wise, faithful decisions toward the fulfillment of our Diocesan mission;
- move toward the vision we have identified as a Diocese;
- rationalize buildings and resources within the Diocese - particularly to ensure we continue to support our thriving congregations, expand strategic ministries where there are inadequate resources at present, and identify and support

emerging missional opportunities

- live and serve joyfully as signs of God's Kingdom, better reflecting the dignity and destiny that Christ has won for every human being.

Who is involved?

The assessment task will be engaged by each congregation in cooperation with its Deanery Assessment Team (A-Team), supported as necessary by the Diocesan Congregational Development Officer (CDO). The Program Associate (PA) of each deanery will also play a supportive role in this work. While certain individuals of your congregation will be responsible for overseeing the process or performing certain tasks, there are a number of opportunities to involve as many people as possible from your church.

Some of the tools for the assessment process can be found on the Diocesan website. Other materials will be made available from the Synod Office through the CDO (congdevelopment@dioceseofalgoma.com), or by your PA.

The assessment component of *Shaped by a Living Hope* involves active listening, thoughtful observation and enthusiastic encouragement on the part of the CDO, PA and A-Team members. These individuals will also assist your congregation in its work of congregational self-assessment (the largest part of the process) by posing questions, stimulating conversation, introducing resources and evaluative tools, and providing other assistance as needed.

It is anticipated that, from the time of the initial congregational event (step #1 below), the assessment process will take a congregation eight to ten weeks to complete.

What are the stages of the process?

The steps of the assessment process are as follows:

1. Congregational Event: The purpose of this gathering is to introduce the foundational convictions of *Shaped by a Living Hope*, celebrate the ways God has worked and is working in your congregation, begin to identify both signs of hope and areas of concern the congregation may have, and outline briefly the purpose and steps of the assessment process. This evening provides the assessment team and the process leaders in your congregation further insight into the operative values and overall notions of mission/purpose amongst the members of the congregation.

Who participates? As many people from the congregation as possible. (Congregational leaders such as the Incumbent, wardens and advisory board/parish council members should be in attendance.)

Time needed: Two and a half hours. (It is possible to hold more than one event if this better enables widespread participation...)

To prepare for this step:

- Advertise the event(s). Encourage participation as widely as possible. Extend personalized invitations to those who might think “I am sure this doesn’t apply to me” or “I really don’t have anything important to offer.”¹
- Arrange to have light snacks and beverages provided²
- Choose two or three people from the congregation to serve as process leaders for the assessment³
- Arrange to have someone set up the meeting space so people can sit around tables in groups of six
- Make sure your treasurer, envelope secretary

and property coordinator/chairperson are on board (they will be crucial to subsequent steps in the assessment process)

- Have a flip chart (with lots of paper), one marker for each table, masking tape, a projection screen and a PowerPoint projector available and set up where it is easy for all to see.

(If desired or necessary, the CDO and/or PA and/or an A-Team representative can meet with the Incumbent and congregational process leaders



¹ Invite specifically anyone you want to make sure takes part - new parishioners, advisory board members, key individuals that bring energy and insight to your parish’s ministry, teens, etc.

² Food and a relaxed social atmosphere are best suited for the agenda of this congregational event.

³ These individuals will be involved in each step of the process, helping to move it along at your end. You want to ask forward-thinking, imaginative people of faith who “get” the importance of vision and missional posture on the part of a congregation, can provide and appreciate fresh perspective, and are able to be honest and insightful in the assessment of your congregation. You may also want to ensure a balance of newer and long-time members in this role. Often it is best, too, to ask individuals who do not currently hold an office in the congregation.

2. Evaluation Meeting: Shortly after the congregational event, the congregation's Incumbent and leadership team meet with the A-Team facilitators to identify what was learned from the event and organize the remainder of the assessment process. Other members from the congregation, particularly the wardens, treasurer and property coordinator (or the equivalent ministers) are welcome to take part in this meeting, too. At this meeting, a book will be chosen for the third step of the assessment process.⁴

Who participates? Incumbent, congregational process leaders, A-Team facilitators, PA and/or CDO, any interested people, possibly the wardens and/or treasurer and/or property coordinator (or the equivalent ministers)

Time needed: One and a half hours

To prepare for this step: Bring the flip chart sheets from the table group exercises which took place at the congregational event(s).

3. Book Study: Through this study, members of the congregation will consider the ministry and discipleship practices of the congregation, using one of four suggested books coupled with an accompanying study guide as a resource (if applicable). This step will provide a better understanding of the congregation's vitality related to worship, formation, common life, service to the community and world, and practices around Christian Initiation. Therefore, this exercise pays particular attention to the benchmarks related to *Vitality*.

Who participates? Clergy, congregational process leaders, any interested people. (Ideally, other parish leaders will take part, too.)

Time needed: One afternoon and/or evening a week (two hours per session), over four to five weeks. If it helps with participation, the

congregation may decide to run two studies of the chosen book over this period of the assessment process.

To prepare for this step:

- Order books for participants.
- Advertise the series/study. Encourage participation as widely as possible. Extend personalized invitations to those who might think "I am sure this doesn't apply to me" or "I really don't have anything important to offer."

(A similar series for children and youth is being developed so that they, too, may have input into this process.)



⁴ At present, there are four books recommended: *Practicing Our Faith (2nd Edition)* by Dorothy C. Bass, *Christianity for the Rest of Us* by Diana Butler Bass, *Born of Water, Born of Spirit* by Sheryl A. Kujawa-Holbrook and Fredrica Harris Thompsett, and *Small, Strong Congregations* by Kennon Callahan.

4. Reflection on Finances: This stage considers the congregation's finances in light of the previous steps and the Diocesan benchmarks for healthy congregations. It allows a better understanding of how the congregation's financial planning, priorities and resources serve mission and allow for future sustainability.

Who participates? Incumbent, congregational process leaders, treasurer, envelope secretary, (stewardship coordinator), any interested people.

Time needed: One afternoon or evening, plus some preparation time on the part of the treasurer and/or envelope secretary.

To prepare for this step:

- Provide summaries from the book study
- Treasurer and/or envelope secretary gathers information on the number of identifiable givers, annual contributions of individual parishioners from the previous five years, the budget for current year

5. Reflection on Building: This stage considers the congregation's building(s) in light of the previous steps and the Diocesan benchmarks. It allows a better understanding of how well the congregation's facilities and location serve mission and allow for future sustainability. It also provides a method of analyzing the building's environmental impact.

Who participates? Incumbent, congregational process leaders, property coordinator (or equivalent minister), any interested people. You may also choose to invite participation by some individuals unfamiliar with your building.

Time needed: One afternoon or evening. (Plus some preparation time on the part of one or two people.)



To prepare for this step:

- Provide the completed copy of the financial workbook
- Determine the average monthly cost of utilities
- Obtain a copy of the congregation's booking/activity calendar(s), or some analysis of building use
- It would be helpful to one or all of the following: hospitality audit, accessibility audit, worship space audit
- You may also wish to obtain a report from the most recent inspection of your building by deanery officials

6. Other Reviews: Usually, there will be two or three other reviews determined helpful during step #2 above. Depending on the reviews in question, these will be filled out by advisory board/parish council members, other parish leaders and/or any interested members of the congregation

The A-Team members assigned to your congregation will be available to advise or assist in any of the steps above if you require their support or participation at any point. More information on steps 3-6 is available in the related tools/workbooks.

7. Assessment Review: When the above items are completed, your congregation's assessment work will be reviewed by the Incumbent, your process leadership team (and perhaps others involved in the above work), the A-Team facilitators, and sometimes the CDO and/or PA. Following this meeting, the facilitators will provide a summary of the assessment findings, including their own impressions and forward copies of all material to the CDO.

8. Meeting with CDO: The CDO will meet with the Incumbent (and process leaders, if desired) in person, via Skype or by phone about the final assessment. Together they will discern next steps for congregational development and discuss how the findings of the assessment will be communicated with the congregation. The CDO may also request feedback from the Incumbent and process leaders about the assessment process and tools for the benefit of future revision. The CDO will also keep your Territorial

Archdeacon informed of assessment outcomes.

9. Follow-up: If necessary, follow-up resources, consultation or formation/training opportunities will be suggested or provided to the congregation by the CDO and/or PA.



If you have any questions/concerns/comments, please feel free to be in contact with:

The Rev. Dr. Jay Koyle,
Congregational Development Officer
Phone: 705.256.5061, ext. 22
Email: congdevelopment@dioceseofalgoma.com



Congregational Development
The Diocese of Algoma
Anglican (Episcopal) Church of Canada
P.O. Box 1168
Sault Ste. Marie, Ontario
P6A 5N7 Canada
705-256-5061 x22
congdevelopment@dioceseofalgoma.com

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