

FIRST STEP

*An Assessment
Tool for Congregations*

The Episcopal Church Foundation (ECF) empowers Episcopal ministries to live more fully into their mission by discerning what God is calling them to be and do as the Body of Christ known as The Episcopal Church in their own particular time and place.

The **FIRST STEP** assessment tool was created specifically for parishes asking questions such as:

How are we doing? What do we need to know? Where do we begin?

THE PURPOSE IS TO:

- *Help you articulate your challenges and/or growth opportunities as a first step towards prioritizing your needs.*
- *Offer you the opportunity to talk with someone from ECF about next steps.*
- *Share some basic information about your congregation to help our staff prepare for the initial conversation.*
- *Provide you with some (in our follow up) resources for congregational leaders.*

First Step is designed for use by small groups of three or four individuals as part of a collective conversation. This assessment is free and available online and as a downloadable file.

strengthen their strategic, leadership, and/or financial capabilities in practical yet spiritually grounded ways. We welcome the opportunity to get to know you and to be of service to you in your ministry.

The Episcopal Church Foundation (ECF) works with Episcopal congregations, dioceses, and organizations to help

Let's get started!

Identifying Area of Most Need

The Episcopal Church Foundation's resources are grounded in spirituality. Working with congregations, we often find their areas of greatest challenge fall into one of three categories: strategic visioning and thinking, leadership, or financial resources. Please identify the option that best describes the area your congregation finds most challenging today.

If you are facing a challenge that falls outside of areas outlined below, please let us know in Section d.

- a. **Strategic Visioning and Thinking:** *Planning for congregational growth; clarifying a congregation's mission, vision, and overall purpose; developing a strategic approach to planning and decision making, identifying short- and long-term goals, tracking progress on goals, etc. Please proceed to page 3.*
- b. **Leadership:** *Vestry leadership, clergy leadership style, conflict among leaders, decision-making practices, recommended practices for leading leadership teams, volunteer recruitment practices, nomination and election processes, creating group behavioral norms, and accountability, etc. Please proceed to page 7.*
- c. **Financial Resources:** *Basics of parish finances, creating effective annual stewardship campaigns, developing realistic and understandable annual budgets, capital campaigns, planned giving programs, creating an endowment and restructuring endowment policies, etc. Please proceed to page 10.*
- d. **Other:** *You will have an opportunity to describe this in more detail in the next section. Please proceed to page 14.*

"A simple man believes anything, but a prudent man gives thought to his steps"
— Proverbs 14:15

Strategic Visioning & Thinking

Please tell us more about the strategic visioning and thinking needs in your congregation. If you'd rather skip the survey and instead talk with a representative from ECF, please call us at 1-800-697-2858; if no one is immediately available, we'll ask for your contact information as well as the best time for us to schedule a phone conversation within the week.

1. You identified assistance with strategic visioning and thinking as your congregation's primary area of need. Please tell us more about your strategic visioning and thinking needs.

2. On a scale of 1-5, does your church have a clearly articulated and widely embraced mission and vision statement?

0 - No mission statement

1 - Poorly articulated or embraced

2 - Unsatisfactorily articulated or embraced

3 - No feeling

4 - Satisfactorily articulated and embraced

5 - Well articulated and embraced

3. Does your church use this mission and vision statement as a guide for planning and decision making from a strategic perspective?

Yes

No

Other (please specify)

4. Are there programs/activities/fundraisers that are beyond the scope of your current mission?

Yes

No

Other (please specify)

5. Are the programs/activities/fundraisers referenced in question 4 having a negative effect on your key volunteers?

Yes

No

Other (please specify)

6. Is your congregation engaged in ministries designed to meet community needs?
 Yes No Other (please specify) _____
-
7. The level of conflict in our congregation is best described as:
 Little or no conflict: people practice avoidance techniques Passive-aggressive: conflict quietly undermines our ability to act
 Healthy and normal: we resolve our differences in positive ways Open conflict: we are clearly divided with regard to some important issues.
8. Does your congregation have full-time, part-time, or no paid clergy person?
 More than one full-time clergy person One part-time clergy person
 One full-time clergy person No paid clergy person
 One full-time and one or more part-time clergy persons Supply clergy only
 Multiple part-time clergy persons Do not know
 Other (please specify) _____
9. What is the range of your congregation's annual operating budget?
 Under \$50,000 \$500,000-\$799,00
 \$50,000-\$149,000 Over \$800,000
 \$150,000-\$349,000 Do not know
 \$350,000-\$499,000 Other (please specify) _____
10. Which choice best describes your parish's setting?
 Downtown or center of a large city Larger town or a small city
 Older residential area of a large city Village or small town
 Older suburb of a large city Rural area or open country
 Newer suburb around a large city Other (please specify) _____
11. How would you describe your congregation?
 One predominant racial or ethnic group; one congregation
 Two or more distinct racial or ethnic groups and congregations
 Two or more distinct racial or ethnic groups who have formed one congregation
 Other (please specify) _____
12. Is your congregation's membership growing, declining, or remaining the same?
 Growing
 Declining
 Remaining the same
 Other (please specify) _____

13. What percentage of your church's operating budget is funded by individual contributions?

75% or more

Less than 50%

50-74%

Other (please specify) _____

14. Please tell us about your role in the congregation. If filling out as a group, please check all that apply.

Clergy

Lay leader(s)

Parish employee(s)

Other (please specify) _____

Your Contact Information

Thank you for completing the assessment tool. We encourage you to provide the following contact information so that we can stay in touch to learn more about your congregation and provide you with additional resources, tools and information.

15. *Name:* _____

Church or Organization Name: _____

City, State: _____

Email Address: _____

Phone Number: _____

16. Would you like for us to follow up by phone?

17. We would love to hear from you about your experience with ECF First Step. Is there anything we should know?

*“Remember your leaders, who spoke the word of God to you.
Consider the outcome of their way of life and imitate their faith.”
— Hebrews 3:7*

Leadership Resources

Please tell us more about your congregation’s leadership needs. If you’d rather skip the survey and instead talk with a representative from ECF, please call us at 1-800-697-2858; if no one is immediately available, we’ll ask for your contact information as well as the best time for us to schedule a phone conversation within the week.

1. You identified assistance with leadership as your congregation’s primary area of need. Please describe the areas of leadership that are challenging for your congregation.

2. Does your vestry or mission committee have established behavioral norms? This is oftentimes called a vestry covenant.

Yes *No* *Other (please specify)* _____

3. Does your vestry or mission committee understand and embrace its purpose?

Yes *No* *Other (please specify)* _____

4. Do you feel your congregation’s lay and clergy leadership teams are effective?

Yes *No* *Other (please specify)* _____

5. Is there unresolved conflict over leadership issues (including leadership styles, major disagreements among leadership)?

Yes *No* *Other (please specify)* _____

6. Which response best describes the decision-making style of your congregation's leadership team?

- Strives to build consensus*
 - Clergy, warden, or other leaders make(s) decisions unilaterally*
 - Other (please specify)* _____
-

7. Does your congregation have full-time, part-time, or no paid clergy person?

- More than one full-time clergy person*
- One full-time clergy person*
- One full-time and one or more part-time clergy persons*
- Multiple part-time clergy persons*
- One part-time clergy person*
- No paid clergy person*
- Supply clergy only*
- Do not know*
- Other (please specify)* _____

8. What is the range of your congregation's annual operating budget?

- Under \$50,000*
- \$50,000-\$149,000*
- \$150,000-\$349,000*
- \$350,000-\$499,000*
- \$500,000-\$799,000*
- Over \$800,000*
- Do not know*
- Other (please specify)* _____

9. Which choice best describes your parish's setting?

- Downtown or center of a large city*
- Older residential area of a large city*
- Older suburb of a large city*
- Newer suburb around a large city*
- Larger town or a small city*
- Village or small town*
- Rural area or open country*
- Other (please specify)* _____

10. How would you describe your congregation?

- One predominant racial or ethnic group; one congregation*
 - Two or more distinct racial or ethnic groups and congregations*
 - Two or more distinct racial or ethnic groups who have formed one congregation*
 - Other (please specify)* _____
-

11. Is your congregation's membership growing, declining, or remaining the same?

- Growing*
- Declining*
- Remaining the same*
- Other (please specify)* _____

12. What percentage of your church's operating budget is funded by individual contributions?

- 75% or more*
- 50-74%*
- Less than 50%*
- Other (please specify)* _____

Your Contact Information

Thank you for completing the assessment tool. We encourage you to provide the following contact information so that we can stay in touch to learn more about your congregation and provide you with additional resources, tools and information.

13. *Name:* _____

Church or Organization Name: _____

City, State: _____

Email Address: _____

Phone Number: _____

14. Would you like for us to follow up by phone?

15. We would love to hear from you about your experience with ECF First Step. Is there anything we should know?

“Suppose one of you wants to build a tower. Won’t you first sit down and estimate the cost to see if you have enough money to complete it?”
—Luke 14:28

Financial Resources

Please tell us more about your congregation’s financial resource needs. If you’d rather skip the survey and instead talk with a representative from ECF, please call us at 1-800-697-2858; if no one is immediately available, we’ll ask for your contact information as well as the best time for us to schedule a phone conversation within the week.

1. You identified assistance with financial resources as your congregation’s primary area of need. Please tell us why you chose this area as the greatest challenge your congregation is facing.

2. How comfortable is your congregation with your present financial situation?

<input type="checkbox"/> <i>Very comfortable</i>	<input type="checkbox"/> <i>Very uncomfortable or anxious</i>
<input type="checkbox"/> <i>Somewhat comfortable</i>	<input type="checkbox"/> <i>Unsure of congregation’s comfort level</i>
<input type="checkbox"/> <i>Somewhat uncomfortable or anxious</i>	<input type="checkbox"/> <i>Other (please specify)</i> _____

3. Is your clergy leadership comfortable speaking about stewardship and money from the pulpit?

Yes *No* *Other (please specify)* _____

4. Are annual pledges tracked, updated, and acknowledged?

Yes *No* *Other (please specify)* _____

5. Are church finances available and transparent to the congregation?

Yes *No* *Other (please specify)* _____

6. Is leadership perceived to have financial integrity and accountability?

Yes *No* *Other (please specify)* _____

15. Do you have vestry approved gift acceptance policies in place to receive planned or other gifts?

- Yes No Other (please specify) _____
-

16. Does your congregation have full-time, part-time, or no paid clergy person?

- | | |
|---|---|
| <input type="checkbox"/> More than one full-time clergy person | <input type="checkbox"/> One part-time clergy person |
| <input type="checkbox"/> One full-time clergy person | <input type="checkbox"/> No paid clergy person |
| <input type="checkbox"/> One full-time and one or more part-time clergy persons | <input type="checkbox"/> Supply clergy only |
| <input type="checkbox"/> Multiple part-time clergy persons | <input type="checkbox"/> Do not know |
| | <input type="checkbox"/> Other (please specify) _____ |

17. What is the range of your congregation's annual operating budget?

- | | |
|--|---|
| <input type="checkbox"/> Under \$50,000 | <input type="checkbox"/> \$500,000-\$799,000 |
| <input type="checkbox"/> \$50,000-\$149,000 | <input type="checkbox"/> Over \$800,000 |
| <input type="checkbox"/> \$150,000-\$349,000 | <input type="checkbox"/> Do not know |
| <input type="checkbox"/> \$350,000-\$499,000 | <input type="checkbox"/> Other (please specify) _____ |

18. Which choice best describes your parish's setting?

- | | |
|---|---|
| <input type="checkbox"/> Downtown or center of a large city | <input type="checkbox"/> Larger town or a small city |
| <input type="checkbox"/> Older residential area of a large city | <input type="checkbox"/> Village or small town |
| <input type="checkbox"/> Older suburb of a large city | <input type="checkbox"/> Rural area or open country |
| <input type="checkbox"/> Newer suburb around a large city | <input type="checkbox"/> Other (please specify) _____ |

19. How would you describe your congregation?

- One predominant racial or ethnic group; one congregation
- Two or more distinct racial or ethnic groups and congregations
- Two or more distinct racial or ethnic groups who have formed one congregation
- Other (please specify) _____

20. Is your congregation's membership growing, declining, or remaining the same?

- | | |
|------------------------------------|---|
| <input type="checkbox"/> Growing | <input type="checkbox"/> Remaining the same |
| <input type="checkbox"/> Declining | <input type="checkbox"/> Other (please specify) _____ |

21. What percentage of your church's operating budget is funded by individual contributions?

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> 75% or more | <input type="checkbox"/> Less than 50% |
| <input type="checkbox"/> 50-74% | <input type="checkbox"/> Other (please specify) _____ |

Your Contact Information

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22. *Name:* _____

Church or Organization Name: _____

City, State: _____

Email Address: _____

Phone Number: _____

23. Would you like for us to follow up by phone?

24. We would love to hear from you about your experience with ECF First Step. Is there anything we should know?

Other

Please tell us more about your congregation's needs. If you'd rather skip the survey and instead talk with a representative from ECF, please call us at 1-800-697-2858; if no one is immediately available, we'll ask for your contact information as well as the best time for us to schedule a phone conversation within the week.

1. Please tell us about the most pressing need your congregation is facing.

2. Does your congregation have full-time, part-time, or no paid clergy person?

- | | |
|--|--|
| <input type="checkbox"/> <i>More than one full-time clergy person</i> | <input type="checkbox"/> <i>One part-time clergy person</i> |
| <input type="checkbox"/> <i>One full-time clergy person</i> | <input type="checkbox"/> <i>No paid clergy person</i> |
| <input type="checkbox"/> <i>One full-time and one or more part-time clergy persons</i> | <input type="checkbox"/> <i>Supply clergy only</i> |
| <input type="checkbox"/> <i>Multiple part-time clergy persons</i> | <input type="checkbox"/> <i>Do not know</i> |
| | <input type="checkbox"/> <i>Other (please specify) _____</i> |

3. What is the range of your congregation's annual operating budget?

- | | |
|---|--|
| <input type="checkbox"/> <i>Under \$50,000</i> | <input type="checkbox"/> <i>\$500,000-\$499,000</i> |
| <input type="checkbox"/> <i>\$50,000-\$149,000</i> | <input type="checkbox"/> <i>Over \$800,000</i> |
| <input type="checkbox"/> <i>\$150,000-\$349,000</i> | <input type="checkbox"/> <i>Do not know</i> |
| <input type="checkbox"/> <i>\$350,000-\$499,000</i> | <input type="checkbox"/> <i>Other (please specify) _____</i> |

4. Which choice best describes your parish's setting?

- | | |
|--|--|
| <input type="checkbox"/> <i>Downtown or center of a large city</i> | <input type="checkbox"/> <i>Larger town or a small city</i> |
| <input type="checkbox"/> <i>Older residential area of a large city</i> | <input type="checkbox"/> <i>Village or small town</i> |
| <input type="checkbox"/> <i>Older suburb of a large city</i> | <input type="checkbox"/> <i>Rural area or open country</i> |
| <input type="checkbox"/> <i>Newer suburb around a large city</i> | <input type="checkbox"/> <i>Other (please specify) _____</i> |

5. How would you describe your congregation?
- One predominant racial or ethnic group; one congregation*
 - Two or more distinct racial or ethnic groups and congregations*
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Church or Organization Name: _____

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9. Would you like for us to follow up by phone?

10. We would love to hear from you about your experience with ECF First Step. Is there anything we should know?
