

# **FORWARD** **FOCUS**

## **Participant's Guide**

**“Is there faith?**

**Are there gifts?**

**Is there fruit?”**

— John Wesley



South Carolina Conference

# Acknowledgements

This document was initially developed by an unknown United Methodist conference as a process for working through Paragraph 213 in The Book of Discipline of The United Methodist Church, which deals with congregational viability.

The West Michigan Conference, under the guidance of the Rev. Gary Stepp, adapted the above and created a version in support of their Vital Congregation Initiative.

Using the West Michigan document, with permission, the Rev. Mike Selleck and others in the North Georgia Conference crafted a version focused on a different aspect of Paragraph 213, guiding a church in a self-reflective study for vitality, rather than viability.

Under the leadership of the Rev. Kathy James, director of Connectional Ministries for the South Carolina Conference, the Congregational Specialists made further changes to the North Georgia document to accommodate our context and keep the focus on vitality.

We extend our appreciation to all involved over the years for their work and for their permission to draw from previous edits.



## Connectional Ministries

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# The Purpose of This Process

This document outlines a process that is meant to guide your local church leadership team in gathering the information necessary to reflect on the ministry potential and vitality of your church. The process here draws extensively on The Book of Discipline, which asserts that this discovery process may be requested by a local church or initiated at the recommendation of the District Superintendent.

## **The mission of the local church is:**

*"...to make (new) disciples of Jesus Christ for the transformation of (your community and) the world."*

– Paragraph 120, The Book of Discipline of the United Methodist Church

## **"The Function of the local church..."**

*"...under the guidance of the Holy Spirit is to help people to accept and confess Jesus Christ as Lord and Savior and to live their daily lives in light of their relationship with God. Therefore, the local church is to minister to persons in the community where the church is located, to provide appropriate training and nurture to all, to cooperate in ministry with other local churches, to defend God's creation and live as an ecologically responsible community, and to participate in the worldwide mission of the church, as minimal expectations of an authentic church."*

– Paragraph 202, The Book of Discipline of the United Methodist Church

## **A Process for Study and Discernment of Local Church Potential**

*"Since every church is located in a community in some type of transition, every local church is encouraged to study their congregation's potential. Upon the request of the congregation, the District Superintendent shall appoint a study task force to assist in an extensive study of the past, present and potential ministry of that local church. Alternatively, the District Superintendent may appoint such a task force when the future viability of the congregation is in question or whenever he or she deems it necessary for other reasons."*

– Paragraph 213, The Book of Discipline of the United Methodist Church

## **Review Charge**

The South Carolina Annual Conference offers this process as a resource in supporting your church as you participate in this study of "ministry potential and vitality" in accordance with Paragraph 213 in The Book of Discipline. Healthy congregations are keenly aware of the changing culture of the community around them and seek continually to adjust current ministries and develop new ministries in an effort to connect with and ultimately transform their community for Christ. This process is designed to help the church and the district make strategic decisions with regard to how to most effectively align their resources to make disciples of Jesus Christ for the transformation of the world.

# Key Participants in This Process

**Prayer Team(s):** This process will be greatly improved if first and continuously covered in prayer. Consider pulling together those persons, groups and classes that would be willing to keep this process, the team members, the church and community in prayers. Ideally, the Prayer Team(s) would begin undergirding the process with prayer as quickly as possible after the congregation commits to being a part of the process.

**Forward Team:** The identified group from the congregation that carries out the needed tasks between the Congregational Meetings. The Forward Team is designated to do the work of completing the worksheets, analyzing the findings, and compiling and presenting a report to those attending the Congregational Meetings.

- The Forward Team is selected by the Pastor in collaboration with the conference designated “Forward Leader.”
- Forward Team meetings take place between the scheduled Congregational Meetings as often as needed. Consistent attendance by members of the Forward Team is expected.
- Tasks of the Forward Team could include:
  - Identifying, preparing and analyzing the required data needed to complete the included worksheets.
  - Providing basic analysis of the gathered data
  - Effectively and creatively reporting the findings and analysis with the entire congregation at the Congregational Meetings.

**Forward Leader:** A specifically trained individual or pair assigned by the District Superintendent to offer guidance and instruction to the Forward Team in your congregation as to how to compile, analyze and report the gathered information that is required. The Forward Leader will be in the background equipping, encouraging and supporting the Forward Team, but the Forward Team will be tasked with completing the work.

**Congregational Meetings:** Occasions that are open for the entire church to attend. They are a dynamic part of the overall holy process.

# Creating Your Forward Team

The Pastor, in collaboration with the Forward Leader, identifies and recruits a local church Forward Team to engage in this process, provide required data, and complete the included worksheets in the given sequence. The size of the team is flexible. It should be large enough to handle the work in a timely manner, yet not so large that meetings become difficult to schedule. Each congregation needs to determine what its ideal number will be, but the recommended size of the team is 8-15 persons representing a cross-section of the entire congregation as much as possible. Once the team is identified and team members agree to serve on the Forward Team, the makeup of the Forward Team must be approved by the Church Council or similar governing body.

Identifying the most appropriate persons for this work is critical. To be clear, this is a working group, not a policy-making group. Each task, as outlined in the included worksheets, would benefit greatly by having a willing and curious person to perform the research and preparation necessary for presenting the material during Congregational Meetings.

Some general characteristics that indicate that a person would be a fit for the Forward Team are:

- Naturally, highly relational.
- Tends to naturally see the big picture.
- Comfortable researching old conference journals for attendance and other membership data.
- Familiar with computers and analysis of data to work with the demographic data.
- Familiar with the church's financial data including formats, spreadsheets and analysis.
- Familiar with the history of the church.
- Can create presentations, such as PowerPoint or similar.
- Can speak to groups easily and clearly.
- Familiar and connected to the community to help in gathering data.

The Forward Team is the working end of this process – gathering data, providing basic analysis, and creating a way to effectively share the findings with the other members of their congregation. The strength of this process lies in trusted members speaking with other members about the realities they have discovered for themselves. There is significant loss of confidence and believability when an outsider provides all the data and interpretation. Additionally, this method leaves an experienced and knowledgeable group in play at the church to keep conversations vital and real, well into the future – long after the conference coaches have moved on.

It is generally understood, though not a mandate, that the Pastor will function as the convener of the Forward Team. If a chairperson is deemed helpful to keep things moving and in order, one may be designated by the team members.

**The Forward Leader is not the presenter for the Congregational Meetings, unless specified. The Forward Leader keeps things on point in a constructive and helpful manner, only as needed.**

## **Communication**

The Pastor and Forward Team should regularly keep the congregation aware that the Forward Focus process is alive and well. Over-communicating is better than under-communicating. Possible methods for communications include:

- Brief updates in worship that are positive and hope filled.
- Announcement sheets that can be read in Sunday school classes.
- Updates through email and news postings to the church constituency.
- Publicize Congregational Meeting dates and invite folks to attend and listen.
- Announce Congregational Meetings at all administrative meetings.
- Regular updates given to the Church Council or other meetings of church governing bodies.

**This process will not be as effective if it is experienced as something imposed from a small group, seemingly from out of the blue sky.**

**As many folks as possible need to be fully aware that this process is real and that significant adjustments and improvements might be coming.**

**The degree of pushback, anger and frustration is in direct ratio to the element of surprise.**

**The entire congregation  
- members, leaders and constituency -  
must know this is happening and that it is  
important, urgent and determinative.**

# Timeline for the Process

The Forward Focus process is designed to be completed in three to four months – from the Forward Team’s first meeting to the final reporting to the congregation. This is dependent on scheduling issues, ease of obtaining data, time to reflect on the data, and creation of the reports.

There is risk in trying to do this too quickly. The data has to be gathered, conversations and meetings held, reports made, and presentations reviewed. This takes time and should be accommodated as necessary.

There is also risk in doing this too slowly. People’s lives and schedules change rapidly. The more time that passes in any process usually means fewer people can stick with the project. Pastors may move. Key leaders may change careers. Members who know what is happening move away, and new ones who don’t move in.

As time passes and the Forward Team shrinks, there is a temptation to offload the project to a committee, which prolongs the work even more. All of these issues increase the likelihood that little or no congregational energy remains to engage recommendations.

Regularly scheduled congregational meetings provide for a systematic and paced study of the congregation’s past, present and potential for ministry. In addition, regularly scheduled gatherings create a layer of accountability for the Forward Team to complete all tasks in a timely manner.

The suggested timeframe for this process allows for three to four weeks between each of the five steps. Whatever pace you choose, carefully and intentionally keep this process moving forward in such a way that the work can be done and done well, and so the results can be shared in a reasonable amount of time.

# Congregational Meetings

## All congregational meetings are open.

To insure transparency throughout the process, leaders, congregation members and other interested parties may attend. The Forward Team is encouraged to make communication of the Forward Focus process a priority in the congregation.

Not everyone who attends the church shares the same degree of concern for how things are done or run, but they might like to know what is happening among those who do have that level of concern. Keep them informed even if they don't seem interested in joining in on the work and discussions.

Congregational meetings are attended by one or two conference-endorsed Forward Leaders in consultation with the District Superintendent. The content presented at the meetings is provided entirely by Forward Team members as they share what has been learned by completing and studying the worksheets as assigned.

Forward Team meetings that convene between the Congregational Meetings are when the worksheets are processed and data is gathered, studied and crafted into a presentable form.

## Preparing for Congregational Meetings

*Here are some helpful tips to consider as you prepare for each Congregational Meeting:*

- The beginning of each Congregational Meeting is important and should set a faith framework. Consider beginning with a worship component:
  - Sing a hymn or a praise chorus.
  - Light a candle to invoke the Holy Spirit.
  - Pray.
  - Some combination of these.
- Promotion and encouragement to participate in the Congregational Meetings should be evident and frequent throughout the church.
- Make your Congregational Meetings excellent with careful thought to:
  - Hospitality
  - Set-up
  - Sound and video
- The extra effort will help attendees sense the importance of what is going on.

# Congregational Meeting #1

## Preparation for Congregational Meeting #1

Once the Forward Team is chosen and prior to Congregational Meeting #1, the Pastor will call the first meeting of the Forward Team with the Forward Leader to accomplish the following:

- Introduce team members and Forward Leader to each other.
- Introduce the team to the process.
- Set the timeline for the process.
- Share expectations of the Forward Team members.
- Commit to and sign the Forward Team covenant.

## Agenda for Congregational Meeting #1

*(Forward Leader leads this session except for devotional by a Forward Team member)*

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

- Open with a form of worshipfulness as a way to orient the session as a spiritual time.
- The Forward Leader introduces and reviews the entire process and answers questions. *(Use [Forward Focus Introduction PowerPoint Presentation.](#))*
- Forward Leader discusses the task of completing the Spiritual Mapping exercise *(Worksheet 1, Participant's Guide Pages 20-21).*
- Review the Life Cycle of a Church *(Participant's Guide Pages 28-29).* Solicit congregational input about where they think they are in the church life cycle and what that means to them. Record on newsprint for future reference.

## Notes

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# Congregational Meeting #2

## Preparation for Congregational Meeting #2

Forward Team organizes to complete Worksheets 1-3 (*Participant's Guide Pages 20-23*). Consider various ways to include others from the church to broaden the conversation. Create a full PowerPoint presentation regarding what the team has learned and implications at this point in the process. Make sure the presentation that informs and engages those attending Congregational Meeting #2.

## Agenda for Congregational Meeting #2

**Agenda** (*Forward Leader leads this session except for devotional by a Forward Team member*)

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

- Open with a form of worshipfulness as a way to orient the session as a spiritual time.
- Team shares what was learned from Worksheet 1 (The Spiritual Mapping tasks).
- Team shares what was learned from Worksheet 2 (The Evaluation of Ministry and Identity of the Church).
- Team shares what was learned from Worksheet 3 (The Area of Influence and Potential for Ministry and Mission Report).
- Solicit congregational input and record it on newsprint for future reference.

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# Congregational Meeting #3

## Preparation for Congregational Meeting #3

Forward Team prepares and completes Worksheets 4-5 (*Participant's Guide Pages 24-25*). Create a full PowerPoint presentation regarding what the team has learned and implications at this point in the process. Make sure the presentation that informs and engages those attending Congregational Meeting #3. Read and prepare information to share regarding "The Change Curve" (*Participant's Guide Pages 32-33*).

## Agenda for Congregational Meeting #3

**Agenda** (*Forward Leader leads this session except for devotional by a Forward Team member*)

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

- Open with a form of worshipfulness as a way to orient the session as a spiritual time.
- Team shares what was learned from Worksheet 4 (The Evaluation of Finances and Facilities).
- Team shares what was learned from Worksheet 5 (The Evaluation of Ministry Study).
- Forward Leader leads learning session on dealing with change, sharing information about "The Change Curve" (*Participant's Guide Pages 32-33*), to help in the process of discernment.
- Solicit congregational input and record it on newsprint for future reference.

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# Congregational Meeting #4

## Preparation for Congregational Meeting #4

Finishing the Forward Focus process is also a beginning, as the work of this process naturally leaves the congregation asking, “So what?” or, “What’s next?” The final Congregational Meeting, for that reason, naturally brings about a decision point for the congregation.

With that in mind, prior to Congregational Meeting #4, the Forward Team should meet with the Forward Leader, the District Superintendent, and the Congregational Specialist to explore, consider and decide the recommended next steps for the congregation (*Participant’s Guide Page 17*).

Prior to the meeting, all participants should enter into a time of spiritual discernment, earnestly seeking what and where God might be moving them for next steps. It is critical that those involved on the Forward Team, supported by the congregation, seek discernment from God through daily prayer and silent meditation to listen for where God may be leading.

The outcome of this meeting would be a recommendation to the Church Council, suggesting the next steps for the church. The Forward Team composes one final report of conclusions and recommended next steps based on the information, data and insights from Worksheets 1-5. This team meeting will benefit from having the Forward Leader present to listen, discuss and suggest ideas and possibilities to consider.

## Agenda for Congregational Meeting #4

**Agenda** (*Forward Leader leads this session except for devotional by a Forward Team member*)

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

- Open with a form of worshipfulness as a way to orient the session as a spiritual time.
- Forward Team presents its final report recapping Worksheets 1-5, including recommended next steps. District Superintendent and Forward Leader will be present to share implications and discuss opportunities that are shared in the report.
- Once Forward Team has presented the information and recommendations, Forward Team will answer questions that might arise.
- Once all questions are addressed, Forward Leader will test those gathered for consensus.
- Distribute paper and pencils to the congregation.
- Congregation members write down their responses (1, 2, 3 or 4) and turn it in.
- Results are quickly tabulated.
- If there are no “4” responses, consensus has been reached, and no further action is necessary. Even one “4” response means you do not have consensus.
- Give those who responded “3” or “4” an opportunity to share their concerns.



# Congregational Meeting #5

*(If necessary)*

## Preparation for Congregational Meeting #5

If consensus cannot be reached in Congregational Meeting #4, the Forward Leader, Forward Team and Church Council meet to prayerfully further explore, consider and decide the recommended next steps for the congregation (*Participant's Guide Page 17*).

Prior to Congregational Meeting #5, all participants should enter into a time of spiritual discernment, earnestly seeking what and where God might be moving them for next steps. It is critical that those involved on the Forward Team, supported by the congregation, seek discernment from God through daily prayer and silent meditation to listen for where God may be leading.

The outcome of this meeting would be a recommendation to the Church Council, suggesting the next steps for the church.

## Agenda for Congregational Meeting #5

**Agenda** (*Forward Leader leads this session except for devotional by a Forward Team member*)

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

- Open with a form of worshipfulness as a way to orient the session as a spiritual time.
- Forward Leader reminds participants about the consensus model of decision-making, including the four responses to the recommendations.
- A PowerPoint presentation, which contains the recommendations of the Forward Team and Church Council, is shown to the congregation.
- Forward Leader tests for consensus using the same method as in Congregational Meeting #4.
- If no consensus is reached, continue to refine the recommendations until consensus is reached.
- If emotions get too intense, pause for prayer.
- If emotions continue to persist, adjourn the meeting and schedule a meeting at another time, giving emotions a chance to subside.
- Final results are most effective when consensus is reached.



# Potential Next Steps

Much like God has created every individual human as a unique individual, each local congregation is unique in its gifts, strengths, struggles and context. As you complete the Forward Focus process, you have undoubtedly uncovered the unique makeup of your local congregation, as well as that of your surrounding community. You now have a clear picture of where you are as a congregation. Because each church will discover its unique identity, it is impossible to fully predict what the next steps might be upon completion of the Forward Focus process.

Upon completion of the assessment, the Forward Team – in consultation with the Forward Leader, Pastor, Congregational Specialist and/or District Superintendent – will identify the most effective next steps for the congregation. Potential next steps might include, but are not limited to:

- Intentional Visioning Process to develop goals and a Ministry Action Plan that might include:
  - Options for serving the community with nurture, outreach and witness ministries:
    - As an organized church
    - In cooperative parish ministries, or
    - In shared ecumenical ministries
- Discernment
- Relocation
- Redevelopment
- Revitalization
- Discontinuance
- Nothing
- Other

## **Regardless of the Forward Focus that is discerned...**

...this self-assessment process is about the members of the congregation themselves taking an honest, realistic look at their church life together by researching contributing factors and current assets and focus of the church, evaluating and recommending corrective actions, and calling on God for help. The outcome of this process is a clear picture of the current situation of the local church that will lead to next steps that will help you become more vital in ministry!



# **FORWARD** **FOCUS**

## Forward Team Worksheets

# Worksheet 1

## Spiritual Mapping

*"Many people have set out to write accounts about the events that have been fulfilled among us. They used the eyewitness reports circulating among us from the early disciples. Having carefully investigated everything from the beginning, I also have decided to write a careful account for you, most honorable Theophilus, so you can be certain of the truth of everything you were taught." – Luke 1:1-4*

### Part I – Spiritual Timeline Exercise for the Congregation

Create a timeline of significant events in the life of this church from the collective memory of the team members. Include all the high moments as well as the low ones. Record reflections chronologically.

#### Timeline Questions

- What trends do you see as you look at the history of our church?
- Where are the identifiable turning points, (moments/decisions/events) through which the direction of our congregational life changed dramatically?
- What are demonstrated values of our congregation, the things we do well, often, and which give us joy?
- Where are the identifiable groupings of focus and gaps in the timeline? What do these gaps tell us?

### Part II – Focus Groups and Discussion

We recommend the congregation lead these focus groups as small groups. Use small groups that already meet, such as Sunday school classes, Bible studies, choir, etc., as well as creating one-time focus/coffee groups, if helpful, to gather information from others who may not currently be connected to a small group.

These groups should be led by members of the Forward Team who can be objective and are good listeners, and they may refer to the findings from the Spiritual Timeline as a way to initiate conversation, if that is helpful.

Try to involve as many groups as possible but a minimum might be your worship attendance divided by 8 as a mathematical gauge. (*Example: 100 worshippers/8 = approximately 12 groups*). The survey questions should include:

#### Focus Group Questions

- What are our congregation's strengths?
- What are our congregation's challenges?
- What are the future opportunities for our congregation?
- Where do you see the future of our congregation?
- What previous conversations has this church had about its future?

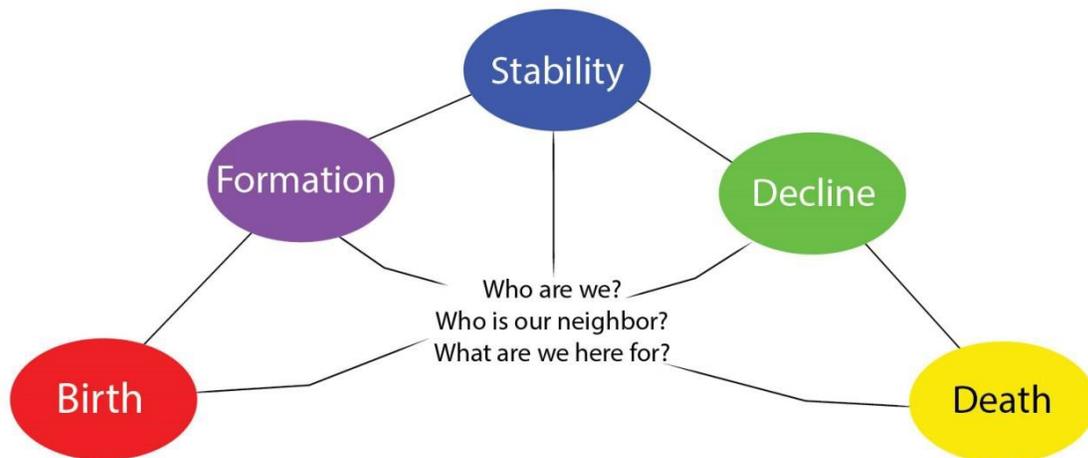
### Part III – The Life Cycle of a Church

The Forward Leader will teach the group about the Life Cycle of the Church. As a group, discuss the following questions to gather an understanding of the implications of where your church finds itself on the life cycle.

Be prepared to share your understanding of the reality of where you as a group see your church in the life cycle at the church gathering.

#### Life Cycle Questions

- Where is your congregation on the church life cycle?
- What can happen for your church to have a point of inflection?
- How might your congregation begin to ask the three questions?
- What action steps can you take to begin the conversation?



# Worksheet 2

## Ministry and Identity of the Church

*"Now Jesus came into the district of Caesarea Philippi, he asked his disciples, 'Who do people say that the Son of Man is?' And they said, 'Some say John the Baptist, but others Elijah, and still others Jeremiah or one of the prophets.' He said to them, 'But who do you say that I am?' Simon Peter answered, 'You are the Messiah, the Son of the Living God.'" – Matthew 16:13-16*

As a United Methodist church, the mission is firm:  
Making disciples of Jesus Christ for the transformation of the world.

- Does your church have a vision statement? If so, what is it?
- List how your church lives out the mission statement of the UMC.
- List how your church lives out your congregational vision statement.
- How are the mission and vision communicated to your congregation and the community?
- How do you understand your uniqueness as a local church? What are you known for in this community?
- List your church's current ministries of nurture, outreach and witness.
- List former ministries of the congregation (ministries that you are no longer doing).
- How many active leaders are in the church? What is each leader's role?
- What is the style of leadership in your church?
- Develop and attach a summary report of your average membership for each of the past 10 years.
- Develop and attach a summary report of your average worship attendance for each of the past 10 years.
- What is the current average age of your active worshipping congregation?
- How many professions of faith have there been over each of the past 10 years?
- What have been significant changes in the past 10 years?
- List other issues that might impact your church's ability to fulfill the mission of the church as stated in Paragraph 202 of The Book of Discipline of the United Methodist Church (*Participant's Guide Page 4*).

### Leadership Styles

**Visionary** – This style is most appropriate when an organization needs a new direction.

**Coaching** – This one-on-one style focuses on developing individuals.

**Affiliative** – This style emphasizes the importance of teamwork and creates harmony in a group by connecting people to each other.

**Democratic** – This style draws on people's knowledge and skills and creates a group commitment to the resulting goals.

**Pacesetting** – In this style, the leader sets high standards for performance.

**Commanding** – This is the classic model of "military" style leadership – probably the most often used but the least often effective.

# Worksheet 3

## *Area of Influence and Potential for Ministry*

*"Do you not say, 'Four months more, then comes the harvest'? But I tell you, look around you and see how the fields are ripe for harvesting." – John 4:35*

Secure the MissionInsite report for your church/your community. You may do this by going to [missioninsite.com](http://missioninsite.com), click on "Register" and follow the directions.

For rural areas, generate a travel polygon for a 12-minute drive from your church. For urban areas, generate a travel polygon for a 10-minute walk and a 7-minute drive, and for suburban areas, generate a 10-minute drive from the church. You can ask for assistance from the office of Congregational Development. Using your travel polygon, generate an ExecutiveInsite Report that looks at 12 key factors about your area. An ExecutiveInsite Report worksheet is available to guide your discussions.

Answer these questions:

- What other United Methodist Churches are within your travel polygon?
- What other (non-UMC) churches are in your community? You will need to identify these on your own as the MissionInsite report will not show this.
  - Denomination?
  - Size?
  - Distance?
- In which school district(s) does your church reside? What is the percentage of free and reduced-price lunch in the schools?
- What are the political jurisdictions in which your church sits?
  - City?
  - Township?
  - County?
  - State?
- What significant community organizations are in your area? (food banks, treatment centers, homeless shelters, youth centers, retirement communities, etc.)
- List other geographically defined areas (neighborhoods, housing projects, etc.)
- What are the unique missional opportunities and needs of your community? Interview three people in your community to gain insight; such as a political person, a school administrator, and a business person.
- What is the growth potential of the surrounding community? (ethnic, economic, demographic changes, included.) (*Refer to the MissionInsite report.*)

# Worksheet 4

## *Evaluation of Finances and Facilities*

*"For which of you, intending to build a tower, does not first sit down and estimate the cost, to see whether he has enough to complete it?" – Luke 14:28*

*Using as many pages as needed, respond to each of the following inquiries:*

- What is your giving per attendee for each of the past three years? (Divide your average giving by the average worship attendance)
- Do you get more than 15 percent of your general fund income through fundraisers? What percentage of money raised in fundraisers comes from people not in your congregation?
- What is your intentional stewardship process or annual campaign? How closely has actual giving met expectations?
- What percentage of your budget is supported by your top 5-10 givers? What percentage of your budget comes from people over 80? Over 70? Over 60?
- What is the current year's budget?
  - Is the church able to meet its current budget?
  - Does the church anticipate being able to meet its budget for the next 2-5 years?
  - What anticipated major expenses will affect your financial health? Explain.
- List your apportionment payment history – most recent 10 years of data. Report both dollars paid and the percentage.
- List pastoral and staff financial compensation:
  - Salary plus benefits for Pastor and staff.
  - What percentage of the total church budget is pastoral and staff compensation?
  - Estimated pastoral salary range the church can afford, still pay apportionments, and care for other expenses.
  - Estimated total staffing compensation the church can support, continue to pay apportionments, and care for other expenses.
- Indebtedness:
  - List any debt in dollars the church owes to an outside lender. List any lines of credit and how they are used. Is the church in good standing with payments? If not, explain.
  - Is the church borrowing from designated funds, memorial funds, endowment principle, or any other designated or committed fund to meet operating expenses? If so, explain.
  - Is the church in debt to the Annual Conference for past pastoral benefits? If so, explain.
- Building condition and expenses:
  - Does the church have a parsonage? Is it occupied by a Pastor/church leader? Does it meet the new conference parsonage standards? (*See Conference Journal – Standing Rules*)
  - Is the church in need of major capital improvements? Does the church have the finances to make these improvements?
  - Is the church currently able to meet weather-related capital needs?
  - Is the church handicapped accessible?
  - What is your church's parking capacity? Worship capacity? Fellowship meal capacity? education capacity?

# Worksheet 5

## *Evaluation of Ministry Study*

*“So Ananias went and entered the house. He laid his hands on Saul and said, ‘Brother Saul, the Lord Jesus, who appeared to you on your way here, has sent me so that you may regain your sight and be filled with the Holy Spirit.’ And immediately something like scales fell from his eyes, and his sight was restored. Then he got up and was baptized, and after taking some food, he regained his strength.” – Acts 9:17*

This worksheet is built on a synthesis of the first four worksheets. Create a document that quickly outlines in a logical way the key findings of Worksheets 1-4: what was learned, discerned, enlightening and relevant. Once that is done, the Forward Team can complete Worksheet 5 by addressing the following questions. Keep in mind that Worksheet 5, for all intents and purposes, becomes the report that is sent to the District Superintendent for his/her reading at the final Congregational Meeting.

- Evaluate your church and the path it has taken to arrive at today’s circumstances.
- Evaluate the efforts you have undertaken to turn around the church with which God has entrusted you.
- Is your church in a community that has enough population to support growth in ministry?
  - Have there been significant demographic changes in your community?
  - Are there other churches within a 5-mile radius of your church whose proximity would impact your ability to draw enough people to your ministry?
- Do you have a compelling vision for ministry?
- Are you willing to undergo significant change in order to do ministry?
- Do you have key leadership who have the time, energy, faith and commitment to lead this congregation into and through the necessary changes ahead?
- Do you have the financial resources to support ministry?
- Do you think that your building is adequate to support growth? If not, are you willing and able to undertake a capital improvement drive and commit to the time and budget to complete any building/parsonage improvements needed for change?

### **Based upon your answers to the above questions:**

- What is the potential for ministry in the community in which the church sits?
- Does the church currently have the resources (a compelling vision, missional leadership, and the necessary financial/facilities resources) to serve the community through ministries of nurture, outreach, and a witness? If so, explain.
- Is the church currently able to fulfill its call to ministry and to optimize the stewardship of the ministry resources available? If so, explain.



# **FORWARD** **FOCUS**

## The Life Cycle of a Church

# The Life Cycle of a Church



*Everything has a life cycle. The church has a life cycle much like a human being:*

## **First stage – Birth**

A time when the congregation is new. During this time, the congregation begins to understand its purpose. There are founding members who set the tone for the future of the church. Core beliefs are established that often form decision-making and the mission and ministry of the congregation for the life of the church.

## **Second stage – Formation**

A time when growth in membership and ministry occur. The church continues to formulate its core beliefs and ministry, which began in the birth stage.

## **Third stage – Stability**

A time when things are going well, but the growth of the formation has slowed or stopped. While financial stability is gained, conditions are present that bring doubt about financial growth in the future. Ministry is seen as what we do now. The congregation is comfortable with what is going on. They are hesitant to venture out to do new things.

## **Fourth stage – Decline**

Distinguished by loss of membership and decreased financial stability. Ministry begins to look inward instead of outward.

## **Fifth stage – Death**

Defined by the congregation's deciding to close the doors of the church.

The church life cycle is never a perfectly symmetrical shape. The life cycle is not a perfect semi-circle. Often the growth side of the curve is much steeper, or it could be more gradual. No church declines at the same pace as another church does. The rate of growth or decline happens at different paces. There are often events or movements that cause a sharp increase or decrease in the rate of growth or decline. This can happen at any place in the cycle.

When the church hits one of these rapid growth seasons it is called a “Point of Inflection.” Points of inflection (a time of significant change in a situation; a turning point) come most often by intentional decisions when we discern and act on God’s will. Points of inflection are easier on the growth side of the cycle.

When the congregation is moving toward decline or death these points of inflection are harder to complete and take more energy. They are, however, possible. Becoming God’s church, God’s agent for change in the community, spearheads this “turning point.”

We begin this change of situation by asking three questions and acting on the answers by doing mission and ministry:

**Who are we?**

What is our average age? What is our financial situation? What can we learn from our history? What kind of facilities do we have and how do we use them? What is a realistic picture of our congregation?

**Who is our neighbor?**

How many people live around us? What does the average household around us look like? Does the community look like the people who attend our church? What are the needs of the people who live around us? All of these questions lead us to an understanding of the biblical question, “Who is our neighbor?”

**What are we here for?**

This question is informed by the first two. What do we do about what we have discovered about our congregation and our community? This question leads us to mission and ministry. When we have an answer to the “What are we here for?” question, we begin to think outwardly. We begin to see a new future. We get a clear understanding of our purpose. We get our marching orders from God.

Once we have answered these questions, the “point of inflection” can happen.

**We can indeed have a turning point.**

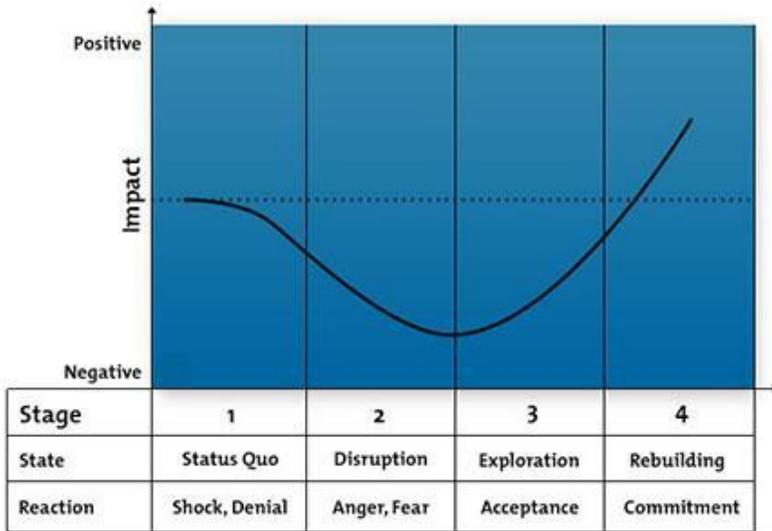


# **FORWARD** **FOCUS**

## The Change Curve

# The Change Curve

The Change Curve model describes the four stages most people go through as they adjust to change. When a change is first introduced, the initial reaction from people might be shock or denial, as they react to the challenge to the status quo. This is **Stage 1** of the Change Curve.



Once the reality of the change starts to hit, people tend to react negatively and move to **Stage 2** of the Change Curve. They might fear the impact, feel angry, or actively resist or protest against the changes. Some will wrongly fear the negative consequences of change. Others will correctly identify real threats to their position.

**As a result, the organization experiences disruption which, if not carefully managed, can quickly spiral into chaos.**

For as long as people resist the change and remain at Stage 2 of the Change Curve, the change will be unsuccessful, at least for the people who react in this way. This is a stressful and unpleasant stage. For everyone, it is much healthier to move to the next stage, where pessimism and resistance give way to some optimism and acceptance.

At **Stage 3** of the Change Curve, people stop focusing on what they have lost. They start to let go, and accept the changes. They begin testing and exploring what the changes mean, and by doing so they learn the reality of what's good and not so good – and how they must adapt.

By **Stage 4** of the Change Curve, people not only accept the changes, they start to embrace them. They rebuild their ways of working. Only when people get to this stage can the organization really start to reap the benefits of change.

## Tip

It's easy just to think that people resist change out of sheer awkwardness and lack of vision. However, you need to recognize that change might affect some of them negatively in a very real way that you might not have foreseen. For example, people who have developed expertise in – or have earned a position of respect from – the old way of doing things can see their positions severely undermined by change.

## Questions Concerning Change

*After a time of teaching to help the group understand the role that change plays in the congregation, it might be a good time to consider some or all of these questions:*

- When have you or your church experienced change?
- In what ways was the change positive?
- In what ways was the change difficult?
- What were the different reactions? Shock, denial, anger, fear, anxiety, excitement, joy, eagerness, acceptance, commitment?
- What have you learned through change?
- What are some effective ways to communicate during change?
- What are some ways to help work toward change for the maximum outcome?
- What commitment is needed for change to happen?
- What are some things to know before beginning a change process?

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# **FORWARD** **FOCUS**

## Covenant Agreement



# Covenant Agreement



*For South Carolina United Methodist Churches Participating in the Forward Focus Initiative*

## The Covenant

- 1) This is a voluntary agreement to study the past, present and future potential of \_\_\_\_\_ Church/Charge in the \_\_\_\_\_ District of the South Carolina Conference of The United Methodist Church.
- 2) The Pastor and Lay Leadership are committed to a minimum of three- to five-months' exploration of the church's history, present ministry contexts, and future potential to "make disciples of Jesus Christ for the transformation of the world."
- 3) Each church and Pastor and Leadership Team will commit to pray for the process regularly.
- 4) Each church will, at minimum, recruit and train a Prayer Team and a Forward Team to facilitate the process for the three- to five-month period.
- 5) Each church, through its Forward Team, will share key insights and meeting times with the Congregation to keep all persons apprised of the process.
- 6) The Forward Team will encourage participation of all members and regular attendees of the church or charge to participate in Congregational Meetings.
- 7) The Forward Leader assigned by the District Superintendent will be trained to help facilitate the Forward Focus Process.
- 8) The Forward Leader will have a Congregational Specialist resourcing/coaching him/her during the process.
- 9) Upon completion of the assessment, the Forward Team, in consultation with the Forward Leader, Pastor, Congregational Specialist, and/or District Superintendent will identify next steps.

Signatures of those entering into this Covenant Agreement:

Local Church Lay Chairperson \_\_\_\_\_ Date \_\_\_\_\_

Local Church Senior Pastor \_\_\_\_\_ Date \_\_\_\_\_

Assigned Forward Leader \_\_\_\_\_ Date \_\_\_\_\_

District Superintendent  
of Charge or Church \_\_\_\_\_ Date \_\_\_\_\_

# **FORWARD** **FOCUS**

## Forward Focus Checklist

# Forward Focus Checklist

Your church might find this quick reference checklist useful once you and your congregation decide to participate in the Forward Focus process. This checklist is a simplified one-page list of each step that is laid out in the Forward Focus document. Details about each step can be found in the Forward Focus document.

- Create and deploy Prayer Team to cover the entire process in prayer.
- Pastor and leader(s) meet with Forward Leader.
- Select and organize the Forward Team (Forward Team Orientation).
- Schedule Congregational Meetings #1, #2, #3 and #4.
- Create a plan for communication plan for the Forward Process.
- Forward Team plans Congregational Meeting #1.
- Congregational Meeting #1.      Date: \_\_\_\_\_
- Forward Team completes Worksheets 1-3.
- Forward Team reviews learnings and plans Congregational Meeting #2.
- Congregational Meeting #2.      Date: \_\_\_\_\_
- Forward Team completes Worksheets 4-5.
- Forward Team reviews learnings and plans Congregational Meeting #3.
- Congregational Meeting #3.      Date: \_\_\_\_\_
- Forward Team meets with District Superintendent, Congregational Specialist and Forward Leader to explore, consider and decide the next steps to be recommended.
- Forward Team plans Congregational Meeting #4.
- Schedule Congregational Meeting #4.
- Congregational Meeting #4.      Date: \_\_\_\_\_
- Forward Leader meets with District Superintendent & Church Council (*if necessary*).
- Congregational Meeting #5 (*if necessary*).      Date: \_\_\_\_\_

# FORWARD FOCUS

## Information Gathering Tools

# Information Gathering Tools

*Here are several sources useful in helping gather the information your team will need to make informed decisions about the future of your church:*

**Ezra** – ([ezra.gcfa.org](http://ezra.gcfa.org)) The official data management system of The United Methodist Church, maintained by the General Council on Finance and Administration.

**UMData** – ([umdata.org](http://umdata.org)) The official online directory and statistical information of The United Methodist Church, where you can search for information regarding churches, pastors, leadership, conferences or other entities.

**MissionInsite** – ([missioninsite.com](http://missioninsite.com)) This website empowers churches with the tools they need to visualize and cultivate their current and prospective members, donors and volunteers and solve difficult challenges.

**Online Conference Journals** – ([umcsc.org/home/journals](http://umcsc.org/home/journals)) Digital versions of The Journal of the South Carolina Conference of the United Methodist Church, dating back to 2006.

**Printed Conference Journals** – Find these in your church office, your district office or at the United Methodist Conference Center in Columbia.

**Consensus/discernment** – [Paragraph 252](#) of the Book of Discipline of the United Methodist Church recommends the use of a consensus/discernment model of decision-making.

**Forward Focus homepage** – ([umcsc.org/home/forward-focus](http://umcsc.org/home/forward-focus)) This is where to find all of the forms, PowerPoint presentations and other materials you'll need.

# Instructions for MissionInsite

This website ([missioninsite.com](http://missioninsite.com)) offers congregations an opportunity to gather critical information about the context of their community through a number of demographic reports. This information is critical to the congregation's recognizing new potentials for ministry as it works through the Forward Focus process.

In order to complete Worksheet 3 in the Forward Process, a member of the Forward Team will need to be able to generate an ExecutiveInsite Report of a specified area (within a 12-minute drive of a rural church, or within a 7-minute drive of an urban or suburban church) surrounding your church.

One of the key skills in doing this is creating a virtual polygon around your church. Below are step-by-step instructions on how to do this on MissionInsite. The website also offers a vast array of help videos and documents that can assist you.

While the Forward Focus process requires only that the team analyzes an ExecutiveInsite Report, as a Forward Leader, it would be helpful to spend some time navigating MissionInsite yourself to become more familiar with the layout, navigation system and scope of the reports that can be generated.

## **Drawing a polygon**

- 1) Log in to MissionInsite. The designated Forward Team member will need to create an account and login using the information on the accompanying help sheet.
- 2) Close the "Welcome Screen" pop up window.
- 3) Using the "+" and "-" arrows in the upper left corner, zoom in on the map until you can identify your church. To move the map left and right, you can click on the map and drag it left or right.
- 4) Before actually creating a polygon around your church, take some time to plan the boundaries of the polygon that you will create in the next step. Make mental notes of approximately where 12 minutes (in rural areas) or 7 minutes (in urban and suburban areas) would be in various directions surrounding your church. Imagine where those "points" would be on the map.
- 5) Select the "shapes" drop down menu in the "Map Tools" box in the upper right of the screen.
- 6) Check the "polygon carve out" check box. Once this box is checked, when you move your cursor over the map, it will show up as a small cross. Each time you click your mouse, you create a point on the polygon around your church.
- 7) To start your polygon, locate one point that is approximately the correct driving distance from your church and click your mouse in that spot. Move the mouse to another location on the map that is the suggested driving distance and click again. Repeat this step as needed until you have surrounded your church location with a polygon boundary.
- 8) To complete the polygon, you must click a second time at the same point that you started. When successfully done, the polygon will change to a bright blue color and the cursor will return to normal cursor. Then it is time to create the ExecutiveInsite Report for the carved-out area.

## **Creating the ExecutiveInsite Report**

- 1) Once your polygon carve-out is completed, a new box titled “info” should appear.
- 2) In the “info” box, select the “Predefined Reports” tab.
- 3) This will open another new dialogue box. In this box, select the “ExecutiveInsite” tab. Note: You can change the “prepared for” box to insert your church name if you prefer, but it is not necessary.
- 4) Once you select the “ExecutiveInsite” tab, MissionInsite will automatically generate and open the report. Once it is generated, you have the option to print the report or to download it and save it.

# How to Register

## 1. Open Your Browser

Navigate to: [MissionInsite.com](http://MissionInsite.com). Mouse over the Client Center button on the home page. Select Registration. On the new Registration Information page click REGISTER.

Enter Your Unique AGENCY ACCOUNT ID #:

## 2. Begin the Registration Process

- Select your city and your church.
- Complete boxes creating your unique User Name and Password
- Review terms, check the Accept Terms box and click Register. You will receive an email entitled "Confirm Your Email" asking to confirm your email address which contains a link to activate your account. This link will be valid for 24 hours. Following your account activation, a new window will open to enter your User Name and Password to login to the PeopleView™ System. Check your Spam/Junk box if the email does not appear in your Inbox.
- For future logins, hover over Client Center button on the MissionInsite Home Page and select "login" from the drop down menu.
- Do not make multiple attempts at registration. If a problem occurs, please contact us for support. 877-230-3212 Ext. 1011 or [misupport@missioninsite.com](mailto:misupport@missioninsite.com)
- Only one User Name and Password per user. For users with multiple agency relationships (i.e. a local church AND agency user), please contact your agency administrator to add additional study area options to your login.

## 3. Welcome Screen



The Welcome Screen provides a basic introduction to essential tools to gain full value of PeopleView™ System functions and resources for your congregation. Resources are organized in CoreView, CommunityView and FusionView. Click each button to view these key resources.

## 4. Introducing CoreView, CommunityView and FusionView.

### CoreView

**Who are We?**  
CoreView begins with People Plot. People Plot provides insight, organizational identity and reach of your congregation — these are your core assets.

### CommunityView

**Who is our Neighbor?**  
CommunityView informs you about your mission field diversity.

### FusionView

**How do we Engage Our Community?**  
FusionView employs discoveries and learnings from CoreView and CommunityView to assist in development of strategic solutions for mission and ministry.

## 5. Essential Support Resources

(Mouse Over the Help Tab on the Upper Left of the Map Screen)

Contains Videos, Documents and How To Information Including Live Chat. Review each tab to discover the wealth of material available to assist you in your use of the PeopleView System. Resources Include: **The Mosaic Household Portraits**

- **Mosaic USA Group Segment Descriptions by Experian** (*71 Individual Segments & 19 Groups*)
- **Mission Impact Mosaic Application Guide by Bandy** (*Practical ministry application suggestions for each Mosaic segment: Leadership, Hospitality, Worship, Education, Small Groups, Outreach, Property and Technology, Stewardship/Financial Management and Communication*)

## 6. Quick CommunityView Reports - Select Report Wizard

Mouse Over the Tools Tab (Top Left of Web Page)

The Report Wizard will assist users in rapid and easy creation & customization, for all geographies, of QuickInsite™, ExecutiveInsite™, FullInsite™, Impressions™ or Quad™ Reports.

## 7. Explore the Map Tools

All PeopleView™ System functions are selected from Map Tools. All reports are based upon geographic shapes. Shapes are created by selecting options in the Shapes tab. Create your first shape and access information with one of the Predefined Reports or Build Report. Build A Report is ideal for accessing data to answer specific questions such as "How many people live within a 20 minute walk of our location?"

Note: All Map Tools functions are described in the Basic Site Orientation on the Welcome Screen.

**FORWARD**  
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