

Helping A Group Through A Process of Self-Evaluation and Change

What This Process Seeks to Accomplish:

This process was designed for use with a task group (such as a committee) or a ruling group (such as a session or presbytery). This process provides for:

- The creation of a mandate statement for the group, which will focus the group's efforts on **what** their appropriate tasks are
- The writing of a rationale for the mandate, to state **why** the mandate is important
- The discernment of the group's values, which will guide them in **how** they will fulfill their tasks
- The evaluation of the current agenda of the group (what do we do well, what needs to be improved, what needs to be dropped, what needs to be added?)
- A starting point for proposing and planning for new initiatives.
- Perhaps most importantly, it provides a forum for learning along the way about group process concerns of the people in your group (such as: relationship with the minister, budget allocations to the group, relationship to other groups, work allocation within the group, etc.)

This process is designed for use through five regular meetings of your group, taking 30 to 45 minutes of agenda time at each meeting. This is to accomplish a few things:

- To demonstrate the importance of incorporating visioning, evaluating and planning into your group's agenda (that is, embedding a habit of review of what we do).
- Over a period of half a year (presuming your group meets monthly) build the priority for visioning, evaluating and planning by habitually doing it at each meeting.
- Get the group accustomed to concentrating its usual agenda into a smaller block of time so time can be made for these activities.

Preliminary work:

The first step is to seek and gain the group's approval for entering into this process. The group must appreciate the value of doing this work, which rests on the promise of the outcome – a clearer sense of their purpose, agenda and function. The more committed the group as a whole is to this process the higher the probability that the outcome will be a good one.

Session One – Reflection on Mandate

Preparation for the First Session:

Prepare a packet of materials to be handed out to group members a week or two before the first meeting. This material is to help them begin to think about the purpose of the group, prompting them to come to the first session with some preliminary ideas. The contents of the packet depends significantly on what the group does (is it a session, a Christian Education Committee, a Board of Managers?). Some possible things to include:

- 1] If the church has a mission statement, a vision statement or any long-range goals, ensure group members have an opportunity to read and consider these things. Ask them to read these statements through the perspective of this group's specific purpose and work.
- 2] If you wish to broaden the base to include denominational direction, you can include the VISION statement of the Presbyterian Church (found on page 202 of the 1989 Acts and Proceedings) or our Mission Statement for the denomination (found on page 201 of the 1995 Acts and Proceedings).
- 3] You should include specific scripture passages to help focus reflective thinking on the mandate given to the Church generally by Christ and scripture.
- 4] Ask members to consider the following questions prior to participating in the first session: "What is our essential purpose or task as a group or committee? What do these materials suggest to me about what our purpose should be?"

The First Session:

Work through the following three questions:

- 1] In one sentence, what is our "mandate" or "primary task" or "reason for existing"? [this is to elicit a simple, single sentence statement of purpose]
- 2] In as broad and as thorough terms as we can describe, elaborate what this mandate really means for us? [the mandate statement is to be a simple summary of purpose. This description fills out how the group understands that statement. You could say "this is the definition of the mandate", or "the philosophy of the group", or "our interpretation of what this mandate means for us"]
- 3] Why do we pursue this goal? Why is it important? [this is to further fill out the group's understanding of its mandate.]

Capture all these ideas by writing them down on newsprint on the wall or on a flip chart. Seek group agreement on the points. If you can, have a recorder (using notepaper or a laptop computer) keep a portable record of the ideas. Once this exercise is completed, the facilitator should take the material and promise to have a written draft version of these ideas to the group at its next meeting for the group to consider, edit and adopt.

This is the end of this session's work. Assign the following thought for reflection in preparation of the next meeting: "Let's just imagine that a year from now this goal could be completely fulfilled. Time, money and people have been no object. We have been totally successful and the congregation has dismissed us with their thanks. "Well done, good and faithful servants!" What would our church look like if our mandate was COMPLETELY implemented? What would be going on in our church?"

Follow-up from the First Session:

Prepare a report on the discussion, outlining:

- a copy of the single sentence mandate statement
- the fuller description of what this mandate means and why it is important to pursue
- add again the homework thought for reflection for the next meeting:
- send this report out to group members in advance of the next meeting, asking them to bring their suggestions for improvement on the work they've already done.

A Christian Education Committee's Mandate Statement

Here is an example of the work done by a congregational Christian Education Committee. This same committee's work will be highlighted as examples throughout this process so you can get an idea of the results of one real group.

Mandate: "to provide programming in the knowledge of faith for people of all ages".

What This Means to Us: "Our role is to help people to grow spiritually. This growth enhances one's relationship with Christ, prompting greater discipleship in prayer, in one's devotional life (reading and reflecting on scripture), and to discern one's personal ministry as a Christian. As we fulfill our mandate people will come to understand God and themselves better, discover their growing edges in faith, become more confident as a Christian, and find worship more meaningful. Bible studies will be helpful, but also the opportunity to learn about faith by reflecting in group's on people's experiences as Christians.

Session Two – Reflection on Values

Preparation for the First Session:

Ensure the follow-up work outlined above has been completed.

The Second Session:

Begin with a review of the mandate statement and its description coming out of the last meeting. Ask for improvements, then get the group's agreement on the mandate.

Discuss the following scenario: "Let's just imagine that a year from now this goal is completely fulfilled. Time, money and people have been no object. We have been totally successful and the congregation has dismissed us with their thanks. "Well done, good and faithful servants!" What would our church look like if our mandate was COMPLETELY implemented? What would be going on in our church?"

Encourage the group to let their imaginations wander on this one. Don't put up any boundaries, explore all possibilities. Be extravagant, hopeful and humorous!

Divide a large, wide sheet of newsprint vertically down the middle into two halves – left and right. In the left column list the glimpses of the future, leaving the right column blank.

Once all the ideas are up on the wall, revisit each image of the future church. Ask of each idea "what might this image tell us about what we think is important for us as we fulfill our mandate?" Write these values in the right hand column.

Essentially, ask of each point "Why would we want this to be real for us in the future?" Some examples, "People will know their Bible" means Biblical literacy is valued. "People would be going out from church in small groups to have lunch together after worship" means friendship, caring, and taking an interest in each other is valued. "People will be begging for an opportunity to be on a committee!!" means we think service is an important part of belonging to the faith community]

Establishing the group's values helps people understand the "how's" of the the group's mandate. It potentially will provide two things. First, the values should point to what the group wants built-in to their "product" (the product of a task group is the accomplishment of tasks, while the products of ruling groups are decisions made and actions taken). Second, it can point to the qualities this group wants to express as it lives out its own life as a group. The facilitator of this process can guide the group to focus in on one or other or both of these.

Once this part of the exercise is done, the group should "step back" from this statement of values and consider if it is complete. Ask:

"Is there anything missing from this list which should be on it?"

"Does our mandate statement and its description prompt us to add anything else to this list of values?"

This is the end of the second session. In preparation of the third session, give group members a handout listing every task and responsibility that is currently on the group's annual agenda. Their homework for the next meeting is to consider all that they do as a committee, using the new mandate and values statements as guides for reflection. People can ask of their group's agenda: "Given this mandate statement, what are we doing well?" "Given this mandate statement, what needs to be dropped?" "Given our mandate statement and the needs of our congregation, what do we have to add to our agenda?" "Given our values, how can we enhance what we do for the church?"

Follow-Up from the Second Session:

Prepare the final approved version of the Mandate Statement and its description. Add to this the draft of the values. Attach to this the group's annual agenda and task list, along with the reflection questions given above. Mail out to group members a week or two before the next session.

A Christian Education Committee's Mandate Statement

We value:

- faith is more than knowledge, but also a relationship with God
- prayer acknowledges that faith is at our center
- scripture is foundational to faith
- faith must appear relevant to people of all ages
- continuity of faith is important from generation to generation
- it is incumbent upon us to share our faith and to live our faith in love
- it is important to nurture in members a value for service
- being part of a "connectional" church is important: we can help other congregations grow as churches.

Session Three – Reflection on the Agenda / Task List of the Group

Preparation for the Third Session:

Ensure the materials listed in the follow-up to session two are sent out.

Have lots of newsprint ready on the walls for this session – you will use it! This will probably be the longest session. It may be wise to make this exercise the only topic of discussion for the group's meeting.

Have one piece off to the side from the main working wall, and label it "Issues". In the process of evaluating the tasks and agenda of this group people will name issues that are separate from the tasks but have an impact on how the tasks get done. Some example issues are:

- "But again we run into the fact that we don't have enough money to do things like this!"
- "We are always attracting the same small core group to our adult educational activities"
- "We all agree that all these things are important, but to do them we will need more people. And we all know how hard it is to get people to join this committee!"
- "Whether it's Presbyterians Sharing, Foodgrains Bank, or helping with the local mission to street people, our members don't seem to appreciate the priority missions is to have for us"
- "But like the Burns Supper, it's hard to hold a Shrove Tuesday Pancake Supper because the hall is too small".
- "Isn't the minister overworked already?"

The issues can be anything, really. The only criterion for being an "issue" is that the group acknowledges that these things stand in the way of completing their work. This means issues can be aspects of congregational culture, the availability of resources (space, people, time, money), the nature of the wider community beyond the congregation, and things like this. Some issues may be well known, chronic and hard to deal with. Others may be easier to deal with. However, all of them need to be addressed as they represent roadblocks to improving the life of your church.

As you work through an evaluation of your group's agenda and tasks, listen for the "issues" being raised. Seek the group's agreement that what you are hearing really is an issue, list it, and put it on the group's agenda for discussion in weeks four and five.

The Third Session:

Again, start by reviewing the list of values. Is it complete? Do any need editing? Are there too many? Any other changes?

Give an overview of your goals in this session:

1. To review the agenda / task list for the group to determine what needs to be kept, dropped, added or improved.
2. Seek to uncover some issues which the group needs to deal with in accomplishing their mandate.

Review the group's agenda or task list. Check first to see if anyone thought of any tasks that were missed from the list.

Review the current tasks of the committee. In light of your mandate and values, how are these things going?

Were there any tasks in recent years that this group thought about putting on its agenda but were unable to? Why? Should they be on the group's agenda?

Was there anything that the group did at one time, but then dropped from its agenda? Do any of these tasks need to be put back on the agenda?

Keep track of any issues raised by the group.

Once the group has visited its entire agenda, go back over its items to pick out what the group believes should be the priorities for the future. Note them.

End with a review of the issues. Ask of the group:

"Are there any issues that you think are important which aren't up there?"

"Of this list, which ones do you want to address in the next meeting or two?"

"Which one do you want to tackle first?"

This ends the third session. Promise to make up a summary of the work the group did. Ask people to reflect on the issues before the next meeting.

Follow-Up from the Third Session:

Make up a summary of what you have accomplished so far. Start again with the Mandate and its description, as well as the values as agreed upon. Next list out the items of the agenda / task list and the group's assessment of it. Highlight the agreed upon priorities for the future work of the group. Next list out the issues, with a bit of a description of its scope. Ask people, as homework before the next

meeting, to reflect on how the group can deal with these issues (especially the one chosen to be tackled first).

A Christian Education Committee's Assessment of its Tasks

Future Directions for our Programme – First Priorities

1. Small Groups

Do we have goals for these groups?

Do we need goals for them?

How can we better support our small groups?

We should foster more groups as well as different kinds of groups (study groups, support groups, mission groups)

2. Prayer

How can we help nurture prayer in all our groups and committees?

3. New Sunday School for the 11 AM service

Investigate the "Children at Worship" programme

Future Directions for our Programme – Second Priorities

1. Start up a new congregational level Bethel class in the fall.
2. Improve our education on faith sharing.
3. Add leadership development workshops to the program.

Sessions Four and Five – Reflection on Issues

Preparation for these Sessions:

Ensure the follow-up materials listed above are mailed out in advance of the meeting.

These sessions will be quite unique and free form, given the specific nature of the issues for this group. The facilitator may be able to prepare a process to guide the discussion given what the group has shared about the issues. The goal will be to move towards resolution of issues, as they stand as barriers to task completion. However, this may not be simple. Resolution may require:

- Discussion of sensitive matters
- New resources: time, volunteers, money, priority, space.
- Involvement of more people than just the group.
- It may require the discussion of several interlinked issues that can't be dealt with separately.

What can help in focusing the discussion are a series of questions, proposed by the facilitator or the group as a whole. What can help as well is a confession that the issues at hand are difficult and chronic, that they will take time, but the dividends arising from dealing with them will have impact not only on their agenda but even more broadly in the congregation. In fact, dealing with these issues may be more important, in the long run, than improving their agenda / task list.

The Christian Education Committee that has been our on-going example came up with these issues. This committee serves a large, multi-staff church.

1] Promotion of Programs and Improving Involvement

- While we have many people take part in our varied program, still only about 1/3 of the members make use of it.
- Questions: what can we do to build people's interest in our adult educational program? Are we offering what people want? How do we get them to consider what we think they need? How do we encourage people to sign up earlier for programs?

2] The Committee has a High Level of Dependency on Staff:

- We appreciate that our staff are educated and experienced in their fields, that people want the high quality program staff can provide, that they have taken on many tasks that volunteers have not wanted to do, that they are creative and insightful people.
- Over time, though, they have assumed many of the responsibilities this committee had. We have been happy to let them take these on. But this has reduced our real agenda for what we do as a group.

- Questions: what are our expectations for ourselves as a committee? What should we let go to staff (and be happy about)? What should be our unique agenda separate from staff? What is our unique role?

The issues may be very hard to deal with. This can lead groups to become disheartened about themselves. This is why continuing on with improving the items on the agenda / task list is so important. If people can see that they can make headway with these easier, but also important, things, then they can maintain their sense of confidence as they tackle the bigger, deeper issues.

Other Suggestions:

Keep the leadership of the church (even the whole congregation) appraised of the progress this one group is making.

You can use this first group as a pilot group. This can help you appreciate this process and gain further skills in facilitating planned change. But a pilot group can also be a help to other groups as well, as the experience of the pilot group may help encourage other groups in the congregation to undergo such a process.

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