**Congregational and Community**

**Research**

**And**

**Assessment**

**Manual**

*The Way of St. Paul Project*

*The Episcopal Diocese*

*Of*

*New Jersey*

**Congregational and Community Research and Assessment Process**

**An Overview**

The Congregation and Community Assessment Process is designed to develop a profile of the spiritual and religious needs and practices of a faith community and its surrounding context.

In this process a congregational task force of investigators works with selected representative individuals and groups within the congregation and its immediate community to develop a spiritual and religious needs and practices “map and narrative” that can inform the mission and ministry of the congregation.

This investigation, guided by a local task force and built upon existing relevant information, utilizes surveys, interviews, focus groups and site observations to gather a variety of data that is interpreted in conversation with stakeholders and coalesced in a spiritual and religious needs and practices “map and narrative.”

**Assessment Task Force Composition and Work**

Consisting of 3 to 5 persons, the task force’s primary responsibility is to guide the investigative process on behalf of the congregation and its stakeholders. The task force is not a decision-making group; its work is the generation of accurate, timely information that informs mission.

**Assessment Tasks**

The assessment process will normally entail seven “clusters” of activities:

* Reviewing and summarization of the existing pertinent congregational and community demographics and any available spiritual and religious needs and practices information;
* Identification and selection of cohorts, individuals and groups to be surveyed, interviewed, invited into conversation and observation;
* Selection and/or design of survey and interview, focus group and observation protocols;
* Conduction of surveys, interviews, focus groups and observations;
* Recording, factor analysis and summarization of data gathered;
* Reflection on/interpretation of the data gathered with selected subjects; and
* Dissemination of findings to subjects and authorized decision-makers.

**Assessment Timeline**

The assessment process will normally consist of five phases over three or more months:

* *Preparation:* selecting/orienting the Task Force; reviewing and summarizing of pertinent existing information; setting the framework and scope for the investigation; (Two to three weeks)
* *Design and Training:* survey, interview, focus group and observation materials, processes and schedule; imagine and select cohort(s); orienting and preparing interviewers, focus group leaders and observers; (two to three weeks)
* *Investigation and Archiving*: gathering, transcribing and storing information; three to four weeks)
* *Analysis and Interpretation***:** factor analyzing and reflecting on the themes emerging from the research with a bent toward implications and implementation; (two three weeks) and,
* *Dissemination:* organizing information and its interpretations, distributing the results to stakeholders, and handing off the information and its ongoing interpretation and implementation to authorized decision-makers. (two to three weeks)

Research the Congregation

**Congregation and Community Assessment Process Guide**

**Work Plans**

**Forming the Investigative Task Force**

The three to five Task force members might well have the following capacities:

* Ability to work well with others
* Some working knowledge of social scientific research and its interpretation
* Acquaintance with the life of the congregation and its community
* Strong analytical interests and abilities
* Ability to write well

Task force members: 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

 3 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_: 4 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

 5\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**First Assessment Process**

*Develop a Profile of Spiritual Needs and Practices (SNP) of Your Congregation and Its Community*

(Although developing this profile of the SNP of the congregation and its surrounding community involves a process similar to assessing the faith formation culture of the congregation, each assessment serves very different purposes and gathers different information, therefore each process is described separately in this leadership manual; under some circumstances these tasks may be combined).

**Focus**

**Congregation,** primarily and, secondarily, its **immediate community;**

1. *The Congregation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
2. *The Congregation’s Community(ies) to be studied:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**Information Gathering** **Processes**

A. Gather pertinent background **“literature and observations”** onthe

 congregation and its community;

Congregation’s Membership List:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Congregation’s Last Three Annual Reports: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Congregational Assessment(s) in the Last Three Years: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Other Pertinent Congregation Documents: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 5. Places and Activities to be observed/experienced: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 6. Community Demographics (Website): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 7. Nodal Community Events or Changes in the Latest Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 8. Other Pertinent Community Documents: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 9. Places and Activities to be observed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 10.”‘Gatherer, Observer and Reviewer” Assignments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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B. In the ***congregation***: Conduct **interviews** with representative stakeholder

 persons; conduct **focus group discussions** with “stakeholder” groups; and,

 invite representative persons and all members to complete a **survey.**

C. In the congregation’s **immediate community** conduct **interviews**

 with representative persons; conduct **focus group discussions** with

 representative groups; and invite representative stakeholder persons to

 complete a **survey;**

*1.* ***Interviewees:*** *4-5 representative, stakeholder individuals from* ***the congregation;*** *1-2 representative individuals from* ***the congregation’s community;***

*Representative, Stakeholder* ***Congregational*** *Interviewees:*

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 *Representative* ***Immediate Community*** *Interviewees:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *2.* ***Focus Group Participants:*** *3-5 representative, stakeholder groups from* ***the***

 ***congregation;*** *1-2 representative groups from* ***the congregation’s community;***

 *Representative Stakeholder* **Congregational** *Focus Groups:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *Representative* ***Immediate Community*** *Focus Groups:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *3.* ***Survey Participants****: 45-50 representative, stakeholder persons in* ***the congregation*** *(to include those interviewed and those in the focus groups), and, 15-20 representative persons in* ***the congregation’s community*** *(to include those interviewed and those in the focus groups) are to be invited to complete the survey.*

 ***Congregation’s “Pool”*** *to be Invited to Complete the Survey:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 ***Immediate Community’s “Pool****” to be Invited to Complete the Survey:*

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 *4.* ***Protocols, Interviewers, Conveners*** *and* Recorders

*Interview Protocols: See Appendix A*

 *Assigned Interviewers: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *Focus Group Protocols: See Appendix* B

 *Assigned Focus Group Conveners and Reporters:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *Spiritual and Religious Needs and Practices Survey: See Appendix C;*

 *also online at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

 *Survey Administrators: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**Analysis**

**A. Notes/reports** taken from the **interviews** and the **focus group discussions** will be combined with **responses from the surveys** to provide the **“data text”** to be analyzed;

1. *Assignments for Gathering Notes and Comments (data text): \_\_\_\_\_\_\_\_\_\_\_\_\_*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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1. *Designated “Repository” of Gathered and Stored Notes and Comments:*

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**B. Factor Analysis Phase One**: each **“item/idea”** in the “data text” will be

 **identified** and **coded;**

1. *Each identified item/idea is circled;*
2. *Circled items/ideas are reviewed and numbered; the same or very similar items/ideas are given the same number;*

**C. Factor Analysis Phase Two**: the coded items will be gathered into **clusters of**

 **inter-related material;**

1. *Items/ideas of the same number are gathered into clusters;*
2. *Items/ideas occurring only once are examined for their possible relationship to existing clusters;* *if do not, they remain as single, noted elements;*

**D. Factor Analysis Phase Three**: the clusters of inter-related material will be

 gathered into **themes of meta-related material**;

1. *Clusters are examined with an eye toward possible inter-cluster relationships; the inter-related clusters become themes;*
2. *All clusters and single noted elements unrelated to themes are noted and continue as a part of the ongoing data text and emerging summary report.*
3. *Assigned Analysts and Report Writers: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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 *(Note: at least two persons should be designated to do these analyses, so as to provide a degree of inter-rater reliability).*

**Reporting**

1. The **themes** of the data analysis *will become* the **structure of an accurate, balanced summary** **report** of the information gathered.
2. The **summary report** with the **factor analysis worksheets appended** will be *passed along* to the **entire Way of St. Paul Leadership Team;**
3. The **Way of St. Paul Leadership Team** will ***study*** *and “****mine***” the summary report through the lens of: **“How might this inform our selection and design of a Way of St. Paul Project?”**
4. The study and “mining” of the summary report *will result* in a brief, **focused narrative** *citing* **discoveries and implications germane to the selection and design of the Way of St. Paul Project.**

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**Faith Formation Assessment - Congregation**

**Research Target Audiences**

This FF narrative might well include descriptions of the congregation’s following elements:

* Its Mission
* Its Vision for Transmitting and Forming Faith
* Its Congregational Community Life
* Its Ministries with a Focus on Transmitting and Forming Faith
* Its Faith Practices – Individual-Familial-Congregational
* Its Leadership

**Focus**

The Congregation

**Information Gathering Process**

 **A.** Gather pertinent background  **“literature and observations”** on the

 congregation’s faith formation culture.

Gather materials related to the Congregation’s:

 Mission: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Vision for Faith Formation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Community Life: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Ministries of Faith Transmission and Formation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Practices - Individual-Familial-Congregational:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Leadership:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 Other Pertinent Materials: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Places and Activities to be observed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Gatherer, Observer and Reviewer Assignments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**B**. In the congregation: conduct **interviews** with representative stakeholder

 persons; conduct representative, stakeholder **focus group discussions;** and,

 invite representative stakeholder persons who with the entire congregation will

 be encouraged to complete a **survey;**

1. ***Interviewees****: 4-5 representative, stakeholder individuals from the congregation;*

  *Representative, Stakeholder Congregational Interviewees:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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1. ***Focus Group Participants****: 3-5 representative, stakeholder groups from the congregation;*

 *Representative Stakeholder Congregational Focus Groups:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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1. ***Survey Participants****: 75 representative, stakeholder persons in the congregation (to include those interviewed and those in the focus groups) together with the entire congregation are encouraged to complete the survey;*

 *Congregation’s Pool to be Invited to Complete the Survey:*

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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**C. Protocols, Interviewers, Conveners and Recorders:**

1. *Interview Protocols: See Appendix D*
2. *Assigned Interviewers\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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1. *Focus Group Protocols: See Appendix E*
2. *Assigned Focus Group Conveners and Reporters:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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1. *Congregational Faith Formation Culture Assessment Tool: See Appendix F; also online at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
2. *Survey Administrators: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Analysis**

(See Pages: 5-6 for analysis instructions)

**Reporting**

(See Pages: 7-8 for reporting instructions)

**Appendix A –** Congregational and Community Spiritual and Religious Needs and Practices Interview Protocols

**Spiritual and Religious Needs and Practices**

**Interview Protocol**

Thank you for your positive response to our invitation to be interviewed. This interview is an important element in our congregation’s desire to better serve its people and its surrounding community.

I am: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; I’m one of the task force members of the Way of St. Paul Project at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 I have a few questions for us to discuss; during this discussion, I will be taking a few notes so that I more accurately recall our conversation. While this information will inform our study, no names will be attached to any of this discussion. Is it all right for us to continue?

1. **Question:** Can you tell me about your religious or spiritual background? If you are able, go back to your childhood and your family and begin there and continue up until the present.
2. **Question:** So how would you describe the role and influence of faith, spirituality and/or religion in your life presently?
3. **Question**: What practices and/or experiences are of importance to sustaining your faith or nurturing your spirit?
4. **Question:** Do you have needs or limitations in your life that you imagine could be effectively addressed by a faith or spiritual community with effective religious or spiritual practices? If so, what are those needs or limitations? What might those practices be?
5. **Question**: What’s your sense or view of the Church?
6. **Question:** What might someone/church who is interested in encouraging meaningful, authentic lives that make a differenced be doing?

Again, thank you. Would you be open to completing this short survey? If so, I’d be pleased to wait for you to complete it, so that I can take it with me.

**Appendix B –** Congregational and Community Spiritual and Religious Needs and

 Practices Focus Group Protocols

**Spiritual and Religious Needs and Practices**

**Focus Group Protocol**

1. Thank you for your positive response to our invitation to be in this focus group discussion. This discussion is an important element in our congregation’s desire to better serve its people and its immediate community.
2. I am: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; I’m one of the task force members of the Way of St. Paul Project at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;
	2. I have a few questions for us to discuss; during this discussion, I will be taking a few notes so that I more accurately recall our conversation. While this information will inform our study, not names will be attached to any of this discussion. Is it all right for us to continue?
3. **Question:** Can you tell me about your religious or spiritual background? If you are able, go back to your childhood and your family and begin there and continue up until the present.
4. **Question:** So how would you describe the role and influence of faith, spirituality and/or religion in your life presently?
5. **Question**: What practices and/or experiences are of importance to sustaining your faith or nurturing your spirit?
6. **Question:** Do you have needs or limitations in your life that you imagine could be effectively addressed by a faith or spiritual community with effective religious or spiritual practices? If so, what are those needs or limitations? What might those practices be?
7. **Question**: What’s you sense or view of the Church?
8. **Question:** What might someone/church who is interested in encouraging meaningful, authentic lives that make a differenced be doing?
9. Again, thank you. Would you be open to completing this short survey? If so, I’d be pleased to wait for you to complete it, so that I can take it with me.

**Appendix C –** Congregational and Community Spiritual and Religious Needs and

 Practices Survey

**Spiritual and Religious Needs and Practices**

**Survey**

**Introduction:**

Thank you for your interest and participation in this short survey. While it will require only a few minutes to complete, it will greatly assist the leadership of our congregation to reflect on its life and mission.

**Demographics:**

**Are you: *(Check all that apply to you)***

 Sex: Female \_\_\_\_ Male \_\_\_\_

 Age:

 0 – 10 \_\_\_\_ 31 - 40 \_\_\_\_ 61 – 70 \_\_\_\_ 91 + \_\_\_\_

 11 – 20 \_\_\_\_ 41 – 50 \_\_\_\_ 71 – 80 \_\_\_\_

 21 – 30 \_\_\_\_ 51 – 60 \_\_\_\_ 81 – 90 \_\_\_

**Regarding Spiritual and Religious Needs:**

1. Indicate the extent to which each of the following describes you: *(To a great extent – To some extent – Not at all)*
* Have sense of connection with God/Higher Power
* Am interested in spirituality
* Am unsettled about spiritual and religious matters
* Feel good about where my life is headed
* Sense a connection to humanity
* Am disillusioned with my religious upbringing
* *Believe that my life makes a difference*
* Committed to introducing my faith to others
* *Have doubts about my beliefs*
* Am interested in different religious traditions
* Am a spiritual seeker
* *Am a follower of Jesus Christ*
1. My spiritual/religious beliefs: *(To a great extent- To some extent- Not at all)*
* Have shaped my identity
* Are one of the most important elements of my life
* Give meaning/purpose to my life
* Provide me with strength, support and guidance
* Are behind my whole approach to life
* Have been formed through much personal reflection and searching
* *Are still being formed*
1. Which of the following did you experience this past year: *(frequently – occasionally – Not at all)*
* Spent significant time with friends…
* Was bored…
* Felt overwhelmed by all I had to do…
* Felt depressed…
* Maintained a healthy diet…
* Felt anxious…
* Was lonely…
* Had a peak experience…
* My life seemed purposeless…
* Was meaningfully engaged with life…
* What else?
1. What practices and experiences at a church or elsewhere are of importance to sustaining your faith/ nurturing your spirit? *(Very Important – Somewhat Important – Not at all Important)*
* Prayer,
* Yoga,
* Being outdoors,
* Worship services,
* *Small group discussions*
* Adult education
* *Bible study*
* *Singing in the choir*
* *Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
1. If you have children or youth at home, what practices and experiences at a congregation or elsewhere are *of importance* to nurturing your family’s faith and life? *(Very Important – Somewhat Important – Not at all Important)*
* Prayer,
* Yoga,
* Being outdoors,
* Worship services,
* Sunday School,
* Wednesdays at Olivet
* *Small group discussions*
* *Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*
1. How likely would you be to attend the following types of adult programs? *(Very Likely, Somewhat Likely, Not at all Likely)*
* Discussion based and informal
* Informational presentation on Christianity, God, Jesus, or other religious topics
* *Bible study*
* Informational presentation on social justice issue
* Participation in a service project
* Small group alternatives to choose from
* Worship, or learning other spiritual practices
* Other:
1. What interests or capacities do you possess or others that you know possess that if exercised would enhance faith formation and/or spiritual nurture? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. What ideas do you have *regarding faith formation*? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Again, thank you for your participation in this exploration of spirituality and faith!

**Appendix D –** Congregational Faith Formation Culture Interview Protocols

**Congregational Faith Formation Culture**

**Interview Protocol**

Thank you for your positive response to our invitation to this interview. This conversation is an important element in our congregation’s desire to better serve its people and its surrounding community.

I am: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; I’m one of the task force members of the Way of St. Paul Project at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

I have a few questions for us to discuss; during this discussion, I will be taking a few notes so that I more accurately recall our conversation. While this information will inform our study, not names will be attached to any of this discussion. Is it all right for us to continue?

3. **Question:** Can you tell me about your experience and sense of the ways in which our church supports, strengthens and challenges your faith? What practices and/or experiences are of importance

to you and your faith?

4. **Question**: At your church do you see people experiencing a life- giving spiritual community of faith hope and love that is characterized by hospitality, welcoming loved and support?

**Question:** How do you see people experiencing worship at our

church? Do they appear to be or speak of it as engaging? Is

worship at our church easy to understand? Does it seem relevant to daily life?

6. **Question:** Does our church provide a continuity of ministry and faith formation across the whole lifecycle from childhood through older adulthood that promotes growth in Christian faith and discipleship in age-appropriate ways at each stage of life?

**Question**: Does our church provide whole family experiences that promote growth in faith and discipleship, and teach parents how to share faith and life faith practices at home?

8. **Question:** Do the ministry leaders in our church demonstrate effective leadership by modeling faith; aligning values and actions; inspiring a shared vision; challenging assumptions; being innovative and experimenting; empowering others to act; and affirming and celebrating contributions?

9. Again, thank you. Would you be open to completing this short survey? If so, I’d be pleased to wait for you to complete it.

**Appendix E –** Congregational Faith Formation Culture Focus Group Protocols

**Congregational Faith Formation Culture**

**Focus Group Protocol**

Thank you for your positive response to our invitation to be in this focus group discussion. This discussion is an important element in our congregation’s desire to better serve its people and its surrounding community.

I am: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; I’m one of the task force members of the Way of St. Paul Project at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 I have a few questions for us to discuss; during this discussion, I will be taking a few notes so that I more accurately recall our conversation. While this information will inform our study, not names will be attached to any of this discussion. Is it all right for us to continue?

 3. **Question:** Can you tell me about your experience and sense of the ways in which our church supports, strengthens and challenges your faith? What practices and/or experiences are of importance

 to you and your faith?

 4. **Question**: At our church do you see people experiencing a life- giving spiritual community of faith hope and love that is characterized by hospitality, welcoming loved and support?

 5. **Question:** How do you see people experiencing worship at our

 church? Do they speak of it as engaging? Is worship at our church

 easy to understand? Does it seem relevant to daily life?

 6. **Question:** Does our church provide a continuity of ministry and faith formation across the whole lifecycle from childhood through older adulthood that promotes growth in Christian faith and discipleship in age-appropriate ways at each stage of life?

**Question**: Does our church provide whole family experiences that promote growth in faith and discipleship, and teach parents how to share faith and life faith practices at home?

 8. **Question:** Do the ministry leaders in our church demonstrate effective leadership by modeling; aligning values and actions; inspiring a shared vision; challenging the congregation; being innovative and experimenting; enabling others to act, and encouraging others – affirming and celebrating their contributions?

 9. Again, thank you. Would you be open to completing this short survey? If so, I’d be pleased to wait for you to complete it.

##### 2. Conduct focus group research with the target audience.

An excellent way to gather information about people in the community is through focus groups. Organize focus groups of eight to twelve people in the target audience. Select a diversity of people in each focus group, reflecting ethnic/cultural diversity, socioeconomic diversity, and spiritual and religious diversity (from the actively engaged to the “churchless”). Meet for about one hour in a variety of locations and times. Remember that people who are not involved in church may be hesitant to come to a meeting at church. Have two people lead each focus group – one to record (on a computer or tablet is preferable) and one to ask the questions. The recorder can also ask follow-up questions as appropriate.

Use the following questions as a guide for developing focus group interviews. Every focus group needs to asks the same questions so that comparisons can be made across the groups. In a 60-minute focus group there is usually time for at least seven questions that you can select from the following list.

1. How would you describe your age group in key words or phrases?
2. What are some of the key life tasks that your age group is experiencing?
3. What are some of the important life issues that your age group is experiencing today?
4. What are the most meaningful experiences you have in life? What makes these experiences meaningful to you?
5. How important is your relationship with God? Why?
6. Where do you experience God most?
7. What are the significant spiritual issues that your age group is experiencing today?
8. What is most important to you about being a Christian (or a member of a particular denomination or faith tradition) today?
9. How do you live your Christian faith? Name some of the ways you put your faith into practice.
10. How can the church help you to continue growing as a Christian? Be specific. Name some of the things you would like to see your church offer for your age group?

Compile the results from focus groups by identifying patterns or recurring themes in the life tasks and spiritual and religious needs. Also pay attention to information that may be unique to one focus group. Sometimes this uncovers important insights about the target audience.

##### 3. Conduct observation of the target audience in the community.

Engage the team in becoming anthropologists by observing people in the community. Develop an observation checklist and ask team members to spend a week simply observing people at work, at school, at play, at stores, in coffee shops and restaurants, and so on. Watch for things like:

1. What are some of the most popular activities in the community?
2. Where do people gather outside of work and school—coffee shop, gym, mall, park, community center, YMCA/YWCA, and so on.? What are they doing there?
3. Where do people work? Do most people work in the community or do they commute to another area? What types of jobs do people have?
4. What are the most popular or well attended churches in the community?
5. Where are people on Sunday morning, if they are not at worship?

##### 4. Find patterns in the research findings

An “Empathy Map,” developed by the Stanford School of Design, is one tool to synthesize observations and draw out insights from the research. Organize research findings into the following four quadrants: What are people saying, doing, thinking, and feeling? Do this activity as a research team and use one or more sheets of newsprint to compile the findings.

**Empathy Map**

|  |  |
| --- | --- |
| **SAY**What do you hear your target group saying? | **DO**What actions and behaviors do you notice in your target group? |
| **THINK**What might your target group be thinking? What does this tell you about their beliefs/convictions? | **FEEL**What emotions might your target group be feeling? |

Review the results of the “Empathy Map” and identify the *most important needs, interests, issues, and concerns* of the target audience using the five categories: 1) life stage issues (developmental needs, concerns, interests), 2) generational issues, 3) milestones and life transitions, 4) ethnic and cultural needs, and 5) spiritual and religious needs. Record these on newsprint or create a report for everyone.