

SEABURY-WESTERN THEOLOGICAL SEMINARY

“OH, IT’S YOU AGAIN”:

EPISCOPAL VISITATIONS AS CONGREGATIONAL DEVELOPMENT

A THESIS SUBMITTED TO THE FACULTY

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DOCTOR OF MINISTRY IN CONGREGATIONAL DEVELOPMENT

BY

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Executive Summary:

Episcopal bishops engage almost weekly in the process of making visitations to congregations. They spend countless hours traveling to and from these meetings, preparing for them and discussing them with others afterwards. Thus, this activity takes up a large share of a bishop's time week in and week out. Yet, the church at large has not studied these visitations.

This thesis, submitted to the faculty of The Seabury Institute as a part of a D.Min. program, is a first attempt to examine the practice of Episcopal visitations to congregations. It is the position of the author that Episcopal visitations should be opportunities for congregations and bishops to engage in intentional conversations about congregational development. Yet structure, expectations, and parish issues can impede such a process. Through extensive interviews with bishops, this thesis proposes a congregational development model for the ministry of Episcopal visitations.

The work begins by reviewing the findings of a short survey sent to all diocesan bishops in the summer of 2004, highlighting current practices and challenges. The thesis then describes a model for doing visitations focusing on the issue of congregational development and reports on its field testing in two Episcopal parishes. Finally, some implications for practice and future research are examined. I hope that this work will stimulate others to consider how best to engage in this ministry connecting congregations and diocesan structures, and am happy to respond to any questions or comments. I can be reached by e-mail at michael@stchristophers-mn.org.

Yours in Christ, **Michael Hanley+**

ABSTRACT

Episcopal visitations to congregations are critical to the life of the church today. They should be opportunities for congregations and bishops to engage in intentional conversations about congregational development, yet these visitations often do not allow for such conversations to take place. Through extensive interviews with bishops, this thesis proposes the introduction of a congregational development module into the current practices of bishops as they engage in the ministry of visitations to congregations.

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The author wishes to acknowledge those bishops who took the time to respond to the questionnaire and who were so candid in their remarks. I am also indebted to those bishops who went further and offered their time in one-on-one interviews; your comments were most insightful. A deep debt of thanks is also owed to the clergy and vestries of the two congregations who were willing to be a part of this study. Finally, I would like to acknowledge the help given to me by my own bishop, the Rt. Rev. James Jelinek. Your comments throughout the project, and your willingness to try this model out in the field, were essential to the success of this work.

To Marla

Thanks for the coffee

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INTRODUCTION

It's a standard joke. The bishop and the parish priest are in the sacristy just before the start of the service marking the bishop's annual visitation to the congregation. The bishop peeks out of the doorway and notices that very few of the faithful are in attendance. Turning to the priest the bishop exclaims, "Did you tell the people I would be here today?" To which the priest replies, "I'm afraid word did indeed get out!"

In the Episcopal Church, diocesan bishops are required by the canons¹ to visit every congregation in their diocese at least once every three years. In my experience of over twenty years as a priest in three dioceses, these visits have been a mixed blessing to all concerned. Congregations and clergy tend to become anxious over these visits and spend a good deal of time getting ready for the event. In the best of situations, this means that the adult and / or youth confirmation groups finish their classes. The vestry meets to talk about parish life issues it wants to discuss with the bishop, and the liturgy committee plans the service with the help of the documents provided by the bishop's office. In many situations, however, these preparations entail pulling a quick confirmation class together, cajoling the faithful to attend the special day's celebration, and bringing out the silver service to put on a grand reception where people can "meet and greet" the bishop. The experiences of bishops during these visitations are similarly diverse. In the best of situations, bishops and their staffs spend considerable time and energy getting ready for visitations and have high expectations for these events. In many situations, however, bishops report frustration over the process of doing parish visitations. While no one ever says to the bishop, "Oh, it's you again!" it is my belief that the words are on the minds of many who endure this process year in and year out. I would not be surprised to learn that bishops want to say the same thing when they arrive at many congregations for visitation.

Over the years, bishops' visitations to congregations have taken many forms. They have been occasions for confirmation, opportunities to meet and greet the bishop, and wellness checks. Whatever the form, their central purpose has been communication

¹ The Episcopal Church, *The Constitution and Canons of the Episcopal Church*, § title III, canon 18, section 4a (2003).

between parish leaders and the diocesan office. It is the position of this paper that bishops' visitations today need to become more intentionally occasions for congregational development. The bishop's role as chief pastor to a diocese includes assisting congregations in their efforts to grow and develop. Indeed, the examination in the rite for the consecration of a bishop asks the candidate, "As a chief priest and pastor, will you encourage and support all baptized people in their gifts and ministries, nourish them from the riches of God's grace, pray for them without ceasing, and celebrate with them the sacraments of our redemption?"² It is during the visitation process that bishops have the best chance of accomplishing these goals.

This work becomes critical in a time of deep change. Through the work of David Bosch,³ Darrell Guder⁴ and others, the church is beginning to revision its role in society. In North America this involves understanding the church as a marginal and alternative community within a larger, secular society. According to Guder, "The marginal reality of the church is an opportunity to recover the character of the gospel as God's reign in Christ through the power of the Spirit."⁵ If the church is to assume a new and more Spirit-filled role in the wider culture, then our congregations will have to function as assemblies gathered together to live as much as possible within the reign of God on earth.⁶ If the church is to be successful in living out this missionary vision, there will be implications for the daily life of congregations.

In order for bishops and their congregations to engage in this work together, new models for bishops' visitations to congregations need to be explored. I believe such exploration is happening today in the work of many bishops, dioceses, and parish churches. However, there is no current, sustained conversation about the purpose of such visitations. To date, the College of Bishops has never had a presentation on the topic

² Charles Mortimer Guilbert, Custodian of the Standard Book of Common Prayer, *The Book of Common Prayer* (Kingsport, Tennessee: Church Hymnal Corporation, 1977). Pg. 518

³ David J. Bosch, *Transforming Mission: Paradigm Shifts in Theology of Mission* (New York: Orbis Books, 1991).

⁴ Darrell Guder, *Missional Church: A Vision for the Sending of the Church in North America* (Grand Rapids, Michigan: William B. Eerdmans, 1998), 199.

⁵ Ibid.

⁶ Ibid.

during one of their sessions.⁷ Bishops also have no formal way of reflecting on the topic with peers and, thus, the practice of episcopal visitations becomes subject to the idiosyncrasies of individual bishops, dioceses, or even local churches.

The task of revisioning will not be easy. Bishops today work with many agendas competing for their time and attention. While most bishops would claim that they have a responsibility to assist congregations in their development, many find themselves overburdened with other challenges in diocesan and national church life. These challenges often limit the time and attention bishops can give to visitations. Bishops may also find that visitations are unhelpful to leading diocesan efforts at congregational development. Ian Evison, of the Alban Institute, responded to my suggestion that bishop's visitations should be about congregational development with this statement: "Our work with bishops and other denominational leaders is that they find that their role in visitation detracts from the energy that they have to lead congregational development."⁸ If this is indeed the case, then a revisioning of such visitations is essential to their revitalization.

Some bishops have begun to ask how episcopal visitations to congregations can be a healthy opportunity for congregational and diocesan development. This new awareness, and the many tools developed in the field of study known as congregational development, can be used to assist bishops, clergy, and congregations in designing helpful visitation practices. The balance of this paper represents a first attempt to engage bishops and other interested individuals in the topic of episcopal visitation practices. By listening to what bishops themselves have to say, and using the concepts developed in the field of congregational development, a model emerges which allows these visits to be opportunities for congregational development.

Real progress will have been made when churches are full during bishops' visitations, not to impress the bishop, but out of a genuine desire to engage together in a conversation about congregational development. It is my hope that this paper can contribute to changing "Oh, it's you again!" into "Oh, it's good to see you again!"

⁷ As reported in phone conversation with the Rt. Rev. Herbert Donovan.

⁸ Ian Evison, 02/July 2003 e-mail.

CHAPTER 1

A SURVEY OF CURRENT EPISCOPAL VISITATION PRACTICES

Because no sustained conversation exists on episcopal visitations, it was necessary at the outset to establish a sense of the current state of visitations as they are practiced in the church today. To gain this perspective, a short survey was developed and sent to all current diocesan bishops. (See appendix A.) The results of this survey are reported below.

The survey was prepared with the help of the senior bishop of Province Six, James Jelinek. It was deliberately short in order to encourage maximum participation, and it was designed to surface the best practices now in use. Surveys were sent to 97 diocesan bishops and 52 (53.6%) were returned. This large sample represented dioceses from coast to coast, and included dioceses of every size, economic status, and political persuasion. The author is deeply grateful to all of the bishops who took the time to respond and appreciative of the candor with which the responses were made.

Section one of the survey consisted of four basic questions centered on demographic information. This was done on the assumption that the size of a given diocese and the length of the bishop's tenure in office would be of significance to the bishop's overall understanding of the topic. The survey respondents ranged in length of tenure from less than a year to over sixteen years as a diocesan.

| | |
|--------------------|----|
| Less than one year | 4 |
| 1-5 years | 18 |
| 6-9 years | 15 |
| 10 years and over | 15 |

The second section of the survey examined diocesan structure for visitations. The outline of visitations was uncovered to discover their basic framework. Information was gathered on the interval between official visits, the time spent in the congregation, the written communication preceding and following the visitation and what other personnel,

if any, were involved. A request was included in the survey for copies of written documents. These documents helped provide a visual sense of visitation structures. The main goal of this section was to discover the parameters around which visitations take place.

A final section of the survey invited the bishop to discuss in brief what he or she saw as the purpose of the visitations and what was both rewarding and challenging about them. The goal was to invite bishops to share their thinking on the visitations they are currently doing.

After evaluation of the survey results, fifteen bishops were selected for short phone interviews. The bishops selected were those who had indicated a willingness to be interviewed and who were, in their visitations, doing something especially valuable from a congregational development perspective. The follow-up interviews were an occasion to clarify the material from the survey and to explore, in more detail, how these bishops view their work in the visitation of congregations. Information from these interviews is included in the survey results below.

The survey reveals several relevant factors for understanding the issues of episcopal visitations: 1) the common pattern of visitations, 2) the size of the diocese in terms of the number of churches in a diocese and the interval between visits, 3) the length of time spent on site in visitations with congregations, 4) the type of communications employed, 5) the relational challenges bishops face in developing effective visitation practices. The following is an examination of these issues as they were presented in the survey results.

Pattern of Visitations

The survey results indicate that episcopal visitations to congregations run in a predictable pattern throughout the church. Almost all of the bishops reporting include these six elements in a normal visitation. First, there is a conversation with the clergy in the weeks prior to the visitation. Second, a discussion occurs with lay leaders and/or confirmands during the visit. Third, bishops preach, celebrate the Eucharist and, often confirm those presented for that sacrament. Fourth, there is an opportunity for teaching an adult forum, or visiting with church school classes. Fifth, a reception follows the

service with an opportunity to greet parishioners. Sixth, the bishop pays a pastoral visit with the clergy, generally over a meal. The timing or order of these elements varies, and bishops may stress one element over another, but bishops almost universally include them all in a visitation. One bishop noted that the meeting with clergy prior to the visit was essential and that it was during this time that the priest's call to continue to serve in the parish was discussed. Another bishop stressed the importance of meeting with a clergy family in order to discern the health of the family unit. Several bishops felt that a food event in which the laity could ask questions was very helpful in getting issues out on the table.

The strong similarities found among bishops in their descriptions of visitation patterns may stem from their agreement on the basic purposes of visitations themselves. In the survey, the bishops identified two central foci: 1) building relationships between themselves and the people they serve and 2) providing churches with the tools they need for ministry. Bishops view visitations as an opportunity to engage in conversation between themselves, the diocesan institutions they serve, and congregations, and for networking with congregations so parishes can access the programs of the diocese assisting with mission and ministry. The pattern of meals, meetings, and worship has evolved to meet these central goals.

Size of Dioceses

From information provided in the first two sections of the survey, the dioceses responding can be categorized based on the number of churches in active ministry and the interval between episcopal visits.

Twenty-four (47%) of the dioceses studied can be designated as small, reporting under fifty-seven active congregations and a visitation interval that allowed the bishop to meet with congregational leadership an average of once per year. Nineteen dioceses (35%) are medium sized, reporting fifty-seven to ninety-two active congregations and a visitation interval of once every thirteen to twenty-four months. Eight dioceses (16%) are designated large, reporting over ninety-three congregations and a visitation interval of once every twenty-five to thirty-six months.

Table 2. Diocesan Size & Visitation Intervals

| Diocesan size (number of respondents) | Number of congregations in diocese | Number of months between visits | Average interval between visits |
|---|--|------------------------------------|------------------------------------|
| Small (24) | 1-56 | No less than 12 | 12.4 |
| Medium (19) | 57-92 | 13-24 | 20.5 |
| Large (9) | 93-191 | 24-36 | 31 |

In only two dioceses were visitation intervals reported that did not match this categorization. Mississippi reports eighty-four active congregations and an interval of once every year. This is accomplished by scheduling a long and a short visitation in alternate years with the short visitation generally held on a weekday. In Maryland, an additional Bishop and canon to the ordinary are designated as “visitors” and conduct visitations with a unified vision and style. Both of these dioceses have made an effort to maintain a yearly visitation interval, even though the number of congregations served has made it difficult to do so. These efforts were made on the assumption that a yearly conversation between congregations and the bishop’s office promotes congregational health.

Length of Visitation

Along with the interval between episcopal visits, another critical factor in visitations is the amount of time bishops are able to spend with congregational leadership during each visit. As dioceses grow in the number of congregations served, the number of contact hours generally decreases. Bishops of small dioceses report spending an average of six to ten contact hours per visit. The smaller of the middle-sized dioceses report contact hours of up to ten hours and the larger of the middle sized dioceses report spending no more than five contact hours with congregations. In the largest dioceses, the standard number of contact hours appears to be from three to six hours. This suggests that as dioceses grow, it becomes more difficult to sustain a yearly conversation between bishops and their churches.

Table 3. Diocesan Size, Visitation Intervals, and Contact Hours

| Diocesan size (number of respondents) | Number of congregations in diocese | Number of months between visits | Number of contact hours |
|---|--|------------------------------------|----------------------------|
| Small (24) | 1-56 | 1-12 | 6-10 |
| Medium (19) | 57-92 | 13-24 | up to 10 |
| Large (9) | 93+ | 24-36 | 3-6 |

Type of Communications

Together with the actual time spent with congregations, it is important to consider the written communications between bishops and congregations prior to and following visitations. Information exchanged in connection with bishop visitations would seem to reflect the quality of timing, focus, and intent of the bishop. Communications used might provide a roadmap for the conversation ahead, or an analysis of the conversation just completed. The research suggests that, despite a lot of effort, in most cases little real communication occurs between bishops and congregations prior to and following visitations.

Table 4. Correspondence with Parishes

| Diocesan Size (number of respondents) | Sent before visit | Not sent before visit | Sent after visit | Sometimes sent after visit | Not sent after visit |
|--|-------------------------|-----------------------------|---------------------|----------------------------------|-------------------------|
| Small (24) | 23 | 1 | 2 | 7 | 15 |
| Medium (19) | 19 | 0 | 6 | 4 | 9 |
| Large (9) | 9 | 0 | 5 | 1 | 3 |

At first glance, survey results certainly reflect widespread use of written material prior to visitations as all but one of the bishops indicated sending information to the congregations prior to each episcopal visitation. However, a look at the type of materials sent reveals a clearer picture. All but five (90%) send simply a customary with suggestions concerning the celebration of the Eucharist and other details concerning the visitation. Where confirmation is a standard practice during the visitation, additional paperwork is provided to the congregation for this purpose. In only two dioceses do bishops send some mission-focused questions to congregations for their reflection prior to the visit. Only one of those, Maryland, requests that these questions be answered and returned to the diocesan prior to the visit. The bishop of Maryland sends six questions for the priest and eighteen questions to the vestry or bishops committee, from which several are selected for discussion during the visitation. The questions sent to the priest center on issues of the priest's call to serve in the particular community and the answers are discussed at the bishop's meeting with the priest during the visitation process. The eighteen questions for the vestry deal with how they understand God's call to serve in the community and these questions are discussed during a mandatory two hour meeting with the bishop.

Thus, while the survey clearly indicates that bishops and congregations communicate prior to official visitations, the type of communication seems to be limited to details of a liturgical nature. Little or no communication occurs between bishops and congregations to plan the content of the discussions during the visitation. This would suggest that most congregations do little, prior to the visitation, to prepare for any substantive conversation.

Though all bishops report sending information to congregations prior to episcopal visitation, the same cannot be said of follow-up material. Nineteen bishops (36%) report sending no follow-up material. Another eleven (21%) indicate that they occasionally send something in order to answer questions that arose during the visit. Of the remaining twenty-two (42%) bishops who regularly communicate with parishes about the visitation afterwards, the majority send only a confirmation report. One bishop reported sending personal letters to the clergy regarding the visit, and several others indicated that they make notes for conversations with other diocesan staff members, but that these notes are

not shared with the congregations involved. One bishop noted, “I didn’t like bishops’ evaluations as a rector and find that personal phone discussions are more helpful.” Most of the bishops interviewed during follow-up phone calls indicated that correspondence, in all its aspects, is a challenge in the episcopate, due to heavy schedules and multiple responsibilities.

Relational Challenges

A critical set of factors emerged in the research concerning the relational challenges confronting bishops in their pastoral ministry with parishes. Bishops encounter, on multiple levels, systemic and interpersonal dynamics that complicate the process of episcopal visitations.

As bishops reported, a key purpose of episcopal visitations is the building of relationships on the parish level. Such relationships are prerequisite to the second purpose the bishops reported, connecting parishes with resources for more effective ministry. Especially in the early years of an episcopacy, bishops use visitations to develop their diocesan connections. When speaking about those things that make visitations rewarding, the bishops stress the relationships they have formed. They enjoy being with their clergy and with congregational leaders. They remember with fondness pastoral moments, and occasions when real change occurs in a congregation’s life. Seeing growth in a parish, or being a part of a moment when real change occurred, enabled many bishops to bond with congregations. Bishops report enjoying preaching and celebrating the sacraments as sign and symbol of their connection to the body of the faithful. Bishops, thus, understand visitations as occasions for the growth and development of a dialogue between congregations and the wider diocese. Bishops desire and enjoy the relational nature of these encounters and yet struggle with the challenges presented in the processes of building relationships.

Bishops consistently report that it takes a good many years to know a particular church when they only engage with that community a limited number of times in a year. Then to, on “Visitation Sunday” churches can have artificially high numbers of communicants as an all-out effort is put forward to get the people out. Visitors, often

family members there to support the confirmation of their relatives, also swell the throng. Thus, it is difficult to get a clear picture of what a “normal” Sunday looks like.

Another barrier to knowing the real nature of a parish is the predictable desire on the part of the priest and congregation to put their best foot forward for the bishop. Subtle pressures keep the members in a protected and, sometimes, defensive posture. One bishop noted that there are times when people who oppose the “parish party line” are “put under wraps” and not allowed to add their voice to the conversation. Thus, not all of the voices that might be heard are available to the discussion and the bishop’s efforts to get to know the congregation are impeded.

The triangle of diocesan bishop, ordained clergy, and congregational membership also makes relationship-building and resource-sharing difficult. Clergy and parishes are often anxious about the power the bishop may wield concerning parish issues and practices. Clergy and congregations who guard themselves against the bishop’s intrusion in their lives are less likely to engage in open and honest conversation during visitations.

In the most extreme situations, relationship-building becomes challenged by parish conflicts of many types. Clergy sabotage, distrust and defensiveness rate high on the list of challenges bishops deal with when making formal visitations. For instance, bishops report being “blindsided” when local clergy fail to disclose in advance critical parish issues that are surfaced by parishioners. In addition, when bishops enter congregations that are in conflict with diocesan policies, it may be difficult to hold any reasonable discussions concerning congregational development. However, interestingly enough, bishops report holding some of their most effective conversations on parish development during visitations with congregations experiencing internal crisis.

Bishops report two further relational issues. First, most bishops reported that they received no training whatsoever for this ministry. (One bishop even responded with the single word, “Zilch”!)

Table 5. Types of Training for Visitations

| | |
|---|----|
| Trained by experience as parish priest | 22 |
| Informal conversations with other bishops | 9 |
| Trained by Predecessor | 9 |
| None | 38 |
| Trained by experience as diocesan staff | 4 |

Bishops who describe having training said that, at best, they were trained by informal conversations with other bishops, their own experience while parish priests, and expertise gained as diocesan staff or in conversation with the bishop they replaced. Herbert Donovan, who was in charge of the New Bishops' School for many years, indicated that they had never done a training module on visitations at the school. The only formal training noted was a talk by the Presiding Bishop's chancellor, David Beers. At a recent New Bishop's School event, Beers discussed the National Canons concerning visitations, noting what the national canons required and what was, therefore, mandatory and what was optional in the performance of this ministry.

Second, few bishops involve other personnel in episcopal visitations. Thirty bishops (57%) indicated that no one else was involved in the visitations. In those dioceses where others were involved, they provided only logistical help, or the inclusion of a Canon for youth or congregational development in specific cases. In one diocese, the Canon to the Ordinary went with the bishop in cases where a search was underway. In another place, a diocesan deacon attended the visitations of congregations without deacons to model that ministry to the parish. In three dioceses, the bishop's spouse was specifically noted as an important part of the visitation. Finally, in three dioceses, a diocesan council member was present in order to evaluate the scope of the parish's ministry in the larger diocese.

Table 6. Other Personnel Involved in Visits

| | |
|-----------------------------------|----|
| None | 30 |
| Logistical only | 6 |
| Canon or deacon used occasionally | 10 |
| Diocesan Council member | 3 |
| Spouse | 3 |

Summary

Clearly, there are many challenges presented in this picture of the current state of visitation practices in the church today. Bishops and congregations are confronted with many obstacles that make “Oh, it’s you again” a real possibility every time they gather. The five factors which have emerged from this study present bishops and congregations with challenges to effective visitations.

The pattern bishops use for visitations has not been examined to determine if the elements of a visitation in fact aid congregations in their development efforts. Also, congregations and bishops must deal with a great deal of information in a small amount of time. When bishops and congregations examine these patterns, other ways of engaging in dialogue together may be found more effective.

The size of dioceses and the interval between visitations means that bishops and congregations are dealing with each other infrequently, making relationship-building difficult. Bishops in larger dioceses, particularly, need to consider creative solutions to maintaining ongoing relationships, given the longer intervals between visits.

When the communication that occurs before and following visitations is not connected to key purposes of visitations, the process loses an important ally for being effective. The liturgical details typically communicated about these visits are important, yet, when these matters are the central topic of discussion they can keep congregations and bishops from dealing with more substantive issues. Focused written material could be critical to the development of a healthy visitation.

The challenges present in relationship-building and the isolation of bishops, brought on by the lack of training and the failure to involve other diocesan personnel

further complicate visitation practices. Relationship-building is never easy but, by providing bishops with training and adding other voices to the conversation, bishops and congregations will discover new forms of support for their ministries.

I would suggest that, in part, these challenges are due to the rather wide agreement in the church on the nature of episcopal visitation. Suggestions for revision of these long-standing practices will meet with resistance.” Why do we need to change these practices?” the argument goes. “We all know what is expected of such encounters.” However, there are signs of hope in the survey material indicating change may be welcomed. The strong response to the survey suggests bishops are interested in and thinking about this topic, and a few bishops are trying new practices with some success. Episcopal visitations to congregations do sometimes become opportunities for the growth and development of faith communities, but this seems to be the exception rather than the rule.

It is the contention of this paper that what is needed is a new model for visitations that focuses the process on congregational growth and development. By changing the nature of the exchange between congregation and bishop it may be possible to have growth and development the norm rather than the exception to the rule. What if the structure of a bishop’s visitation invited a congregation and its bishop into a deeper level of engagement about mission and ministry? What would such a structure look like? How could a visitation be made in such a way that bishops and congregations utilized information about the mission of the congregation that could inform their joint discussion? What kinds of information would be helpful to all of the persons involved? These questions deserve critical thought and will lead us to a model for visitations that makes such conversations possible. In chapter two we will examine a model for episcopal visitations that will assist bishops and congregations in such a discussion of congregational development.

CHAPTER 2

A CONGREGATIONAL DEVELOPMENT MODEL OF VISITATION

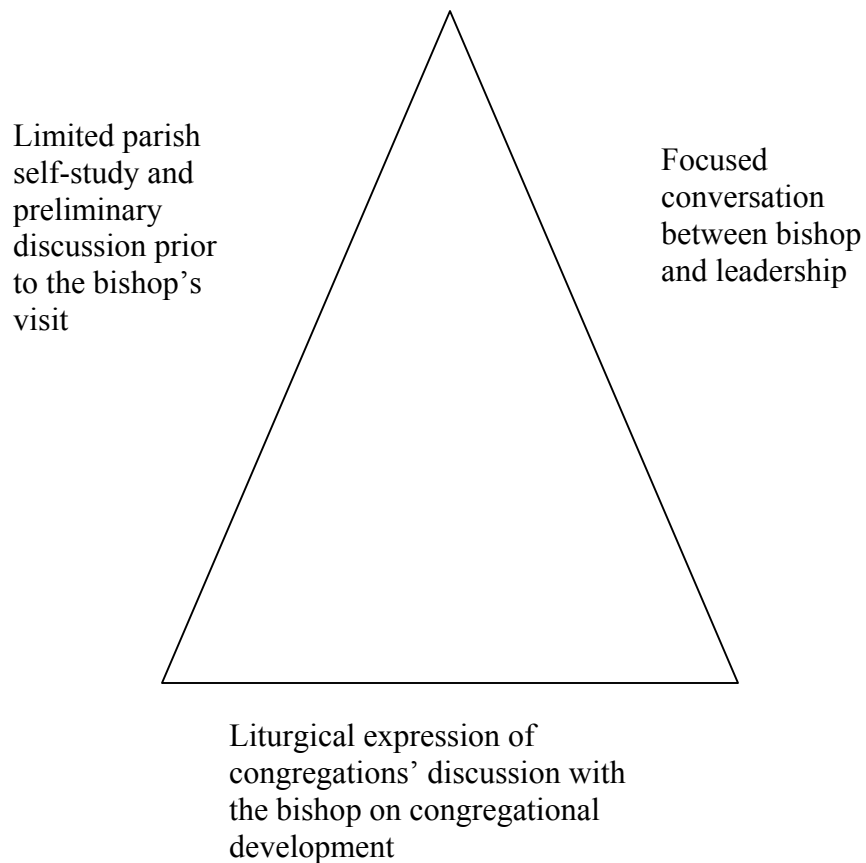


Figure 1

It is the contention of this paper that bishop's visitations will be opportunities for congregational development as three dimensions of congregational life are engaged: 1) prior to a visitation, congregational leadership should spend time in self-study and

mission discernment; 2) the visitation should include an intentional conversation between the bishop and congregational leaders concerning congregational development; 3) during the liturgy the bishop's sermon should include references to the discussion of congregational development held with the parish leadership. At times, other liturgical expressions might also be included that enable the parish to further its understanding of these matters. These three dimensions can be seen as points on a triangle which, when managed carefully, can help bishops and congregations move forward in ministry together (see Figure 1).

Conceptual Foundations of the Model

The first point to a healthy visitation is the congregational leadership's engagement in a self-study. While a full self-study process is not possible or desirable in a visitation setting, a short self-study can do much to begin the process of deeper reflection. Such a study will give the community clarity about who they have been as a people in the past, and who God might be calling them to be in the present, through a multi-level examination of key information.

Such a study will place the congregation in context as it is invited to consider the meaning of its recent financial history, attendance patterns, and the context of ministry through the use of demographic material specific to the parish and the community in which it lives. By engaging in a discussion of this material prior to the bishop's visit, the leadership is invited "onto the balcony"⁹ where they can see the entire dance floor of the congregation's life in a relaxed setting that fosters reflection and encourages new thinking.

Researchers in the church have for years understood the importance of the intentional study of congregational life. Leaders in the field of congregational studies have given to the church many lenses through which to view congregational life. These lenses have provided the vision through which many churches have traveled to successful ministry. Through a self-study, congregational leaders can get excited about God's call to

⁹ Ronald Heifetz, *Leadership Without Easy Answers* (Cambridge, Massachusetts: Harvard University Press, 1994).

ministry as they gain further clarity about who they are and who their neighbor happens to be.

Once a congregation has examined who they are and the mission field in which they live, the second aspect of a healthy visitation involves revisiting, or in some cases creating, the parish's mission and / or vision statement. Mission or vision statements are tools for articulating a parish's understanding of God's call to ministry. By discussing how these statements relate to the congregations life situation uncovered in the demographic material, congregational leaders can evaluate their goals and are, thus, in a position to move forward in ministry, confident about who they are and where God is calling them.

In order to understand how a conversation between bishops and their congregations, using the tools of a self-study and mission statement, can be an effective tool for growth and development, it is necessary to digress to a discussion about the history of mission. This discussion will support the contention that a congregation will benefit from reflection on its mission statement, in light of its self-study.

A central paradigm shift is taking place today that affects our understanding of the role of the church in society. According to David Bosch,¹⁰ the earliest days of the church's mission are marked by the visions of Paul, Matthew and Luke who saw the church sent out into the world by an eschatological vision of the future. The church, in this first age, saw itself called by God to invite people into a new world order, a way of life suitable for awaiting the return of Jesus at the end of time.

With the coming of Constantine, this conceptualization of the life of a faithful community changed. The church became an established center around which society revolved. The goal of mission shifted in the Christian centuries, away from an invitation into a new world order, to an invitation to join the Christian world. The church aligned itself with the state as the agent of mission, and conversion became synonymous with entrance into the dominant culture.

Today, the state no longer sees itself as an agent of Christian mission, and the church seems ripe for a return to a cultural role similar to the role it held in the first century. Bosch suggests that this situation allows the church to reconnect with its

¹⁰ Bosch, *Transforming Mission*.

eschatological roots. Seeing the community around the church as “enemy-occupied territory,”¹¹ the church can return to being a fellowship of love and prayer, working for the coming reign of God.

In a post-modern, post-Christian era, the church needs new eyes. Darrell Guder¹² expands the work of Bosch and articulates a theology of mission that takes seriously this call to be *in* the world but not *of* it. Guder’s missional theology calls for a church grounded in scripture, culturally diverse in its structures, and centered in local, particular communities.¹³ This vision of the church is consistent with the biblical witness, and thus, in order for the church to undertake such a vision, we need to be clear about who we are and what God’s missionary call entails. A bishop’s visitation centered on a self-study and the examination of the mission statement can assist a parish to begin the process of making this far-reaching change in its attitude and outlook.

The challenge is considerable. As Rodney Clapp has pointed out, we have lived in a Constantinian world for so long, with the church playing handmaiden to the state, that church leaders, both lay and clerical, are often rewarded for acting in concert with society.¹⁴ In order to meet this challenge, congregations will benefit from bishops’ visitations that invite them into a conversation specifically about their mission and the community in which they live.

The third dimension, of our model of episcopal visitations to congregations will reinforce the work accomplished in the first two aspects, and, thus assist a parish in grounding its vision in the reality of parish life. Having done a self-study, and compared the results with its mission, a congregation can now be invited to embody its learning in liturgy. The liturgy of the church is the principal expression of our self-understanding and mission to the world. As the early church believed that the gospel must be lived out as an alternative way of the world,¹⁵ so the church today is called to embody in liturgy who we

¹¹ Bosch, *Transforming Mission*, 506.

¹² Guder, *Missional Church*.

¹³ *Ibid.*, 222.

¹⁴ Rodney Clapp, *A Peculiar People: The Church as Culture in a Post-Christian Society* (Downers Grove, Illinois: InterVarsity Press, 1996).

¹⁵ Michael Warren, *At This Time, In This Place: The Spirit Embodied in the Local Assembly* (Harrisburg, Pennsylvania: Trinity Press International, 1999), 1.

are and what God's mission is for us. As parish leadership and bishop dream together the particular call of the community, they now need to consider how to embody their discussion in liturgy. Giving concrete expression to the parish's vision will help to insure its ongoing life in the congregation. The bishop's sermon during a visitation is a natural place for the parish as a whole to hear of the conversation taking place in the leadership circles of the parish. As congregations develop a clearer sense of their vision, a second place to express liturgically their call to ministry might be by writing of a collect for the mission of the parish during the meeting and including it in the Sunday service. Obviously, how this sense of mission is expressed will be unique to each parish setting and there are many other ways to proceed in this matter.

Testing the Model

We now come to the specifics of how to structure a test of the model envisioned above. Several issues need to be addressed in this discussion. These include what particular material will be collected, how it will be discussed and how the outcomes will be reported. First, vestry members will be invited to do a limited self-study and to hold a conversation on the material in the month prior to the bishop's visit. Second, the vestry and bishop will set aside time during the visitation for a conversation on this same material. Third, the conversation will be embodied to the congregation during the Sunday services, particularly during the bishop's sermon.

We begin with a discussion of data collection. Prior to the date of visitation, bishops normally contact the parish priest to make a variety of arrangements. Such a contact should include an invitation to work together in congregational development during the visitation. As it will be essential to invite the parish leadership into this process, it is here suggested that the clergy and lay leaders be invited to do their research before the date of visitation and to communicate their findings to the bishop prior to the visitation as well. Such communication will consist of sending to the bishop's office copies of the gathered data.

In order to assure that the work is manageable, the invitation should be clear that what is envisioned is a *limited* self study. The study should include accessing the National Church's website to allow participants to download financial and membership

data from the parish's parochial report.¹⁶ Also, accessing demographic material about the area in which the parish is situated from a company such as Percept, Inc.¹⁷ Specifically, something similar to Percept' Ten Facts and First View Reports¹⁸ are recommended. Alternate sources of demographic information might include the national census or local governmental agency reports. The Ten Facts Report provides participants with general information about the demographics of the community by zip codes (see Appendix E). The First View Report consists of more in-depth information on the community, including such issues as diversity and faith preferences (see Appendix F). Finally, the participants should be asked to provide an internal source of information about their current goals: the parish mission statement. A study of this material will provide the basis for discussions, both among parish leadership and with the bishop. By asking the clergy and lay leaders to do their own homework, all are empowered to invest in the process, and the workload is equitably shared.

An initial conversation about the self-study in the weeks prior to the bishop's visitation allows leaders to discuss their own reading of the situation and strengthens the voice of the parish for the later conversation with the bishop. The goal in this conversation is a deeper self-knowledge and commitment to mission discernment based on the information discovered in the self-study.

During the visitation, adequate time needs to be set aside for the conversation between the bishop and parish leadership so that all might benefit from the discussion. The bishop should carefully prepare for the encounter by reading the self-study and mission statement material prior to the visit. The bishop is advised to guide the discussion with the clergy and lay leaders using open-ended questions which invite conversation and reflection. Asking a question such as, what new insights were learned about the congregation from the demographics of the town in which the church is located will generate many comments.

If the mission field is, indeed, all around them, this discussion should allow the parish to see clearly how they have, or have not, developed a mission consistent with

¹⁶ The Episcopal Church USA, episcopalchurch.org.

¹⁷ Percept Inc. www.percept1.com.

God's call to that community. Prior to the visitation, a letter should be written to the clergy with specific suggestions on how to proceed with their discussion of the material with the vestry. The same set of questions can then be used by the bishop to open the discussion with the vestry during the visitation. During both conversations the participants can be invited to reflect on questions such as these: 1) What surprised you about the material you gathered and why? 2) What information, if any, was new to you? 3) What information do you believe to be the most important to the parish? 4) How does the parish mission statement connect with the material in the reports you gathered? 5) How might you, as a vestry, respond to the material you gathered? Following the visitation, a summary of the discussion prepared for the use of the bishop and congregation may potentially serve as a guide to the congregation's work in the year ahead and, also, as a starting point for the next visitation conversation.

Having proposed a congregational development model for use in episcopal visitations, it now becomes necessary to test this model in the field. The following chapters discuss the use of the model in two somewhat different Episcopal congregations that accepted an invitation to participate in this study. The churches were selected considering the convenience of the bishop's schedule and the needs of the project.

The first chosen, called St. Elizabeth's, in the study is a small congregation with a very new part-time rector. Using a congregation with new clergy leadership allowed testing in a congregation where lay participation in the life of the parish was high and where they had recently been engaged in discussions of mission and ministry in relation to the calling of their new priest. The second parish invited into the study, called St. Timothy's, is an older, established congregation with a significant history in the diocese. At present, it is a medium-sized parish in a rapidly growing suburb. This allowed testing in a congregation challenged by their history and the growth and development going on around them.

An invitation to a discussion about congregational development in the context of the bishop's visit was extended to the clergy and lay leadership at least a month prior to their scheduled episcopal visit (Appendix B). The invitation was accepted by the clergy after consulting with their vestry. After acceptance of the invitation, instructions were

¹⁸ Ibid..

written to each vestry member invited, describing the work needed to complete the self-study (Appendix C). Each member of the vestry did the research independently in the belief that this would gain the maximum amount of personal investment in the project. They agreed to spend time studying the results and then come together with their clergy, prior to the bishop's visit, to discuss what they had uncovered about the church's finances and attendance, the demographic information, and the stated mission of the parish. A copy of the financial and membership information, the Percept First View report for the zip code of the physical church building, and the parish's mission statement were sent to the bishop in the days prior to the visitation. In order to gather the widest degree of information, each participant uncovered demographic information about his or her home zip code, thus allowing comparison with that obtained for the church's zip code.

Following this work, each parish held its visitation with the bishop and included a discussion of the material studied. At the smaller congregation I was present for the discussion between the bishop and vestry, while at the larger congregation I was not present for that discussion. After the visitation, I returned to both parishes for an evaluation of the process with the participants in the discussion (see Appendix D). At the end of both processes, I interviewed the bishop to get his perspective on the tests. Chapter three will be devoted to a discussion of the results of the visitation to the first parish in the study. Chapter four will be devoted to the results of the second visitation.

CHAPTER 3

TESTING MODEL: ST. ELIZABETH'S

St. Elizabeth's Episcopal Church¹⁹ is the result of the merger of two smaller struggling congregations many years ago. Its recent history has been one of renewal, followed by several years of dislocation due to a short clergy tenure, followed by a long interim and the decision to hire a part-time priest-in-charge rather than a new full-time rector. The new clergyperson had only been in the parish for a few months at the time of this visitation. Expectations are high for this new venture and a good deal of enthusiasm exists in the parish at this time.

Eight members of the vestry met with the Bishop on the eve of the visitation while I observed and took notes of the meeting. One vestry member indicated that she had not been able to access the data and a set was given to her at that time. Three others indicated that they had been able to gather the data and to study it but had not been able to be present at the meeting prior to the visitation of the bishop, when the vestry and clergy discussed the material. The meeting with the bishop was two hours long and the discussion of the material they gathered took up the entire time.

The bishop began the discussion with the question: what surprised you about the material you were asked to assemble? A lively discussion was held on this question as the vestry noted how many different zip codes were represented in the study. The actual city in which the church is located is quite small and most of the congregation lives in zip codes close to that of the church but outside the limits of the city in which the church is located. The surprises included a new awareness of the economic range represented in the demographic area and the number of single-parent families in the area. This wide-ranging discussion led to an awareness of the differences between the makeup of the parish and that of the area around the parish. Speculations were offered about how the parish might respond to these realities to invite others into the community. While the discussion was lively, no concrete decisions were made to move forward on any of the suggestions.

¹⁹ The names of the congregations have been changed to provide anonymity so that as candid a conversation as possible could occur.

There were some challenges during the meeting in using the material they had uncovered. At several points in the discussion, a question arose about the particular meaning of a term in the demographic material. The fact that they did not have answers to these questions made it more difficult to see clearly the situation they were in. Access to this material prior to the visitation would have made for a better discussion.

About midway through the discussion, the bishop directed them to the parish mission statement and asked how reflective it was of their self-understanding. This led to a discussion the history of the statement and, ultimately, to the realization that it had several problems. It was too long and could not be memorized. It was in the passive voice and “doesn’t get to me,” one member noted. The bishop suggested that, rather than spending time writing a new one immediately, they might live into a new statement in the year ahead. Toward the end of the discussion, the bishop asked about where they had energy at this time. He wondered what they wanted to do. He invited them to consider three things: the energy they have, the resources they can gather, and the faithfulness they will need to move forward as a community. This led to a discussion of these issues and culminated in a question to the bishop about what churches in the area are growing. It was my sense that this question and the bishop’s answer were a direct result of having spent the past two hours in a focused discussion of congregational development issues.

The bishop named several specific churches in the area and indicated that their growth seemed related to one or more of the following reasons: 1) The church was passionate about something, like social justice; 2) the church had made a public commitment to grow; or 3) the church served a unique population that gave it a ready population to target in its evangelism. As the meeting broke up, several side discussions started concerning aspects of the meeting and next steps.

My conversation with the new rector following the visitation revealed a general impression that using the congregational development model had been helpful to her and to the congregation. Of particular importance to her had been the conversation she had with the vestry prior to the bishop’s visit. During that discussion, they were able to clarify further issues they currently face as a congregation. Her relative newness in the community made the demographic information particularly helpful to this conversation.

She and the vestry were able to get a better sense of each other through the conversation on area demographics. What took place in this initial conversation between clergy and vestry may have been similar to what should happen between the bishop and vestry. The vestry's subsequent conversation with the bishop was almost unanimously seen as helpful, but less so than the prior conversation between clergy and vestry. The excitement of their new relationship may have made the bishop's visit seem something of an anticlimax. The center of the conversation with the bishop was the parish's future, which seemed less of a reality than their discussions of the current parish situation.

Personally, I found the final minutes of the bishop's conversation with the vestry potentially quite helpful to the congregation moving forward. As the meeting came to a close, someone asked about growing churches and the bishop's response was insightful. In sharing his sense of the reasons certain area churches were growing, he was inviting them to consider how God might be inviting them to grow as well.

In my conversation with the bishop following the visitation, I was interested to discover if the bishop felt the visitation model was effective and, if so, how. The model's use, the bishop said, seemed to give him a way into the life of the congregation, and to encourage a deeper conversation than is normal during a visitation. He left feeling he had a better sense of the challenges faced by the congregation. The bishop found the material sent by the parish to be helpful in preparing for the conversation. For the bishop, the discussion was more interactive and lively and, as such, kept everyone interested.

In the end, by challenging the congregation to engage in this work, the bishop's visitation became a helpful vehicle for congregational development. As St. Elizabeth's continues to develop, it will be interesting to see if this encounter with the bishop becomes a first step toward revitalization. The work is clearly up to the parish, but this conversation, coming as it did at the beginning of a new pastorate, might be just the stimulus needed for a concerted effort in parish development. Were the bishop or another diocesan official to visit in one year's time, it would be good to revisit this material and to invite a further discussion of parish growth and development. A clear and consistent message regarding growth and development from the bishop's office will help to keep the church on track and foster further conversations concerning the direction the parish is headed.

CHAPTER 4

TESTING MODEL: ST. TIMOTHY'S

St. Timothy's Episcopal Church was the second congregation visited by the bishop during the study. This particular parish has a long and complicated history, and it was this history, and the fact that the parish and diocese had an ongoing disagreement concerning the parish's financial giving to the diocese, that made this a good test of the congregational development model in a bishop's visit. Would the use of a conversation specifically focused on congregational development help bishop and congregation as they struggled together with these issues?

The congregation began life in an urban setting but relocated many years ago in the suburbs. Following the move, the parish faced a series of challenges; currently it's an inability to effectively grow while situated in a high growth suburb. Everyone agrees that the parish should grow, yet no one seems to be able to say clearly why that is not happening. While the bishop's visitation should be a time to discuss such issues, the misunderstanding involving the parish's diocesan assessment might derail that discussion.

As part of an attempt to grow several years ago, the parish decided to spend a portion of its endowment funds to hire an assistant priest to strengthen children's ministries. This decision was made on the assumption that the diocese would not consider that expense in calculating the parish's diocesan assessment. The bishop and finance department of the diocese, on the other hand, were not aware of any agreements with the parish and continued to assess them in the normal way. With tension in the air, our process began.

The vestry did its homework on demographics and came together, a few weeks prior to the visitation, to discuss the material. Most of the members of the vestry were able to access the material and found it reasonably easy to obtain. A few members did not access the material at all and one found the process difficult. Most of those who did gather the material found it fairly helpful. The material did not uncover demographic information the parish was unaware of, and the most frequent comment about the

material was that it confirmed and verified what they had felt was true about their geographic area. The material suggested that they were on the right track concerning the types of programs they should be offering to the people most likely to come to their church.

Realizing that they had made good strategic decisions about their direction, the vestry then began to discuss how to have its discussion with the bishop during the visitation. The demographic material, they said, helped them organize for the visit. It allowed them to identify important issues to share with the bishop and to come to a consensus on questions they wanted to ask. One member of the vestry indicated that the meeting prior to the visitation was more candid than other vestry meetings. Leaders felt that by presenting this information to the bishop and showing how they were responding to their situation, they would be in a good position to make their argument concerning their decision around the diocesan assessment. The rector felt the conversation with the vestry went well and that the demographics allowed them to plan their meeting with the bishop. They could use the demographics to show that they had a defensible growth plan. In fact, the discussion on demographics seems to have given them a better understanding of the issues facing them, including the misunderstanding with the diocese.

During the visitation, the bishop listened as the parish made its case concerning the demographic material. They were able to highlight the successes they have had and to let the bishop know what they were proud of. In past visitations, several members of the vestry had experienced the bishop and diocese as “coming in with an agenda,” but this time that was not the case. Rather, they experienced the bishop as listening well and as being able to reflect back, during his Sunday sermon, what he had heard from the vestry discussion.

Throughout the discussion some movement was made on the diocesan assessment issue. The vestry was able to explain its position and the bishop clarified diocesan concerns. While no decision was made concerning this issue, both bishop and vestry felt that progress had been made. Overall, the parish experienced the visitation in a more positive way than in the past. They indicated that the bishop was able to give them a new perspective on the generosity of their members and on how to make their church more

welcoming. The discussion was experienced as engaging, with at least some of the vestry reporting that they felt they knew the bishop better following the encounter.

When asked for ways in which the visitation had not been helpful, the vestry spoke of how no clear directions or next steps came out of the meeting. They noted that the discussion had not turned into action yet, and they were unsure if the meeting had made a difference in the way the bishop viewed the parish. For his part, the bishop indicated that he did feel he knows the parish better for the conversation and he felt good about the progress made on the issues. He felt that more talks were necessary because the time frame had not allowed them to get down to the bottom of the issues they faced.

While both bishop and vestry felt good about the visitation and the use of demographic material, it seems clear that the issues concerning parish finances did keep them from making more progress on the deeper issues of congregational development. However, it may well be that the conversation that occurred was the one that needed to happen before other work could be done. As the congregation moves forward, it will be interesting to see if the interactions that took place during the bishop's visit enable the parish to get back on track with its growth plans. Dealing with the deeper issues of why the parish has been unable to grow, even with a strategic plan for growth in place, will not be easy. There are deep historic reasons for this problem and no solution will be simple.

The situation at St. Timothy's is similar to that faced by many churches. Congregations exist as a complex web of relationships and bishops visiting these institutions find themselves thrust into that web with little guidance concerning how that specific church deals with the forces that challenge them. Most churches, like most individuals, have developed good defense mechanisms. They respond to threats and are able to maintain long-established rules of behavior even when those behaviors have become counter-productive to the institution as a whole. Institutional change is never easy, and so it would be unusual to find that a single visit made by the bishop can create any high degree of transformation. Yet, it is the position of this paper that when bishops and congregations gather and discuss these issues using a congregational development model, change is facilitated.

The balance of this paper will address the implications to be drawn from this study. At issue are fundamental understandings concerning the role of the episcopate in congregational life. If bishops are to cultivate a helpful role in parish life, they will need to discover ways to engage in the life of faith communities that encourages those communities to look carefully at their situations and to deal with the problems they face. If they do not succeed in this work, bishops will find that congregations continue to view them and their episcopal visitations as a distraction from normal parish life. “Oh, it’s you again” will continue to be the dominant expression of a parish’s feelings for these encounters.

CHAPTER 5

IMPLICATIONS FOR PRACTICE AND FUTURE RESEARCH

It is impossible to draw definitive conclusions from the research done to date and testing of a model in two congregations. The research suggests, however, areas for further study and ways in which such a model might be helpful to the life of the church. This paper argues that a conversation on congregational development between bishops and congregations, during episcopal visitations, will benefit the church as a whole. In this chapter we will explore the societal challenges that call us to this work at this time, the implications and benefits of using this process in practice, and how this model is being used in a diocese currently.

In *Transforming Mission*, David Bosch makes a clear and convincing case that a major paradigm shift has occurred in the church and, indeed, in all of western culture. “The church (has) lost its position of privilege. In many parts of the world, even in regions where the church has been established as a powerful factor for more than a millennium, it is a liability rather than an asset to be a Christian.”²⁰ The Constantinian connection between the church and the state has been broken. In a world where the state has no perceived need to give the Christian church a place of privilege, the church is compelled to reconsider its place in society. This idea has spurred considerable discussion among scholars in the field of congregational development. Rodney Clapp, in *A Peculiar People*, describes it this way: “Just when the western inventions of capitalism, democracy and modernity reign over or are aspired to throughout the world; just when some declare that the West has won and history has reached its goal; just when America, the leading and pioneering capitalist, democratic and modern nation becomes the world’s sole superpower; just now the church is informed that its sponsorship is no longer needed or wanted.”²¹ Darrell Guder agrees: “Rather than occupying a central and influential

²⁰ Bosch, *Transforming Mission*, 364.

²¹ Clapp, *A Peculiar People*

place, North American Christian Churches are increasingly marginalized so much so that in our urban areas they represent a minority movement.²² This shift indeed has wide ranging implications for the church today.

If the social structure does not require our existence, then the church is free to challenge and critique the wider community to a larger extent than before. It has been said that “religious groups, such as the church, are actually cultures within wider cultures. They are zones of meaning prompting their adherents to question the meaning of the wider culture.”²³ If the church is to take seriously this new position in society, then local assemblies of Christians must be encouraged to understand the new mission field at their doorstep. Conversations on congregational development can be a primary place for such discussions at the local level. The central challenge for leaders in the church today is how to manage the rapid changes that are occurring. “Leadership,” says Ronald Heifetz “is about engaging people to make progress on the adaptive problems they face.”²⁴ Adaptive change, he explained, “consists of the process of discovering and making changes in people’s attitudes and behaviors.”²⁵ Adaptive change is never easy, because it requires us to take seriously the situation we are really in and to alter, at times, long established patterns of thought and behavior. It is the contention of this paper that bishops in the church today are in a unique place to assist churches in their adaptive change efforts and that bishops’ canonical visitations to congregations are essential to this work.

Before moving on to a discussion of the benefits of a congregational development model for episcopal visitations, one issue only slightly touched on in this study needs comment. This concerns the role of confirmation during a bishop’s visit. While the survey did not ask if confirmation was included in a parish visitation, a review of the material finds that half of the bishops responding to the survey specifically indicated including confirmation as a part of a visitation weekend at least some of the time.

²² Guder, *Missional Church*, 2

²³ Warren, *At This Time, In This Place*, 1

²⁴ Heifetz, *Leadership*, 187.

²⁵ *Ibid.*

Table 7. Bishops and Confirmation

| | |
|---|----|
| Indicated Confirmation is part of visit | 25 |
| Indicated Confirmation is not part of visit | 4 |
| No indication of Confirmation practices | 23 |

Some of the bishops who support the practice of parish confirmations believe that it is helpful to the community to experience this rite in the context of a Sunday morning Eucharistic service. Others indicated that they had encountered resistance to stopping the practice of confirming individuals in a parish setting and continued to follow the practice that was in existence in the diocese when they arrived. A vocal minority of bishops are opposed to doing confirmations during parish visitations. Those bishops who are opposed find that confirmation detracts from the energy they need to challenge the parish in other ways. They also point out that doing regional confirmations are a good way to bring churches together for common worship. One bishop indicated in a phone interview that the initial response to eliminating confirmation during visitations was high but that, over time, the majority of parishes have come to accept the practice.

The research suggests that, at the very least, care needs to be taken when including confirmation in a weekend visitation experience. The time and attention it takes to insure that confirmation has the integrity it needs does indeed make it more difficult to find the time necessary for a quality conversation on congregational development. It is the opinion of this researcher that, where possible, bishops should consider eliminating confirmation from the yearly visitation of congregations. Where that is not possible or desirable, attention should be paid to connecting confirmation with the conversation on congregational development thereby highlighting the connection between confirmation and the mission of the church.

Congregations today need to be engaged in the process of adaptive change in order to face the world of the future; yet local churches tend to continue in what they have always done unless forced by changes in their environments. Rabbi Edwin

Friedman applied family systems theory to churches and synagogues in *Generation to Generation*²⁶ to show why it is that these institutions continue in their behaviors over generations. While there are real and exceptional places where adaptive change happens in a parish due to clear planning, in most places change is normally driven by sheer necessity. The church today can ill-afford to be like a business that keeps doing the same thing year in and year out without looking to innovation. We have seen too many businesses and church communities like this that have ceased to exist.

There are hopeful signs of the work of God's Spirit in the church today concerning bishops' visitations to congregations. Some bishops have begun to ask more of the people they serve and they are, themselves, giving more to those same congregations. The response rate for the survey used in this project indicates that many bishops are aware of the importance of this topic and ready to respond with their own insights born of years of experience in the field.

Other signs of hope include the emergence, during the last twenty years, of an entirely new field of study on congregational life. Degrees in congregational development are being offered in various institutions across the country and bishops are hiring the graduates of these programs to work as experts in the field. By learning more about the growth and decline of congregations, we are gaining knowledge about the adaptive changes what will be needed in the future.

The results of this study suggest that an intentional conversation on congregational development between bishops and congregational leaders, during the time of an official visitation, may have many benefits for the church at this time. First, such discussions may tend to shorten the time it takes for bishops and congregations to get to know each other early in a new bishop's tenure. As the development of trust in one's leaders is an essential part of doing adaptive change work, this will mean that bishops will be in a position earlier to be of help to a congregation that is experiencing difficulty. Churches that know and trust their bishop are more likely to ask for help when they need it and before problems get unmanageable. Parishes and bishops who come to know each

²⁶ Edwin Friedman, *Generation to Generation: Family Process in Church and Synagogue* (New York, New York: The Guilford Press, 1985).

other very well will also be less likely to play unhealthy games with each other, as it is harder to do so as intimates.

Second, if bishops meet yearly with their churches, or find a way in the bigger dioceses to share this oversight function, then their intentional discussions of congregational development will, over time, provide more accountability for planning and growth on the parish level. While the research was not designed to discover if a yearly visitation was preferable to other timetables, I would suggest that this standard, which is equivalent to the yearly review process used in many secular institutions, is the goal to which the church should be striving. A yearly evaluation helps people remain accountable to the work they say they will accomplish.

A third benefit from these conversations is a sustained conversation over time. All too often in parish life we move from one crisis to the next and from one project to the next without continuing a sustained conversation about things that matter over time. By having bishops and congregations discuss similar data from year to year, a deeper sense of the value of the information can be achieved. Congregations change leadership on a regular basis, thus, a sustained conversation over time will have the effect of making local communities more aware of the adaptive change issues they face and less likely to sabotage such efforts.

A fourth benefit to the church is the potential for deeper conversations in vestries and between congregations and bishops. In both of the congregations used in this study, comments were made in the evaluations concerning the depth of these discussions. In both instances, the bishop also reported a sense that the conversations were clearer and more focused than usual. The discussion of the demographic material and mission statement invited both bishop and vestry into serious consideration of the parish's vision and mission.

Finally, an intentional discussion of congregational development as outlined in this research will shorten the time it takes a congregation to do adaptive work. Adaptive work is difficult and ways to avoid this work are legion.²⁷ However, as congregations meet yearly with diocesan representatives on these matters, the time it takes

²⁷ Ronald Heifetz and Marty Linsky, *Leadership on the Line: Staying Alive Through the Dangers of Leading* (Boston, Massachusetts: Harvard Business School Press, 2002).

congregations to adapt to changing environments should be reduced. As parishes gain the skills necessary to do this work, they will naturally get better at adapting to change. By nurturing congregations through the use of an intentional discussion of congregational development, parishes will create an atmosphere where change and innovation are the norm and not the exception to the rule. As congregations are able to deal successfully with the adaptive challenges they face, they can come to view change and innovation as good things to be sought after rather than unwelcome strangers to be avoided. “Oh, it’s you again” will be heard less and less often in local congregations as bishops make their annual visitation an occasion for real dialogue about the serious issues the church faces today.

In the Diocese of Minnesota, a conversation is underway concerning the implementation of this process of Episcopal visitation. The conversation began after I reported the results of the process piloted in the two congregations. With the bishop’s consent, I initiated discussions with the three canon missionaries of the diocese, simply indicating that a new process had been tried with some success. These discussions led to a meeting of the missionaries, the bishop and me to explain the model in more detail and examine whether it might be useful on a wider basis in the diocese.

The meeting began with a short summary of the model as outlined in this work. A four-point process was outlined as follows: 1. Vestry members are invited to gather demographic data on the parish. 2. The vestry meets to discuss the data together prior to the scheduled visitation. 3. The vestry sends the bishop a copy of the relevant data. 4. The vestry and bishop meet during the visitation to discuss the data.

Following this introduction to the work, the missionaries were invited to share their thoughts and concerns about the proposed process. Three primary issues surfaced. One missionary questioned whether this process should be mandatory for all congregations or if, in some instances, it should be an option only. The main concern in this instance was with those congregations that were not ready to be challenged by such a process. It was noted that congregations in distress and/or transition would do well to have a conversation such as this with the bishop, but in some instances this process might be optional. This question was ultimately understood to be one concerning accountability and how to challenge churches, especially when leadership proved resistive to change.

The bishop noted, “The advantage of this model is congregational self-knowledge. They can discover in this process things they will not hear from us.”

The second issue examined whether the conversations with congregations should be done in connection with the bishop’s visitations alone or also in connection with missionaries’ own visitations with congregations. One missionary said, “What I find is that people are reluctant to tell the truth with the bishop present. If this can be a tool for people to come clean with the bishop, that would be a good thing. It really makes it difficult when everyone puts on their party hats when the bishop arrives and refuses to do the griping they feel free to do when I am there. It hurts my credibility.” Another missionary noted: “I would love to use a process like this when I make a visitation. Otherwise I feel like a supply priest when I am there.” This issue was extensively explored during the remainder of the meeting, but at the present time, no decision has been made to use the model outside the bishop’s visitation schedule.

A third concern voiced in the discussion was about outcomes. A missionary stated, “I have no question that lay people researching their own parish situation is valuable, I just want to make sure that we do something with these conversations after they are done.” She added, “What changes will occur in the congregation because of this conversation? What will be held up as good and continued?” This issue was viewed as critical and discussion continued on outcomes throughout the meeting, finally issuing in a decision to add a step to the end of the process that will be discussed below.

Out of the missionaries’ concerns with accountability, outcomes, and truth telling revisions to the process emerged. During the discussion the bishop suggested the following analogy: In counseling individuals, there comes a point at which they decide to make a change in their lives. The next time you meet, however, they have done nothing to change their situation. Further conversation leads to another idea for potential change, which is again not acted upon. Ultimately, if this pattern continues, you might get to the point of suggesting they see someone else since they are making no progress toward health. In the same way, we need to continue to ask congregations what they are doing about the situations they are in. “This model,” the bishop suggested, “provides healthy information and challenges congregations and that is a good thing. We need to find a way to continue to invite them to growth and development.”

As a way of dealing with all of these issues, a further step in the process was discussed. The group suggested that the bishop expand his current practice of writing up a summary of the discussions with parish vestries to include sharing that report with each vestry member and the canon missioners. Over time, these summaries can become a way of tracking the progress of congregational growth in each church community. It seems likely that change and development in this process will occur as we gain experience in conducting these visitations. It is hoped that this process will continue and that, because of this work, more congregations will welcome the arrival of our bishop for visitation with the expectation that something good will result for the health of the church.

As the meeting was coming to a close, it was agreed by all that some sort of pilot project should be continued. As the bishop looked at his visitation schedule and the missioners wondered how this change would relate to other ongoing conversations about congregational development currently occurring in the diocese, a plan took shape. Each missioner agreed to find two congregations in the diocese who would be good candidates and who were having visitations with the bishop in the next four months. Visitations with these congregations using the model outlined in this paper will begin shortly and an evaluation meeting will then be held to assess the usefulness of the process in the diocese and its further use.

I believe this work to be just the beginning of a conversation in the church about bishop's visitations to congregations. These are critical times for the church and congregational development needs to be at the forefront of the work we are engaged in. The model here described provides a level playing field for bishops and vestries where critical conversations concerning growth and development can occur for the good of the entire church. I look forward to the continuing conversation.

APPENDIX A

July 20, 2004

Sisters and Brothers in Christ:

I write to commend to you the D.Min thesis work being done by a cleric in the Diocese of Minnesota. The Rev. Michael Hanley has been a member of this diocese for fourteen years and has served two parishes as rector and aided them in transformation and growth. In addition he has served the diocese extraordinary well on Diocesan Council, Standing Committee and Congregational Development to name the most important areas of diocesan life. Currently Michael is a D. Min student in Congregational Development at Seabury-Western. As a part of his doctoral work he is doing research on Episcopal visitation practices and has prepared a short survey of current visitation practices.

Michael is hoping to discover the current state of such practices and to discuss ways in which parish visitations can be opportunities for congregational development. He and I have had several conversations about this subject and I am very pleased and excited that he is willing to tackle this subject. Perhaps your experience is like mine- that visitations were something for which we received little or no training and only anecdotal examples. I believe that for us to be effective in congregational transformation (which is a primary need in our work) we need to be ever more aware of what we are intending and ever more skilled in helping it to happen. I hope you will take the time to complete and return the survey included with this letter. (The survey is also being sent electronically and can be responded to by e-mail for those who prefer that method of communication).

You get a bonus if you participate: a copy of the final thesis will be given to all bishops who participate in the study. It is my hope that Michael's findings and recommendations may be useful in one of the courses of the College for Bishops. This topic concerns an important part of our common ministry I trust its findings will be of interest to most of us.

I thank you in advance for your participation in this work.

Faithfully in Christ,

The Rt. Rev. James Jelinek
Bishop of Minnesota

SURVEY QUESTIONS SENT TO ALL DIOCESAN BISHOPS

A SHORT SURVEY OF EPISCOPAL VISITATION PRACTICES
SEABURY-WESTERN THEOLOGICAL SEMINARY
RESEARCH FOR THE D.MIN THESIS
THE REV. MICHAEL HANLEY

General instructions:

The following survey is being conducted in order to discover some of the most effective practices currently being used by Bishops in their official visitations to congregations. It is deliberately short. The first questions can be answered in a few words. The final five questions are more open-ended and will require longer answers. Following data collection I will be doing follow-up interviews with selected bishops. At the end of this survey there is a place to indicate your willingness to be interviewed by me for about one hour.

Thank you for your time and attention to this survey. Those bishops responding will be provided with a copy of a summary report of the findings. Please be assured that your name will be used for contact only, your responses will remain anonymous.

The Rev. Michael Hanley
St. Christopher's Episcopal Church
Roseville, Minnesota

General information:

1. Diocese _____
2. Your name _____
3. The number of congregations in the diocese _____
4. The number of years you have served as a Diocesan Bishop _____

Please provide short answers to the following questions

1. How often, on average, do you make a formal Episcopal visitation to the congregations in your diocese?
2. Approximately how many hours do you spend in/ with the congregation and clergy during an Episcopal visitation?

3. Do you send any material to congregations prior to the visit with your expectations for the visit? _____ yes _____ no if yes, may I request a copy of these materials for use in the work? _____ yes _____ no

4. Are there any follow-up documents created following the visitation? _____ yes _____ no _____ sometimes if yes, may I request a sample of such documents for use in this work? _____ yes _____ no

5. Are other diocesan personnel involved in the visitation? If so, When, who and how are they involved?

Please answer these open-ended questions at some length. (You are encouraged to use additional paper where necessary.) Please write legibly.

1. What, if any, training or guidance did you receive in how to make an official Episcopal parish visitation?

2. What, in your view, is the purpose of these visitations?

3. Describe, in narrative form, the structure or form of a typical visitation.

4. Describe the most challenging dimensions of your visitations.

5. Describe the most rewarding dimensions of your visitations.

Would you be willing to meet with me for a one-hour person to person or phone interview?

_____ yes _____ no

If yes, what is the best way to get in touch with you for a follow up interview?

APPENDIX B

LETTER WRITTEN TO PARISH VESTRIES

Dear Members of Vestry:

I write to you at this time to ask for your assistance in my doctoral thesis project on bishop's visitations to congregations. My central question concerns how a bishop's formal visitation to the congregations of a diocese might be opportunities for congregational development.

To date I have spent three years studying the field of Congregational Development at Seabury-Western Theological Seminary and I have surveyed the Bishops of the American church concerning their current practices in visitation. Out of this work I have developed what I believe to be a healthy model for the visitation of a bishop to a congregation. Now it is time to test this model in the field and I am asking you to allow Bishop Jelinek and I to conduct your upcoming visitation using the model I have created.

If you are willing to go forward with me in this work, you will be asked to do a little homework prior to the visitation. The homework consists of having Vestry members do a little data gathering and then come together to discuss that data prior to the visitation. You will also be asked to send the data you have collected to the Bishop prior to the visitation. The data is easy to access by the web and will, I believe, give you a quick snapshot of your current situation in Congregational Development terms.

During the visitation you will then engage in a specific discussion of the data with the bishop. This discussion should be a time of greater clarity for all concerned about the parish's capacity for Congregational Development. Then, on the Sunday of your visitation, there will be an opportunity to liturgically celebrate the work you have done together. Finally, I would like to do a post visitation interview with the vestry to determine the effectiveness of the model.

I thank you in advance for your consideration of this request. Should you have specific question I would be more than happy to answer them. I am hopeful that this work assists Bishops and congregations in the development of better visitation practices in the entire Episcopal Church.

Yours in Christ,

The Rev. Michael Hanley

APPENDIX C

INSTRUCTIONS TO PARISH PRIESTS ON CONDUCTING
PRELIMINARY VESTRY DISCUSSION

Dear Members of the Vestry:

Congregational development is about being effective in ministry at whatever size you are. While being effective can be evaluated in many ways a key element in this work involves a parish knowing itself and its community. In an effort to assist you in this work I am inviting you to do a little homework prior to the Bishop's visit and then to have a discussion of congregational development with the bishop during his visitation.

Your homework involves accessing four pieces of information:

6. Every member of the vestry should go online to the national church's website at www.dfms.org and access congregational information about demographics, church attendance and financial giving. To do this, go to the website, and click on leadership resources from the right side of the page. Then click on congregational development and support from the left-hand side of the page. Click on Study your congregation and community. Select your diocese then select your church. Get a zip code profile and a church chart. These will be two of the important documents you use in your discussion together and with the bishop.
7. Have someone do a graph of average church attendance for the past two years in order to fill in the 2003 and 2004 data missing from the national church report.
8. Get a copy of the church's mission statement.
9. Go to www.link2lead.com. On the initial page there is an invitation for those new to link2lead. Click here to get started. Once registered to Minnesota and your parish click on "My community" on the top menu bar. This will invite you to explore your community by zip code. Enter the zip code for your home address. You will be invited to take a 30 second quiz, do so. After that you should get a single page Ten Fact's report. At the bottom of the ten facts report you should see an invitation to learn more about a six page First View Report. Click there and get a first View Report. At the end of this process you should have 2 reports, a single page 10 facts report and a six-page first View Report.

With this information in hand come together for an hour as a vestry and discuss this data as it relates to congregational development. Specific questions might be the following:

From the Ten Facts report,

What surprised you and why?

What information was new for you?

Which of the ten facts do you believe to be the most important for your evangelism efforts?

From the participation and giving trends report,

What, if anything, surprised you about the report?
Does the report suggest the church is growing, stable, or declining?

From the First View report,

The first two pages of the report give leading indicators concerning population trends, diversity, community issues and faith preferences. What information surprised you? Did you see yourself in the indicators? Is there a group in the study area you might consider reaching out to in the future, perhaps one not already represented in the parish?

From the First View report,

The last three pages are detailed reports on the same leading indicators above. As you read the questions and the answers you should discover the population trends, community diversity, issues of concern and the extent to which there is potential for parish growth. This should lead to some generalizations regarding the potential for congregational growth and development. What are some of those generalizations and what do they say about potential parish programs going forward?

From the Mission Statement:

Does the parish's Mission Statement connect with the material in the Ten Facts and/or First View reports? Should the Mission statement be changed to reflect any of the new realities found in the participation and giving trends report? Finally, given the information you have gathered and the conversation you have had do you see ways in which you need to change as a vestry or as a congregation?

During the Bishop's visit you will be invited to spend some of your time together with the Bishop having an intentional discussion of the information you have gathered and your interpretation of that data. It is my hope that this conversation will assist you and the bishop to understand your particular parish situation better. I believe that it is through such understanding that intentional plans for congregational development can be formed.

Thank you for your participation in this project. I hope it is helpful to you individually and to the community you serve. If you have trouble with these instructions please let me know. I can be reached at 651-633-4589 during the day or by e-mail at The Rev. Michael Hanley

APPENDIX D

EVALUATION FORM USED BY PARISHES
FOLLOWING VISITATION

Evaluation form

Thank you for agreeing to be a part of this study of Episcopal visitation practices. Your answers to the questions below will assist me in evaluating the process I am proposing for a congregational development component to visitations.

On a scale of one to ten, how difficult was it to access the various online documents. (One indicating, no difficulty and ten indicating, an inability to access the information at all. If it was difficult can you indicate what the problem was?)

| | | | | | | | | | | |
|------------------------------|---|---|---|---|---|---|---|---|---|----|
| 10 facts report | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| The first view report | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Participation & Giving chart | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

On a scale of one to ten, how helpful were the various online documents? (One indicating, not at all helpful and ten indicating, extremely helpful.)

| | | | | | | | | | | |
|------------------------------|---|---|---|---|---|---|---|---|---|----|
| 10 facts report | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| The first view report | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Participation & Giving chart | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

In the space provided below please indicate what you found most helpful about the online documents.

In the space provided below please indicate what you found least helpful about the online documents.

On a scale of one to ten how helpful was your conversation prior to the bishop's visit?
(One being, not at all helpful and ten being, extremely helpful.)

Conversation prior to 1 2 3 4 5 6 7 8 9 10
visit

In the space provided please indicate what was most helpful about your conversation together prior to the visitation.

In the space provided please indicate what was least helpful about your conversation together prior to the visitation.

On a scale of one to ten, how helpful was your conversation with the bishop? (One being, not at all helpful and ten being, extremely helpful.)

Conversation with the 1 2 3 4 5 6 7 8 9 10
Bishop

In the space provided, please indicate what the most helpful aspect of this conversation was.

In the space provided, please indicate what the least helpful aspect of this conversation was.

APPENDIX E

SAMPLE COPY OF PERCEPT TEN FACTS REPORT

APPENDIX F

SAMPLE COPY OF PERCEPT FIRST VIEW REPORT

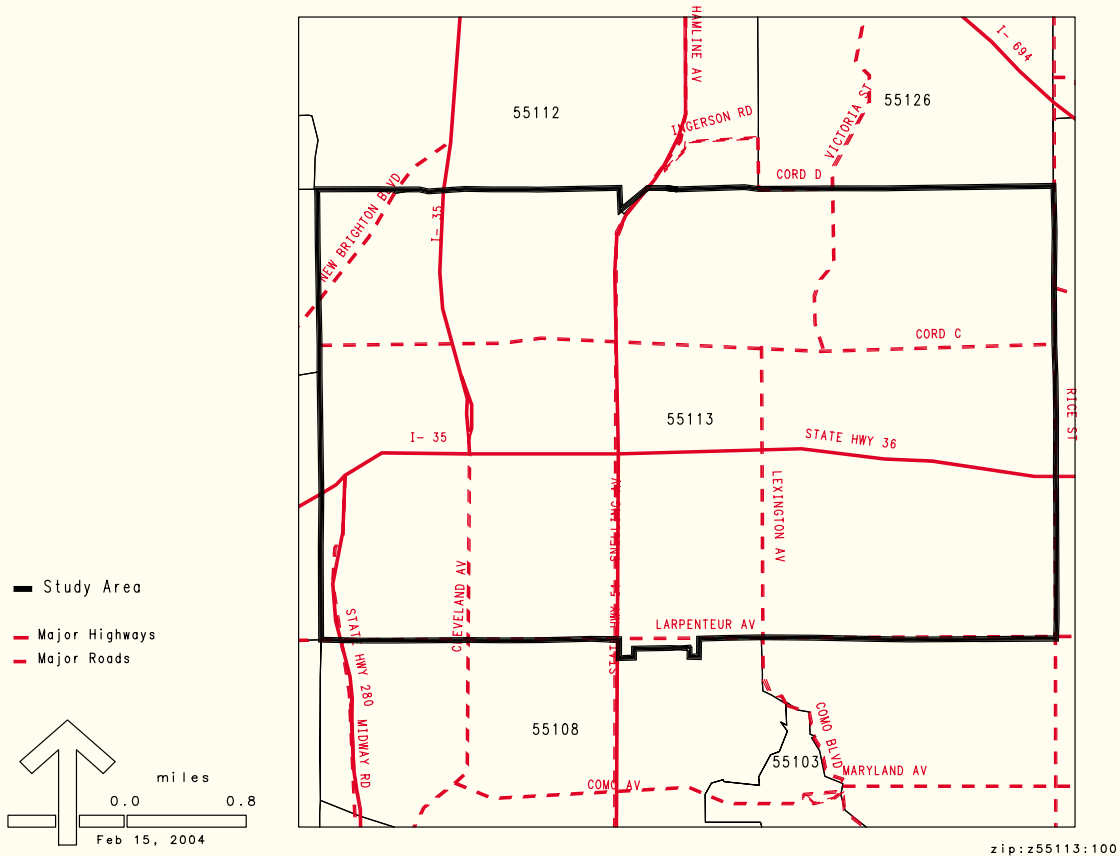
People and Place ... pgs 2 & 4

Community Issues ... pgs 3 & 5

Faces of Diversity ... pgs 2 & 4

Faith Preferences ... pgs 3 & 6

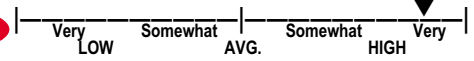
Study Area with Zip Codes



People and Place

P1 PROJECTED POPULATION DENSITY

VERY HIGH



P2 PROJECTED POPULATION CHANGE

STABLE



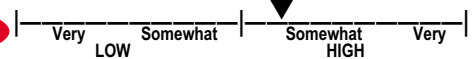
P3 POPULATION DISTRIBUTION

HIGHLY DISPERSED



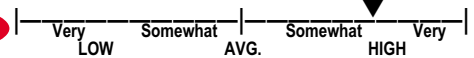
P4 DIVERSITY

SOMEWHAT HIGH



P5 AREA DYNAMIC LEVEL

VERY HIGH



Faces of Diversity

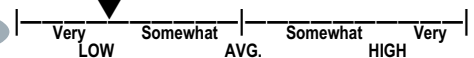
D1 U.S. LIFESTYLES GROUP

YOUNG AND COMING



D2 NON-ANGLO POPULATION

VERY LOW



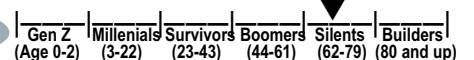
D3 FASTEST RACIAL/ETHNIC GROWTH

HISPANICS/LATINOS



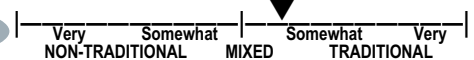
D4 GENERATION

SILENTS



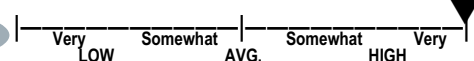
D5 FAMILY STRUCTURE

SOMEWHAT TRADITIONAL



D6 EDUCATION

EXTREMELY HIGH



Community Issues

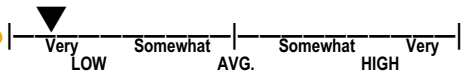
C1 PRIMARY CONCERNS

HOPES & DREAMS



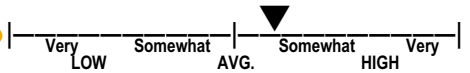
C2 RISC LEVEL (Stress Conditions)

VERY LOW



C3 POTENTIAL RESISTANCE TO CHANGE

SOMEWHAT HIGH



Faith Preferences

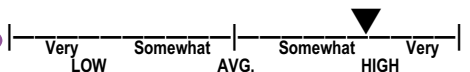
F1 FAITH RECEPTIVITY

SOMEWHAT HIGH



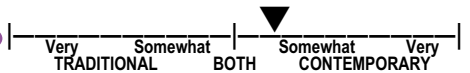
F2 FINANCIAL SUPPORT POTENTIAL

VERY HIGH



F3 CHURCH STYLE

SOMEWHAT CONTEMPORARY



F4 CHURCH PROGRAM PREFERENCE

RECREATION



F5 HAVE A RELIGIOUS PREFERENCE

SOMEWHAT HIGH





People and Place Detail

P1: How many people live in the defined study area?

Currently, there are 37,559 persons residing in the defined study area. The population has changed little if at all since 1990. During the same period of time, the U.S. as a whole grew by 16.9%. (see MAP page 4)

| Population History & Projection | 1990 Census | 2000 Census | 2004 Update | 2009 Projection |
|---------------------------------|-------------|-------------|-------------|-----------------|
| Study Area | 37,493 | 37,644 | 37,559 | 37,397 |

P2: Is the population in this area projected to grow?

No, between 2004 and 2009, the population is projected to remain stable. During the same period, the U.S. population is projected to grow by 5.3%. (see MAP page 4)

| Population Change | Actual Change From 1990 to 2000 | Actual Change From 2000 to 2004 | PROJECTED Change From 2004 to 2009 |
|-------------------|---------------------------------|---------------------------------|------------------------------------|
| Study Area | < 1% | -0% | -0% |
| U.S. AVERAGE | 13% | 3% | 5% |

P3: How spread out is the population in the study area?

In the study area, the top three quarters of the population resides in approximately 100% of the geographical area. In the U.S. as a whole and in the average community, the top 75% of the population resides in just 25% of the populated geographical area. In comparison, the study area population is *highly dispersed* within the overall area.

P4: What is the overall level of diversity in the area?

Based upon the number of different lifestyle and racial/ethnic groups in the area, the overall diversity in the study area can be described as *somewhat high*. See D1 and D2 below.

P5: How dynamic is the study area?

As the population density and overall diversity in an area increase, the environment becomes more complex and challenging. Given these factors, the study area dynamic level can be described as *very high*.

Faces of Diversity Detail

D1: How much lifestyle diversity is represented?

The lifestyle diversity in the area is *somewhat high* with 18 of the 50 U.S. Lifestyles segments represented. Of the six major segment groupings, the largest is referred to as *Young and Coming* which accounts for 55.9% of the households in the area. The top individual segment is *Reliable Young Starters* representing 24.8% of all households. (see MAP pages 13 and 14)

| Households By U.S. Lifestyles Group | Affluent Families | Middle American Families | Young and Coming | Rural Families | Senior Life | Ethnic & Urban Diversity |
|-------------------------------------|-------------------|--------------------------|------------------|----------------|-------------|--------------------------|
| Study Area | 7% | 27% | 56% | < 1% | 10% | < 1% |
| U.S. AVERAGE | 15% | 31% | 15% | 13% | 7% | 18% |

D2 & D3: How do racial or ethnic groups contribute to diversity in this area?

Based upon the total number of different groups present, the racial/ethnic diversity in the area is *somewhat high*. Among individual groups, *Anglos* represent 87.6% of the population and all other racial/ethnic groups make up just 12.4% which is well below the national average of 32%. The largest of these groups, *Asians*, accounts for 5.5% of the total population. *Hispanics/Latinos* are projected to be the fastest growing group increasing by 13.2% between 2004 and 2009. (see MAP pages 4 and 7)

| Population By Race/Ethnicity | Anglo | African-American | Hispanic | Asian | Native Am. and Other |
|------------------------------|-------|------------------|----------|-------|----------------------|
| Study Area | 88% | 3% | 2% | 5% | 2% |
| U.S. AVERAGE | 68% | 12% | 13% | 4% | 3% |

D4: What are the major generational groups represented?

The most significant group in terms of numbers and comparison to national averages is *Silents* (age 62 to 79) who make up 16.5% of the total population in the area compared to 12.0% of the U.S. population as a whole. (see MAP page 4)

| Population By Generation | Gen Z 0 to 2 | Millenials 3 to 22 | Survivors 23 to 43 | Boomers 44 to 61 | Silents 62 to 79 | Builders 80 & up |
|--------------------------|--------------|--------------------|--------------------|------------------|------------------|------------------|
| Study Area | 2% | 23% | 28% | 23% | 16% | 7% |
| U.S. AVERAGE | 3% | 29% | 30% | 22% | 12% | 4% |

Faces of Diversity Detail (cont.)

D5: Overall, how traditional are the family structures?

The area can be described as *somewhat traditional* due to the above average presence of married persons and two-parent families. (see MAP page 6)

| Population By Marital Status (15 and older) | Single (never married) | Divorced or Widowed | Married |
|---|------------------------|---------------------|---------|
| Study Area | 29% | 16% | 55% |
| U.S. AVERAGE | 27% | 16% | 57% |

D6: How educated are the adults?

Based upon the number of years completed and college enrollment, the overall education level in the area is *extremely high*. While 91.9% of the population aged 25 and over have graduated from high school as compared to the national average of 80.4%, college graduates account for 44.0% of those over 25 in the area versus 24.4% in the U.S. (see MAP page 8)

| Households with Children by Marital Status | Single Mothers | Single Fathers | Married Couples |
|--|----------------|----------------|-----------------|
| Study Area | 17% | 5% | 77% |
| U.S. AVERAGE | 23% | 7% | 69% |

| Adult Population By Education Completed | Less than High School | High School | Some College | College Graduate | Post Graduate |
|---|-----------------------|-------------|--------------|------------------|---------------|
| Study Area | 8% | 21% | 27% | 27% | 17% |
| U.S. AVERAGE | 20% | 29% | 27% | 16% | 9% |

Community Issues Detail

C1: Which household concerns are unusually high in the area?

Concerns which are likely to exceed the national average include: *Satisfying Job/Career, Retirement Opportunities, Time for Recreation/Leisure, Divorce, Social Injustice and Finding Companionship*. As an overall category, concerns related to *Hopes & Dreams* are the most significant based upon the total number of households and comparison to national averages. (see MAP page 16)

| Households By Primary Concerns Group | The Basics | Family Problems | Community Problems | Hopes and Dreams | Spiritual/Personal |
|--------------------------------------|------------|-----------------|--------------------|------------------|--------------------|
| Study Area | 23% | 11% | 15% | 34% | 14% |
| U.S. AVERAGE | 24% | 11% | 16% | 30% | 15% |

C2: What is the overall community stress level in the area?

Conditions which can contribute to placing an area at risk (particularly, the children) are at an overall *very low* level. This is evidenced by noting that on the whole the area is significantly below average in the characteristics known to contribute to community problems such as households below poverty line, adults without a high school diploma, households with a single mother and unusually high concern about issues such as community problems, family problems, and/or basic necessities such as food, housing and jobs. (see MAP pages 5, 6, 8, 9 and 16)

| Regionally Indexed Stress Conditions (RISC) | Households Below Poverty (\$15,000) | Households with Children: Single Mothers | Adult Pop.: High School Dropouts | Primary Concerns: The Basics | Primary Concerns: Family Problems | Primary Concerns: Community Problems |
|---|-------------------------------------|--|----------------------------------|------------------------------|-----------------------------------|--------------------------------------|
| Study Area | 7% | 17% | 8% | 23% | 11% | 15% |
| U.S. AVERAGE | 14% | 23% | 20% | 24% | 11% | 16% |

C3: How much overall resistance to change is likely in the area?

Based upon the assumption that as a group of people become older and more diverse the potential for resistance to change becomes more significant, the area's potential resistance is likely to be *somewhat high*. (see MAP pages 4-5, 13-14)

| Population By Age and Diversity | Average Age | Overall Lifestyle and Racial/Ethnic Diversity |
|---------------------------------|-------------|---|
| Study Area | 42.2 | 6 |
| U.S. AVERAGE | 37.0 | 5 |



Faith Preferences Detail

F1: What is the likely faith receptivity?

Overall, the likely faith involvement level and preference for historic Christian religious affiliations is *somewhat high* when compared to national averages. (see MAP page 15)

| Households By Faith Involvement Level | Not Involved | Somewhat Involved | Strongly Involved |
|---------------------------------------|--------------|-------------------|-------------------|
| Study Area | 33% | 32% | 33% |
| U.S. AVERAGE | 35% | 30% | 35% |

F2: What is the likely giving potential in the area?

Based upon the average household income of \$72,091 per year and the likely contribution behavior in the area, the overall religious giving potential can be described as *very high*. (see MAP page 4 and 17)

| Households By Religious Giving Potential | Average Annual Household Income | Households Contributing More Than \$500 per Year to Churches |
|--|---------------------------------|--|
| Study Area | \$72,091 | 32% |
| U.S. AVERAGE | \$63,207 | 31% |

F3: Do households prefer an overall church style which is more traditional or contemporary?

Based upon likely worship, music and architectural style preferences in the area, the overall church style preference can be described as *somewhat contemporary*. (see COMPASS pages 3 and 4)

| Households By Church Styles Preferences | Worship: Traditional | Music: Traditional | Architecture: Traditional | Worship: Contemporary | Music: Contemporary | Architecture: Contemporary |
|---|----------------------|--------------------|---------------------------|-----------------------|---------------------|----------------------------|
| Study Area | 22% | 25% | 27% | 27% | 23% | 19% |
| U.S. AVERAGE | 20% | 24% | 27% | 26% | 20% | 16% |

F4: Which general church programs or services are most likely to be preferred in the area?

Church program preferences which are likely to exceed the national average include: *Sports and/or Camping Programs, Cultural Programs (Music, Art, etc.), Active Retirement Programs and Marriage Enrichment Opportunities*. As an overall category, programs related to *Recreation* are the most significant based upon total number of households and comparison to national averages. (see COMPASS page 2)

| Households By Church Program Preference Category | Spiritual Development | Personal Development | Community/Social Services | Recreation |
|--|-----------------------|----------------------|---------------------------|------------|
| Study Area | 23% | 10% | 19% | 41% |
| U.S. AVERAGE | 25% | 10% | 20% | 38% |

F5: How likely are people to have some religious preference?

In the study area, 86.6% of the households are likely to express a preference for some particular religious tradition or affiliation, somewhat above the national average of 85.1%. (see MAP page 15)

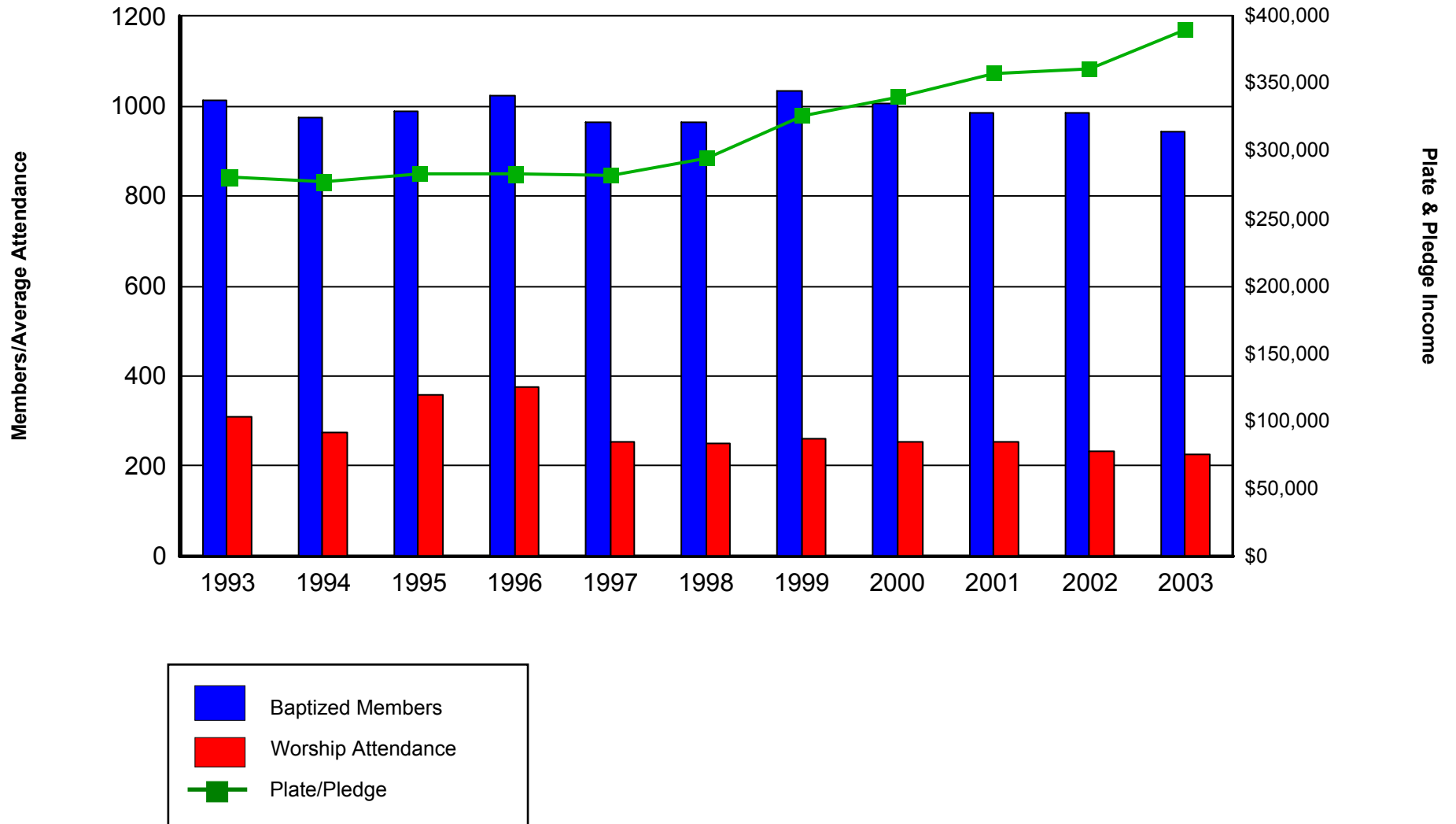
| Households By Religious Preference | No Preference | Non-"Historic Christian" Groups | "Historic Christian" Groups |
|------------------------------------|---------------|---------------------------------|-----------------------------|
| Study Area | 13% | 5% | 82% |
| U.S. AVERAGE | 15% | 8% | 77% |

APPENDIX G

SAMPLE COPY OF NATIONAL CHURCH PARTICIPATION
AND GIVING CHART

Participation & Giving Trends

St Christophers Episcopal Church, Roseville, MN (4386-5864)



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