

St. Anne's Episcopal Church

Congregation Assessment Tool (CAT)

Executive Summary

Spring 2023

Overview

We had excellent participation (157) representing 135% of our most recent average Sunday attendance; 96% of our pre-COVID average Sunday attendance. Thank you. This level of participation enables us to hear from and respond to a broad base of our congregation. We were seeking to meet the threshold of 33% participation that provides us with valid, reliable and representative data. We met this threshold and are confident that the results reflect our entire congregation.

In this assessment, we also have conversation partners. Our responses are compared to the responses of the last 2500 congregations (nationally) that have participated in the CAT over the last 24-36 months. Although every congregation is unique because of history, geography, size and denomination, congregations do hold much in common. This information provides a benchmark for comparative purposes.

The CAT is designed to measure the experiences, perceptions and aspirations of our congregation through the measures of congregational climate, culture and performance milestones.

Congregational Climate

Research tells us that two characteristics are necessary to create a vital congregation – high levels of member satisfaction and energy. Satisfaction is the sense of peaceful contentment, joy and lack of discord in the congregation. Energy is force of engagement, the spirit of the congregation that makes people want to be involved in its mission and ministries. For us, approximately 77% of responders are clearly satisfied with how things are here. Approximately 65% feel that there is a compelling sense of purpose or energy and members are not just going through the motions in their ministry/activity. Notably, in the measures of satisfaction and energy only one-quarter of responders are 'on the fence.' During a clergy transition, this percentage is usually higher. Therefore, this indicates that we may be managing this transition time very well. Compared to other congregations nationally, our member satisfaction is very high and our energy is high.

Overall, these measures indicate that we experience what is called a *Transformational Climate*. Fully transformational climates have discovered ways to be vibrant and healthy in spite of national or local trends. The more tangible expressions include an external focus, a distinctive mission, and an influx of new people; more intangible

expressions describe a corporate spiritual zest, inspired worship, healthy relationships, purposeful activity in the world and an atmosphere of well-being. This is an extremely positive indicator of congregational well-being. Yet this is a good news/bad news circumstance. The good news is that we are transformational; the bad news is that we are transformational. This means that we have worked well and effectively to create vibrant ministries, and it means that we need to continue this determined work. There is no resting on our laurels.

Areas of Focus (Drivers)

To determine how satisfied people are here, we focus on different areas or drivers. If people perceive we are performing well in these areas then the data suggests that their perception of their satisfaction or energy will go up. Likewise, if people perceive that these areas are not performing well, then their satisfaction or energy levels will go down.

Our drivers of satisfaction are:

1. Our church provides high quality education that is appropriate to every age and stage of life (Education)
2. Persons who serve as leaders in our church are representative of the membership (Governance)
3. Our church does a good job supporting persons in ministry by reminding them that they are making a difference (Ministry)
4. Being part of this church community has given new meaning to my life (Hospitality)
5. Our church does a good job helping each member understand that he or she is called to ministry (Ministry)

Our drivers of energy are:

1. There is not a disturbing amount of conflict in our congregation (Conflict Management)

In examining the pattern of our drivers, we learn another characteristic of our congregation. We are a ministry-focused congregation where responsibility for the life of the congregation is mutually shared with clergy and lay persons. This is in contrast with clergy-centric congregations who place responsibility for the congregation squarely on the shoulders of the Rector or authority-focused congregations where the focus of the work of the congregation is placed on the shoulders of those in governing leadership; those in authority are to make things happen. There is no one correct characteristic; this simply tells us about our expectations of one another and of leadership.

Future Priorities/Aspirations

As our members look to our future, a number of major priorities emerged. These priorities indicate where additional energy should be placed to achieve our future vision for the congregation. The top five are listed below.

1. Develop ministries that work toward healing those broken by life circumstances.
2. Create more opportunities for people to form meaningful relationships.
3. Develop and implement a comprehensive strategy to reach new people and incorporate them into the life of the church.
4. Strengthen the process by which members are called and equipped for ministry and leadership.
5. Expand outreach ministries that provide direct service to those living on the margins of society.

The nature of these priorities has a balance of internal and external focused. Though a characteristic of a vital and transformational congregation is its external focus, our priorities demonstrate a need to address a few internal concerns. By age group, all ages of our congregation are in agreement to pursue priorities #1, 2 and 5. Between age groups there are unique differences as well and will be important for future conversation.

Performance Areas

Our strengths and challenges are revealed and explained through the Performance Dashboard and Performance Indices. You assessed our congregation in the following eight areas:

- **Hospitality**
- **Morale**
- **Conflict Management**
- **Governance**
- **Spiritual Vitality**
- **Readiness for Ministry**
- **Engagement in Education**
- **Worship and Music**

According to our responses to questions around these eight indices, all eight score higher than most congregations nationally.

Hospitality measures the degree to which members perceive that the congregation is engaged in offering themselves and their resources to folks who are new, different or in need. We believe that we have a friendly atmosphere of genuine care and concern

and that we are prepared to welcome persons from many difference walks of life into our congregation. An important strength for us as we seek growth.

Morale expresses our strong engagement in our communal life and our clear sense of purpose and mission as a congregation. This measure is strong in spite of the challenging experiences of COVID and our transition time. This area demonstrates one of the strongest attributes.

Conflict management measures the degree to which members believe that conflict is managed and, where possible, resolved. Again, a critical strength for us knowing that if conflict is not dealt with appropriately, this is the one factor that could impact all aspects of the life of our congregation.

Governance measures the degree to which members believe that the decision-making structures and processes of the church are open to their concerns and input. Our rating indicates that the congregation positively perceives Vestry leadership. This allows us to exercise our leadership in ways that can move the congregation strategically forward, creatively re-thinking how we engage the needs of members as well as the needs of those we are trying to reach in our community. This area is of high importance since it is a driver of satisfaction.

Spiritual Vitality measures the degree to which members believe that their faith is central to their lives. This aspect of our congregation is fairly strong. Unique to this index is its direct correlation to financial giving to the church. Research shows that the closer people feel to God, the more they contribute to their churches. The percent of annual household income given to our church is 2.7%, slightly above the national average for the Episcopal church (2.3%). The good news is related to our household incomes and the capacity for giving to the church.

Readiness for Ministry registers our understanding of our baptismal call to serve. This area is an important priority in terms of giving more attention to equipping members for ministry and leadership.

Engagement in Education: We are motivated toward life-long learning/formation, and our scores indicate that we value the high quality of our programming and our flexibility in providing this programming to meet the busy schedules of our members. Another key strength.

Worship/Music is a primary indicator of congregation vitality, and essential for growth. This area is our greatest strength; essential for our own spiritual development, and important to our overall vibrancy as a congregation as well as a critical factor for growth.

What else did we learn?

Our congregation's culture:

- We lean theologically progressive, yet 44% of us are more theologically conservative. We have a high theological diversity. Our ability to hold this diversity respectfully is an important strength that may be welcoming to those looking for a new parish home.
- Our flexibility style registers the degree to which, as a congregation, we are willing to make adjustments or experiment with the ways we go about our ministry to connect with our local context. Our overall survey results suggest that we seek renewal, change and growth, yet our culture is not totally comfortable with those goals. There demonstrates some strategic dissonance in our culture: we want our church to grow, to be vital and transformative, but with some discomfort with innovation/change. Discussion and discernment on this characteristic in an important topic of ongoing congregational conversation: How might we continue to go about continued growth as a “somewhat flexible” congregation? In incremental ways? How might we experiment with new ways in aspects of our congregational life and learn from those experiments? Research indicates that adaptability to our context, like any organization, is essential in our ability to grow and thrive as a congregation.
- In correlating Theological perspective and Flexibility, we have learned that we are both a “Paraclete” culture and a “Magi” culture. Aspects of both of these cultures includes:
 - Paraclete cultures are intellectually open and reflective, in particular paying attention to structure and ritual. At their best, they embrace those with different theological and spiritual perspectives. A warm and hospitable Paraclete community can make the church a potential haven for those in need of healing. Yet if Paraclete churches lose their mission focus, they often retreat into cycles of well-intentioned, but unfruitful activity; they try working harder at the same things and become frustrated by the lack of results.
 - Magi cultures are analytic, valuing deep knowledge, open discourse and intellectual curiosity. The analytic nature of Magi cultures makes them a powerful ally for those in need of advocacy. Yet, if they lose their missional focus, their strong intellectual focus may leave them open to retreating into esoteric debates causing them to be defined more by what they think than by what they do; members can become frustrated that decisions do not bring about change.

In undertaking the CAT at this time of transition, we commit to what is necessary to maintain/grow our vitality as a congregation. In particular, that we better align our culture (flexibility/innovation) with our aspirations for the future. There is much to celebrate, and of course, more work to do together.

How this affects our search for a Rector:

Based on the excellent participation and input of the congregation and the detailed interpretation, the search committee will be looking for a Rector with the following qualities:

- Strong in preaching and the environment of worship
- Comfortable with theological diversity and welcoming it
- Innovative but patience in making changes
- Skillful in energizing people- especially in leadership and ministry roles
- Energized being out in the community
- A tract record of growth

Thank you for your participation in this important exercise of self-study and planning for our future. We do look forward to the on-going conversations and the work that the CAT results are calling us to.