Congregational Consulting Process

Prepared by David Brubaker

1. **Initial Contact**

   The consultant is normally contacted initially by a judicatory official (conference minister), pastor or priest, or chairperson of the board (Council/Vestry/Session). During this initial contact, the consultant begins to assess the scope of the intervention request and whether s/he would be an appropriate person to work with the congregation.

2. **Contracting Meeting**

   After the initial contact, the consultant may then ask to meet with the governing board of the congregation. The primary purpose of this meeting is to discern if the board members desire to proceed with a consulting process, and to estimate time and cost parameters. A "Memorandum of Understanding" may be produced after this meeting, and a Reference Team (task force) may also be established to work with the consultant.

3. **Information-Gathering**

   The initial months of the process will focus on information-gathering. Methods used may include individual interviews, focus groups, and/or written surveys. The primary purpose of this stage is for the consultant to learn as much as possible about the congregation, including its history and current structure and processes. In addition, congregational members often appreciate the opportunity to share about their own history and experiences with the congregation.

4. **Assessment**

   Based on the information that was assembled during the previous stage, the consultant (with the Reference Team, if appointed) will then make an assessment and develop recommendations to address the issues identified. A thorough assessment normally includes attention to the strengths of the congregation, as well as any current challenges that need to be addressed.

5. **Recommendations**

   Connected with the assessment, the consultant (and Reference Team, if appointed) will also develop recommendations for consideration by the governing board.

Recommendations are typically connected to specific issues that were framed during the assessment process, and may address personal, interpersonal, group, and systemic issues.

6. **Implementation**

   Once the governing board has reviewed, revised, and adopted the recommendations, the consultant (with the Reference Team, if appropriate) may accompany the implementation stage as well. This stage may vary in length from several months to several years.

7. **Evaluation**

   The consultant will normally distribute evaluation forms to individuals closely involved in the process, once the implementation stage is well underway.

Forming a Reference Team in Congregational Consulting Processes
By David Brubaker

Purposes:
- To accompany the consultant(s) in the process of designing and implementing a systemic intervention.
- To assist in the data gathering and assessment stages of the intervention process, and work with the consultant(s) to analyze data and develop appropriate recommendations.
- To advocate for implementation of the recommendations with leaders of the congregation, and to assist the consultant(s) in evaluating their impact.

Composition:
- Reference Teams are generally composed of five to seven members chosen to represent the diversity of the congregation.
- In nominating members, attention should be paid to gender, age, and ethnic diversity, as well as to diverse (but not extreme) perspectives on the relevant issue(s).
- Reference Teams are generally appointed by the governing body of the congregation—and may be called an ad hoc committee, team, or task force.

Training:
- Team members require training to understand that their essential job is to advocate for a fair process, not a particular outcome.
- The consultant(s) also need to work with Team members at an initial meeting to establish “ground rules” (or “guidelines for dialogue”) for the group’s process.
- Since the quality of the Team’s process will have a “ripple effect” on the entire congregation, the consultant(s) may also need to monitor ongoing group dialogue and address inappropriate behavior as needed.

When <u>Not</u> to Appoint:

- A Team need not be appointed when the issues are not system-wide, or when the existing leadership group is broad enough and available enough to manage the change process.
- The consultant(s) need to conduct an initial assessment of the intensity and breadth of the issues affecting the congregation, prior to recommending the formation of the Team.

Benefits and Dangers:

- The intervention process and the resulting recommendations tend to be "owned" by a diverse group of congregational members.
- Team members may pay a personal price due to the amount of time involved and the inevitable resistance to change that occurs.