



VISIONS + DECISIONS

DecisionsPoll

A guide to your congregational survey

Introduction to the guide

Simply by looking around you during worship, you could survey your congregation. You might notice that members are young and have lots of children, or that they are older and few have children with them. Through long association, you may also remember something about each of them: Where they work, what they believe, how they feel about the church.

But there are times when a church needs to learn much, much more about itself. For example, that may be when a church is engaged in planning for the future. Or it may be when the congregation finds itself in crisis. In the first instance, the church is redefining itself; in the second instance, it is rebuilding itself.

In both instances, a good congregational survey may be part of the process:

- **Redefine.** All is going reasonably well, but you need to take the measure of the congregation. Trying to envision where the church should be in the future, you've turned to a congregational survey as a tool in a process to understand where your congregation is now, and how you may need to redefine yourself as you move through this new century.

- **Rebuild.** Your congregation is at a critical juncture. Because of radical transitions around your church, conflict that lingers on, struggles over leadership, or a loss of organizational vigor, your church is now on shaky ground. To rebuild, you've turned to a congregational survey as a way to learn impartially about members and what they're thinking.

Doing a survey is an excellent way to improve the ministry of your church. But you need to be forewarned that for a survey to be reliable and useful, it involves careful planning and some hard work. This guide will help you conduct the DecisionsPoll, to understand its results, and to plan the next steps based on its results.

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Surveys are valuable

A congregational survey is an important tool. It collects information about members, and assesses church programs and ministry. The information is reliable, and unbiased by our personal consideration.

As a tool, it has four valuable facets:

- **First,** the congregational survey is comprehensive. It is wide-ranging. You may know generally who belongs to your church, what they're like and how they think. But like everyone, your knowledge is limited by your awareness. You simply don't know everyone or everything well enough.

- **Second,** the results of the survey are "qualitative." They're actual numbers, not our general sense of how things stack up. The survey reveals exactly how many people live near the church, exactly how many like traditional choral music, and exactly how often people come to worship.

- **Third,** the survey is confidential. People can put down what they believe without fear of being judged. They are not silenced by the forceful opinions of others.

- **Fourth,** the survey is impartial. What you think you know about your church, its programs, and people is at least subtly affected by your feelings. It's your church, after all, and it's hard to be objective.

Survey results are unswayed by personal convictions.

Much useful information

Being comprehensive but compact, the survey collects a wide range of useful information about your congregation. To elicit that information, the survey uses tried-and-true questions from professional and academic survey work. In all, it has 30 questions. Those questions take about 30 minutes to fill out. Though compact, the survey may still require gentle persuasion on your part in order to get enough people to fill it out. That's part of the hard work to come.

The good news is that the survey yields a good amount of quality information. Since it uses tried-and-true questions, the responses can be interpreted in known ways. This information derived from the responses will be helpful to the church in many different ways and for many years to come. Whether you are at a critical time in your life as a church, or trying to get a solid feel for which to go in the future, this survey should provide most of what you need to know.

Questions in the survey gather information on:

- Demographics. For example, how old are your members?
- Participation. What programs do people take part in?
- Belonging. How tied are people to the congregation?
- Practice. Do people pray and read the Bible regularly?
- Beliefs. What makes a good Christian?
- Preferences. Are contemplative chants favored over praise choruses?
- Expectations. Should the pastor help people grow, or should the pastor lead social ministries?
- Satisfaction. Does this congregation do good work with youth?

Plan of the guide

The first section of this guide takes you through the process of getting the survey forms out to people and taking them back in. Doing this properly is critical to the success of your survey. If done poorly, you'll get poor results. They may even steer the church the wrong way. Read this section carefully, and plan accordingly. The section also tells how to package the completed forms and return them to Visions-Decisions.

The second section deals with understanding the results, and then getting the information to the congregation in a constructive fashion. Fleshing out the results with member interaction is the next stage.

In the back of the guide is a copy of the survey form. You may freely copy it for distribution in your congregation as part of the survey, but you may not share it with other congregations. We also ask that you not alter the survey form.

Having solid, dependable information on your congregation is well worth the effort. A survey is hard work. But it is also exciting. Your congregation is about to embark on a new course, whether it is about to rebuild or looking to redefine. You may find that -- regardless of the actual answers -- the process itself will be a key energizing event in the life of your congregation.

Conducting the survey

This section tells how to conduct the survey, outlining the best methods of distributing the survey to your congregation and getting wide participation, which is important if the survey is to be dependable. It also discusses ways to follow up on the survey, and how to prepare and package the survey forms for tabulation.

Who should answer the survey?

All persons (or at least a "random sample" of all who have a stake in the congregation) should answer the questionnaire. In each congregation, the answer to the question "Who should answer the questionnaire?" depends upon three factors:

- The size of the congregation,
- How membership or participation is defined, and
- The method by which the questionnaire is distributed and returned.

For congregations up to 200 members/participants who live fairly close by, all should be included. No distinction should be made by age, levels of participation, contributions, or degrees of satisfaction with the congregation. These variations will become clear in the analysis of the DecisionsPoll responses and will be important in getting a complete picture of the congregation.

Ways to administer the survey

Successful surveys begin with convincing the respondents of the importance of the survey and how the congregation will benefit from having the information. Communication that states the goal and the process of this information gathering will make the respondents more receptive to the questionnaire and increase the rate of returns.

Some of the factors that influence the method of administering the survey are the size of the congregation, the availability of names and addresses of all participants, and what steps are likely to produce a high rate of returns.

Choice 1: The whole congregation

Small and mid-sized congregations will need to get the questionnaire to all participants. Some larger congregations may want to include all participants so that no one will feel that his or her experience and opinion is being left out. If the congregation can put together an up-to-date mailing list of all participants, the preferred way of distribution would be to send each person a first-class mailing. Alternatively, the congregation can distribute the survey as a packet at worship services, classes and church events, and ask people to return them by mail or in person at the next worship service. A third way is to distribute the survey during worship services or class times, ask people to fill out the survey at that time, and then take up the survey.

How to do a mailing

The mailing should include a questionnaire with a cover letter (see sample) which explains the

need for each person's responses and a self-addressed stamped envelope for the return of the questionnaire. The cover letter should request that the questionnaire be returned no later than 10 days from the time that the questionnaire reaches the respondent. Respondents need enough time to fill out the

Supplies needed for the survey

1. Master list of church members and attenders, minus non-resident members.
2. Large mailing envelopes (9" by 12"), one for each survey to be sent.*
3. Regular envelope, self-addressed to church and stamped, one for each survey.*
4. Postcards, to be printed with message, self-addressed and stamped.*
5. Appropriate postage for large and regular envelopes and postcards.
6. Mailing labels, one for each survey, for large envelopes.
7. Letter from church to be enclosed with survey (see sample).
8. Locked file to store surveys as they are returned.
9. Large box to ship survey forms for tabulation.

* More of these items may be required if second or third mailing is needed.

DecisionsPoll because of their busy schedules. However, giving respondents too much time will allow some respondents to put it off and not respond at all.

Response rates to a single mailing of a questionnaire for a congregational survey probably will be less than 40%, and may be as low as 25%. A rate of 75% or above is preferred to insure a more reliable picture of the congregation. Some researchers feel that a return rate of less than 60% may provide a misleading picture and one that may be dangerous for planning.

Getting the fringes

Since a lower than desired return rate may be expected from a single mailing of the questionnaire, other steps need to be taken to increase the response rate.

These steps might include a second (and third) mailing, a telephone call to those that have not responded,

and volunteers to help those who have difficulty with the questionnaire. The participants who are more likely to respond to the first mailing are those who are more active and those who are more satisfied with the congregation. The less involved and the less satisfied will probably be under represented in the first round response. But those voices are important in this survey and an extra effort must be made to insure their representation. Steps to accomplish this will be discussed below.

Choice 2: Sample survey

Large congregations may decide to do a random survey instead of asking everyone to fill out a questionnaire. The statistical rules that are used to select sample sizes for any random survey are complicated and depend on the "population size" of the group surveyed and the degree of precision desired.

For a congregation of 250 members/participants, 203 responses to a random survey would produce a sample error of +/- 3%, at a 95% confidence level. Without a lengthy discussion of confidence levels and sample errors, the following numbers of returns for larger congregations are recommended and would have a +/- 3% sample error:

Congregation size	Questionnaires returned
250	203
400	328
500	341
1,000	516
2,500	748
5,000	880

How to randomize

The process of random selection of those to be sampled begins with a good list of the names and addresses of congregation members/participants who live close enough to be regular in attendance. Lists that include those who have moved away and may only return once a year need to be removed. Also, "friends" of the congregation, who may be on the list to receive mailings, but have little or no participation should be removed from the list before random selection begins. Those who are infirm should be left on the list, unless the infirmity makes it impossible for him or her to answer the questions.

Once the list is ready, the random selection can begin. The size of the list determines the number to be selected. If the list has 500 names, 341 (or slightly more) should be selected at random. This means that selection is dependent upon where a person is on the list, and not upon who that person is. An acceptable method of random selection is devised when every person on the list has an equal chance of being on the sample list. In the congregation list of 500 members, selecting every other person on the list would produce 250 respondents. In order to continue the idea of random chance, the numbers one and two could be placed in a hat and drawn to determine if the first person or the second person on the list is the starting place for selection. The remaining list of those not selected would contain 250 names and if every third name remaining were selected, another 83 persons would be added to the sample list. Again, a chance determination of the starting selection should be made. Of the remaining list of 167 persons, selecting every tenth name would supply 16 more for the sample list. Thus, a sample list of 349 persons is generated. The point of random selection is that no one is selected because of who he or she is, but only by the place they are on an ordered list.

Best ways to distribute

Those on the random sample list should receive the questionnaire by first class mail, with the cover letter addressed to them personally. If two persons living at the same address are on the sample list, they should each receive a personal letter. Each person should also receive in the mailing an addressed and stamped envelope to return the questionnaire and a post card (addressed and stamped) to be signed and returned separately when he or she has returned the questionnaire. The reason for the card is to protect anonymity, which will be discussed later. Another reason for the return card is to modify the sample list for the second mailing. See the sample on this page.

Follow up is essential

After the first mailing is posted, it is important to use the congregation's usual means of communication and persuasion to remind persons of the need to fill out and return the questionnaire. The survey should be mentioned at worship services, during classes and before all church activities, and people should be urged to return the finished survey as soon as possible. Notices should be put in church bulletins, newsletters and on bulletin boards. Good communication may increase the return rate by 5% to

Sample letter with survey

Dear congregational member or friend,

Thank you for your time and thoughtfulness in answering this questionnaire.

You are being asked to indicate what you appreciate about this congregation, what your involvement is, and what your opinions are about practices and beliefs. Your answers are your own and will remain confidential.

Your answers to these questions will help the congregation gain understanding about what participants value in the life of the congregation, and what might be considered in planning for the future. Again, your responses will be held in confidence by the person who will be entering your answers into a computer program for analysis.

To answer the questions, please place an X or a check mark in the boxes that best represent your views. Please try to answer each question, even if an option you would prefer is missing from the questionnaire.

If you have questions about this survey, please direct them to the people designated by your congregations to lead and process this survey effort.

Return to the survey as directed with this cover sheet still attached. The survey has three pages. Be sure each page has been answered before turning the survey in.

Please also return separately the attached stamped card.

Thank you again for your participation.

10%.

Another useful follow-up is the second mailing. This mailing should be within five to 10 days of the deadline set for the return of the questionnaire in the first mailing. This mailing should be sent to all who did not return the postcard from the first mailing. The second mailing should include a questionnaire, a cover letter, a return envelope, and a return post card. This cover letter should report the rate of return from the first mailing and a return rate goal to provide the most accurate picture of the congregation. The letter should give another deadline, no later than 10 days from the day that the new mailing should be delivered. The second mailing should increase the response rate by 10% to 15%. Though this may be expensive for some congregations, remember that the quality of the survey results depends on the quantity of surveys returned.

If, after the second deadline, the overall response rate is less than 60%, a third mailing should be done, as well as more appeals to members at church events and in other mailings and notices. The third cover letter should report the progress in the response rate and emphasize the need for

completion in order to honor the contributions of information that others have made. A return card could be left out of this mailing, because a fourth mailing is not likely. After this attempt, you must go with what you have.

Another follow-up would be to phone those who have not responded to ask for their participation.

An offer to supply a volunteer for those needing help may be useful. The volunteer would have to be acceptable to the respondent, and would need to honor anonymity and confidentiality.

Another distribution method

Particularly if a name and address list is not available, and cannot be created, a different method of distribution of the questionnaire must be devised. One method would be to distribute a packet to each attendee at three consecutive worship services of the congregation. The packet would contain the same items as the first mailing described above except that the cover letter would not be addressed to a particular person. Attendees could be asked to mail in the questionnaire, or to return it at the following worship service. The questionnaires and the cards could be collected as a part of the offering on that day. Announcements about the importance of returning the information and the progress of the data collection would increase the return rate. Attendees should be reminded that they should fill out only one questionnaire and when they have done that, not to take another packet.

Taking the survey during church

A third means of distributing the survey is simply handing out the survey during worship or in classes. People would take the survey at that time, and the completed surveys then taken up. While this may be the quickest, easiest and if not, cheapest way to do the survey, this method is not always the best way. First, the people who answer the survey will only be those people who are at worship or in class at that particular time. In some congregations, average attendance may be a third or less of actual membership. This means the survey would be biased toward the most regular attendees, and the opinions of less frequent attendees will be lost. Also, some congregations find that interrupting worship services to fill out a survey is not always thought to be proper by its attendees.

However, if you use this method, be certain that sharp pencils or working pens are also distributed at the same time, and that people have a surface on which to put the form in order to make easy marks on the paper. Also, don't hurry people to finish the survey. Remember that it takes at least 30 minutes to complete the survey. People should not feel they are under a time limit and end up answering the questions without thoughtful consideration.

Maintaining confidentiality

The purpose of using a questionnaire is to get honest opinions and accurate information from respondents. This best can be accomplished by insuring anonymity and confidentiality. Anonymity means that the respondent is not identified on the questionnaire by name or code. Confidentiality means that if someone knows a person's response, that information will not be made known to another. Anonymity and confidentiality should be maintained to insure accurate and honest information. They are also necessary to protect respondents from being attacked by others who differ with them. Questionnaires are not meant for public disclosure.

Anonymity and confidentiality need to be stressed and maintained throughout the survey process. The information about data gathering should emphasize this from the beginning. The questionnaire that each person receives should be the same as every other person receives, with no coded symbols, letters or numbers. Persons should be asked not to put their name on the questionnaire. They need to know that only the person entering the data will read each questionnaire and that information will be kept confidential.

The cover letter with the first mailing of the questionnaire, and with each subsequent mailing, should stress that the returns will be held in strict confidentiality. All notices and announcements should

also mention confidentiality. When the returns come into the church office, they should be placed in a locked file.

Finally, the report we provide of the findings is done in such a way that the opinions of an individual cannot be identified. To report an opinion of 40-year-old carpenters, who live in a certain zip code, when there is only one person in the congregation who fits that description is not protecting confidentiality.

Returning the questionnaires

The next step is returning the questionnaires to us for tabulation. Whatever method you utilize, you should set a time limit on how long you are willing to wait before returning the questionnaires for tabulation.

Sample return card

Thank you for completing the survey. This self-addressed, stamped card will help verify who has completed the survey. This card is to be returned to the church, but separately from the survey.

Please print your name below before returning the form:

Remember to return this card separately. ***Do not include it with your survey.***

Otherwise the process may drag out far too long, and some of the excitement generated in conducting the survey may be lost in waiting for the data. If, after you return the forms, a few more responses come in and you still need more responses in order to make sure the response rate is

adequate, go ahead and contact us and we will make certain those responses are included in the report.

Before packaging up the completed forms the survey forms for shipping, remove the cover sheets and any other material that you may have attached to the survey when distributing it. Also remove any additional sheets or other items that respondents may have attached to the form when they sent it in. Count the number of responses. It is not necessary for you to check the forms to see that they are properly filled out. We will review each of the forms before tabulation, and remove any form that has only a few questions answered or has been extensively marred by the respondent. Let us make those decisions, however.

Next, place the survey forms in a large envelope or box, all facing in the same direction, same side up. Identify on the box the name of your church, your address and the number of forms sent. You can ship the forms by any method, but a reliable carrier is important. If the forms are lost in shipping, the whole survey will have to be conducted again. Use a service with a tracking number, such as Fedex, UPS, DHL or Postal Express Mail. Make sure that the shipping package has a return address and includes phone numbers for both you and us. It may be too difficult to copy all the forms for the sake of security, but if you do copy them, dispose of those forms once we have the shipment. Once shipped, contact us by phone or by e-mail and tell us the package is on the way.

Our shipping address is: 1440 Dutch Valley Pl., Ste. 120, Atlanta, GA 30324.

Our phone number is: 404-685-1730.

Our e-mail is: info@visions-decisions.com

Telling about, acting on the report

This section explains what to do when you get the survey back. It explains how to set up a survey committee, what they should look for in the data, and what steps the committee should take in distributing the survey, getting feedback from the congregation, and creating proposals on which to act from the survey.

Working with the results

In about a month, the results of the survey will be sent to your church in the form of a 10-page report. But before you get the report, it is important that your congregation be ready to properly review, disseminate and take action on the survey report. The way that you approach the report does not have to follow a set procedure, but you should develop beforehand a means of understanding and acting on the report that best fits your congregation and the challenges it faces.

The three steps the congregation will need to undertake after receiving the report are:

- reviewing the data and getting a clear understanding of its implications,
- disseminating the data to members of the congregation in order to educate them on the report and to elicit their reactions and suggestions, and
- deciding what actions or changes may (or may not) be required by the report.

In conjunction with this process, you may also want to look at other material about your congregation and community. This information can include data derived from feedback sessions from the congregation, a careful analysis of the congregation's statistical trends over time, and an assessment of the conditions of your building(s). It can also include a thorough demographic report on the place you consider your community; information gathering sessions held with people in the community; and a review of other congregations in the community and the ministry they perform in that community.

Setting up for the report

The important first step is setting up the structure to deal with the report. This structure may simply consist, for example, of an informal ad hoc committee made up of different congregational leaders and laypersons, or it may be done within the existing organizational structure of the congregation. However, it is our recommendation that creating a special committee is the best way to go. It is also important that the committee have the means to do its job properly. The committee should be able to work directly with the congregation and be able to make recommendations directly to the appropriate congregational officers or bodies, or the congregation itself. In everything else, the extent of review and decision-making by the committee should be tailored to your particular circumstances and to the working structure of the congregation.

Reviewing the report

The second step is reviewing the report. Copies should be made for every person on the committee and the report should be sent to those persons several days before the committee first meets so that they have adequate time to review the information. Getting the report to everyone first makes sure that process remains collaborative and is not subject to the opinions of a few people who become the "experts" on the report.

The actual report consists of a preface talking about the shape of the survey, a single page highlighting 10 key points from the survey, and six sections showing particular data from the survey. The six sections focus on congregational ties; likes and dislikes; worship practices; congregational activity; religious faith; and congregational demography. Each section has tables showing the percent response to every answer, and graphics illustrating responses to the key questions. Some information about typical responses to each question is also given. However, it is important to remember that there is no such thing as a “typical” congregation. Survey responses across congregations are the average of many diverse bodies. The point of this survey is not to compare yourself with other congregations. The point is to get a useful working knowledge of who you are as a congregation and to identify what you believe are your strengths and weaknesses as that congregation. From that you can plan the actions and changes which you feel are appropriate, based on who you are religiously and organizationally, and not to simply shape yourself after other congregations.

As you review the results of the survey as a group, the key questions to be considered are:

- What are the surprises? What responses seem different than what you thought they might be?
- What are the perceived strengths of your congregation based on the responses and your ideas of what a good congregation should be?
- Conversely, what are the perceived weaknesses of your congregation, again based on the responses and what your ideas of what is a weak congregation?

The next step is to summarize the data from each section, and then summarize the data for all sections. Add in the perceived strengths and weaknesses, and any results that seem to be contrary to popular knowledge about the congregation. Then consider what are the implications of these strengths and weaknesses on the church, and what directions the church may consider taking in its ministry, mission and program as a result. This step should produce a carefully written brief paragraph that pictures the congregation as it is. If you are looking at other kinds of information about your congregation and community, you may also want to add that information to the paragraph or create additional, brief summary paragraphs.

The point of this survey is not to compare yourself with other congregations. The point is to get a useful working knowledge of who you are as a congregation and to identify what you believe are your strengths and weaknesses as that congregation.

Getting the results out

After writing the paragraph, it is time to get the information out to the congregation itself. After all, they are the ones who answered the survey. This step will also help the committee by creating more input and catching things that the committee might have missed in its own deliberations.

The best way to distribute the information is two-fold. The first is to prepare a one- to two-page summary of the survey results, highlighting what you consider to be key findings, the strengths and weaknesses of the church, and the implications of the latter. The summary should include the paragraph composed by the committee. This survey information should be made available to the congregation at its worship services and at church programs. Notices about the summary should be put in the worship bulletin and church newsletter. Alternatively, you may want to mail a copy of the summary to each person or family in the congregation, either as a separate mailing or inserted with the regular church newsletter.

In addition to distributing the summary, your congregation should also schedule a series of listening sessions about the survey. You will need to have several of these sessions, held at different times over a

period of a week or two so that they fit most schedules. People may attend any session, though attendance at the sessions should be stressed. At each session, attendance may range from a handful of people to several dozen. These sessions should begin with a talk by a committee member about the survey, explaining why the survey was done, and highlighting the key findings, the perceived strengths and weaknesses, and the implications on the congregation. Copies of the full report might also be made available to those who want to read it.

Following the talk, the session should turn to eliciting comment from attendees on the survey. This listening period, conducted by a committee member, should first solicit comments on the survey results and of people's interpretations of that data. Secondly, the session should turn to what people perceive to be the implications of that data, and their evaluation of what are held as the church's strengths and weaknesses. Finally, the session should focus on implications and draw out ideas on directions the congregation should take as a result of this survey data. Another committee should be present at each session to take notes on the session and people's comments. At the close of the session, attendees should be urged to share any additional comments on paper, or through e-mails.

Hearing and acting on the response

After the listening sessions are completed, the notes should be gathered up and summarized. The committee should reconvene to hear the reaction of the congregation and to share insights they may have gained as a result of attending the sessions. At this point, or at a later session, the committee should revisit its conclusions and modify them to reflect the input of the congregation. The paragraph should be rewritten to reflect those modifications.

Then, the committee should consider what actions the congregation may want to take as the result of the survey and from the input of the congregation. These actions should be concrete and practical, and include the full range of the church's activities, from worship to community ministries. The proposed actions should then be distributed to the responsible persons and/or committees within the church, and the basis for the actions explained by a committee member to each person or committee. The persons or committees should then decide what actions they need to take. This part of the process may be a lengthy one, and require several meetings or in some instances, even a committee or leadership retreat. It will be important for congregation leadership to hold the proposed before the committee and make certain that they receive proper consideration. The survey committee may want to reconvene after a period of time to hear what those persons or committees have decided and how the proposed actions are being implicated.

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A stronger congregation

The purpose of this process is not to impose perceived interpretations or solutions by the survey committee on the congregation, but to gain as much participation across the congregation in the survey and generate discussion that will help the congregation better understand who it is and where it should be going. Of course, the congregation will want to shape this process to fit within the culture of the congregation and its means of decision-making. Nevertheless, the result should be fresh insights that lead to a stronger congregation and greater involvement by congregants in the future direction of the church.