

JUDICATORY VITALITY ASSESSMENT

Complete Question Set

by The FaithX Project with the Episcopal Church Foundation

SECTION 1: VITALITY		(the capacity to thrive)			
I. VISION, MISSION, AND DISCERNMENT					
1	The judicatory has a vision statement.	Disagree	Unsure	Agree	Strongly Agree
2	Our judicatory's vision describes our reason for existence (what we are here for/why we exist).	Disagree	Unsure	Agree	Strongly Agree
3	The judicatory works towards a vision that is more important than its continued existence.	Disagree	Unsure	Agree	Strongly Agree
4	Every member of the judicatory team understands and can clearly describe the judicatories vision in a few words.	Disagree	Unsure	Agree	Strongly Agree
5	The judicatory has a mission statement that describes how it achieves its vision.	Disagree	Unsure	Agree	Strongly Agree
6	The judicatory intentionally strives to live out its work and ministry according to a defined set of core values.	Disagree	Unsure	Agree	Strongly Agree
7	Every member of the judicatory team understands and can explain how the group they lead supports its mission and vision.	Disagree	Unsure	Agree	Strongly Agree
8	The judicatory vision and mission results from an annual judicatory-wide cycle of discernment (not imposed by leadership).	Disagree	Unsure	Agree	Strongly Agree
9	The judicatory vision and mission are supported by strategic goals, benchmarks, and next steps with timeframes.	Disagree	Unsure	Agree	Strongly Agree
10	The judicatory has procedures, tools, and metrics in place to regularly measure progress toward realization of its vision, mission, and goals.	Disagree	Unsure	Agree	Strongly Agree
II. CONGREGATIONAL ENGAGEMENT & EMPOWERMENT					
11	Lay and clergy congregational leaders are actively involved in key judicatory committees.	Disagree	Unsure	Agree	Strongly Agree
12	Judicatory leadership encourages congregational involvement in decision making on issues that affect them.	Disagree	Unsure	Agree	Strongly Agree
13	Judicatory leadership fosters mutual respect between the judicatory and its congregations.	Disagree	Unsure	Agree	Strongly Agree
14	The judicatory has mechanisms for mutual accountability at all levels of its internal organizational structure.	Disagree	Unsure	Agree	Strongly Agree
15	The judicatory has mechanisms for mutual accountability between the judicatory and its congregations.	Disagree	Unsure	Agree	Strongly Agree
III: CONTEXT AWARENESS AND INCLUSION					
16	Judicatory leadership actively studies the demographics, culture, strengths, and vulnerabilities of its member congregations.	Disagree	Unsure	Agree	Strongly Agree
17	Judicatory leadership regularly engages with member congregations and their communities on their own "turf."	Disagree	Unsure	Agree	Strongly Agree
18	Judicatory leadership intentionally works to ensure that the diversity of the judicatory team is representative of the diversity of the populations living within its bounds.	Disagree	Unsure	Agree	Strongly Agree
19	The judicatory team is intentional in its efforts to include, engage, and follow the personal and professional lives of existing and incoming congregational clergy and lay leaders.	Disagree	Unsure	Agree	Strongly Agree
20	The judicatory team intentionally works to build collaborative relationships among member congregations and their clergy and lay leaders.	Disagree	Unsure	Agree	Strongly Agree

IV: CHANGE READINESS					
21	The judicatory team demonstrates excitement and hope about the future of the judicatory and its member congregations.	Disagree	Unsure	Agree	Strongly Agree
22	The judicatory leadership demonstrate willingness to make decisions based on evaluation and strategy rather than tradition and nostalgia.	Disagree	Unsure	Agree	Strongly Agree
23	The judicatory team demonstrates willingness to experiment with strategies and technologies to achieve its vision and mission.	Disagree	Unsure	Agree	Strongly Agree
24	When necessary the judicatory team demonstrates willingness to tolerate discomfort to agilely achieve vision/mission-driven change.	Disagree	Unsure	Agree	Strongly Agree
25	The judicatory has a structured process for helping congregations develop readiness to engage vision/mission-driven change in an agile way when necessary.	Disagree	Unsure	Agree	Strongly Agree
V. DEALING WITH DIFFERENCES					
26	The judicatory team understands differences and even conflict as a natural, inevitable, and potentially positive part of being a community, and works to make space for safe expression of differences.	Disagree	Unsure	Agree	Strongly Agree
27	The judicatory team responds to conflict directly by engaging in dialogue.	Disagree	Unsure	Agree	Strongly Agree
28	The judicatory team does not deal with differences or conflict by ignoring it, dividing into factions, or engaging in passive-aggressive behavior.	Disagree	Unsure	Agree	Strongly Agree
29	The judicatory has a structured process for helping congregations learn to deal with conflict positively, both internally and in their relationships with judicatory leadership.	Disagree	Unsure	Agree	Strongly Agree
30	The judicatory leadership team actively works to help congregations avoid factionalism, both internally and with other congregations.	Disagree	Unsure	Agree	Strongly Agree
VI. SPIRITUAL LIFE AND WORSHIP					
31	The judicatory has an organized program to resource congregations for faith-nurturing worship.	Disagree	Unsure	Agree	Strongly Agree
32	The judicatory leadership team regularly engages lay and clergy leaders, as well as congregation members, in planning judicatory worship services/events.	Disagree	Unsure	Agree	Strongly Agree
33	The judicatory leadership team regularly engages lay and clergy leaders congregation members in leading judicatory worship services/events.	Disagree	Unsure	Agree	Strongly Agree
34	All internal judicatory work meetings start with an intentional time of Bible study, prayer, and/or devotion.	Disagree	Unsure	Agree	Strongly Agree
35	All external judicatory meetings start with an intentional time of prayer, bible study, and/or devotion.	Disagree	Unsure	Agree	Strongly Agree
VII. FORMATION, EDUCATION, AND TRAINING					
36	The judicatory treats lay and clergy leadership discernment and preparation with equal seriousness and forethought, investing appropriate levels of time, effort, and resources into each.	Disagree	Unsure	Agree	Strongly Agree
37	The judicatory invests equivalent levels of time, effort, and resources into the discernment, formation, and financial support of priests, deacons, and bivocational clergy.	Disagree	Unsure	Agree	Strongly Agree
38	Decisions regarding ordination of clergy are based on validation of the candidate's call rather than whether the judicatory has openings to place them.	Disagree	Unsure	Agree	Strongly Agree
39	The judicatory provides regular opportunities for ongoing training and development after clergy are ordained, based on their assessed needs and input.	Disagree	Unsure	Agree	Strongly Agree

40	The judicatory provides its congregations with training and resources to enable them develop (or adapt) teaching plans that help their members discover and apply their spiritual gifts, and to understand, live out, and share their faith.	Disagree	Unsure	Agree	Strongly Agree
VIII. OUTREACH TO CONGREGATIONS					
41	The judicatory team is generally regarded as a positive force by its congregations.	Disagree	Unsure	Agree	Strongly Agree
42	Judicatory-wide outreach programs planned and implemented as a mutual effort of judicatory and congregational leadership.	Disagree	Unsure	Agree	Strongly Agree
43	The programs the judicatory offers to leaders and congregations are based on validated needs, rather than assumptions.	Disagree	Unsure	Agree	Strongly Agree
44	The judicatory encourages and resources its congregations to collaborate/partner rather than compete with each other.	Disagree	Unsure	Agree	Strongly Agree
45	The judicatory seeks out partnerships/collaboration with other judicatories and organizations.	Disagree	Unsure	Agree	Strongly Agree
IX. LEADERSHIP & ORGANIZATION					
46	Leadership Team – Number and employment status of judicatory staff is adequate to pursue its vision and mission.	Disagree	Unsure	Agree	Strongly Agree
47	Leadership Team – Attention given to vision, values, mission, goals, and priorities.	Little	Some	Quite a Bit	A Great Deal
48	Leadership Team – Deliberations and decisions are transparent and well-communicated to all stakeholders.	Little	Some	Quite a Bit	A Great Deal
49	Leadership Team – Is collaborative and team oriented.	Disagree	Unsure	Agree	Strongly Agree
50	Organizational Agility – Structures and processes are nimble and adaptable to facilitate vision, mission, and experimentation.	Disagree	Unsure	Agree	Strongly Agree
X. STEWARDSHIP					
51	Judicatory leadership wisely invests financial and other resources into strategies and programs to effectively achieve its vision and mission, rather than simply conserving resources and playing it safe.	Disagree	Unsure	Agree	Strongly Agree
52	Judicatory leadership builds its annual operating budget "from scratch" to achieve its vision, mission, and strategies (rather than simply making incremental increases or decreases from the previous year's budget).	Disagree	Unsure	Agree	Strongly Agree
53	The judicatory has a structured process for helping its congregations learn about stewardship principles and best practices.	Disagree	Unsure	Agree	Strongly Agree
54	The judicatory has a structured process to assist struggling congregations in exploring their vitality and sustainability, developing strategies to improve where possible, and to conclude their ministries faithfully when necessary, consistent with their vision and mission.	Disagree	Unsure	Agree	Strongly Agree
55	The judicatory recognizes, values, and deploys the experience and skills of the ordained and lay leaders of its congregations.	Disagree	Unsure	Agree	Strongly Agree
XI. COLLABORATIVE MINISTRY					
56	The judicatory and its congregations engage in mutual collaboration.	Disagree	Unsure	Agree	Strongly Agree
57	The judicatory and its congregations engage in mutual accountability.	Disagree	Unsure	Agree	Strongly Agree
58	The judicatory's leadership facilitates (as opposed to imposes) collaboration between geographically proximate congregations.	Disagree	Unsure	Agree	Strongly Agree
59	The judicatory's leadership facilitates (as opposed to imposes) collaboration between congregations of similar size, mission, goals, and programs.	Disagree	Unsure	Agree	Strongly Agree

60	Programs the judicatory offers to the leadership of its congregations are based on validated needs and congregational input, rather than assumptions or tradition.	Disagree	Unsure	Agree	Strongly Agree
XII. ASSESSMENT & EVALUATION					
61	The judicatory's leadership assesses its congregations' vitality and sustainability on a regular basis.	Disagree	Unsure	Agree	Strongly Agree
62	The judicatory's leadership assesses its own vitality and sustainability on a regular basis.	Disagree	Unsure	Agree	Strongly Agree
63	The judicatory's leadership employs evidence-based assessment methods in its assessment activities.	Disagree	Unsure	Agree	Strongly Agree
64	The judicatory's leadership assesses impact as well as process in its assessment activities.	Disagree	Unsure	Agree	Strongly Agree
65	The judicatory's leadership assesses factors that lead to high clergy turnover and forced termination (e.g., relational isolation, vocational dissatisfaction, lack of boundaries, burnout, misconduct, etc.) and develops strategies to address them.	Disagree	Unsure	Agree	Strongly Agree
XIII. INFRASTRUCTURE					
66	The judicatory's leadership works to ensure that its congregations are located in areas of high missional opportunity (e.g., increasing population, increasing diversity, and a balance of generations).	Disagree	Unsure	Agree	Strongly Agree
67	The judicatory's leadership serves as a resource for its congregations (e.g., providing opportunities and resources to support synergistic collaboration, networking opportunities, and common vision).	Disagree	Unsure	Agree	Strongly Agree
68	The judicatory's leadership supports and works with its congregations to help them ensure that their land and property are inviting to newcomers and members.	Disagree	Unsure	Agree	Strongly Agree
69	The judicatory's leadership works with and supports its congregations to help them best leverage their property and building for the sake of the neighborhoods they serve and in support of their vision and mission.	Disagree	Unsure	Agree	Strongly Agree
70	The judicatory's leadership works with and supports its congregations in discerning when they have reached the end of their lifespan and how to close strategically, consistent with their vision and mission.	Disagree	Unsure	Agree	Strongly Agree
XIV. JUDICATORY-CONGREGATION TRUST					
71	The judicatory considers its congregations and their leaders trustworthy.	Disagree	Unsure	Agree	Strongly Agree
72	The judicatory includes its congregations and their leaders in decision making.	Disagree	Unsure	Agree	Strongly Agree
73	The judicatory fosters independent congregational agency appropriate to denominational theology and tradition.	Disagree	Unsure	Agree	Strongly Agree
74	Judicatory leaders provide a safe space for congregational leaders to speak truth.	Disagree	Unsure	Agree	Strongly Agree
75	The judicatory demonstrates fairness in its dealing with its congregations and their leaders.	Disagree	Unsure	Agree	Strongly Agree
76	The judicatory demonstrates honesty and transparency in dealing with its congregations and their leaders.	Disagree	Unsure	Agree	Strongly Agree
77	Judicatory leadership keeps the promises they make.	Disagree	Unsure	Agree	Strongly Agree
78	The judicatory demonstrates gratefulness for the ministries of its congregations and their leaders.	Disagree	Unsure	Agree	Strongly Agree
79	The judicatory acknowledges the concerns of its congregations.	Disagree	Unsure	Agree	Strongly Agree
80	The judicatory demonstrates accountability to its congregations.	Disagree	Unsure	Agree	Strongly Agree

XV. PROVIDING FOR LEADERSHIP GROWTH					
81	The judicatory presents an attitude of expectation with regard to leadership development.	Disagree	Unsure	Agree	Strongly Agree
82	The judicatory provides for regular leadership development support for clergy and lay leaders (e.g., training, coaching, mentoring, entrepreneurial ministry experiences, communities of practice, etc.).	Disagree	Unsure	Agree	Strongly Agree
83	The judicatory makes relevant information easily available to congregations and their leadership.	Disagree	Unsure	Agree	Strongly Agree
84	The judicatory advocates for relevant, practical, and experiential leadership activities by denominational seminaries, in addition to the expectation of solid theological preparation.	Disagree	Unsure	Agree	Strongly Agree
85	The judicatory encourages and supports non-traditional methods of preparation for ordained ministry.	Disagree	Unsure	Agree	Strongly Agree
XVI. MINISTRY DEVELOPMENT & REDEVELOPMENT					
86	The judicatory strongly encourages church planting, giving priority to locations where it has no congregational presence (e.g., no same-denomination congregations within a 15-min drive).	Disagree	Unsure	Agree	Strongly Agree
87	The judicatory strongly encourages congregational redevelopment, giving priority to locations where there is moderate to high likelihood of increasing vitality and sustainability.	Disagree	Unsure	Agree	Strongly Agree
88	The judicatory provides adequate time and financial resources for new congregations to become self-sustaining (typically 7-10 years with financial support decreasing from 100% to 0% over that time).	Disagree	Unsure	Agree	Strongly Agree
89	The judicatory provides adequate time and support for redeveloping congregations to become vital and self-sustaining (typically 3-5 years) with support levels mutually determined in advanced.	Disagree	Unsure	Agree	Strongly Agree
90	The judicatory encourages its congregations to create new congregations in adjacent areas that have no congregational presence (in collaboration with judicatory leadership).	Disagree	Unsure	Agree	Strongly Agree
SECTION 2: SUSTAINABILITY		(the capacity to survive)			
XVII. SUSTAINABILITY					
91	The judicatory has enough income from its member congregations to support its essential programs, leadership, people, and facilities	Disagree	Unsure	Agree	Strongly Agree
92	Mission Margin – Percentage of the judicatory budget left over for programs/ministries intended to achieve the judicatory's mission after general operating expenses are paid (salaries, office supplies, bills, etc.)	0-10%	11%-25%	26%-50%	Greater than 50%
93	Endowments (corpus or interest), if any, are not used for normal operating expenses of the judicatory, except on a time-limited basis in case of emergencies (if no endowment, select Agree).	Disagree	Unsure	Agree	Strongly Agree
94	The judicatory has a sufficient number of people (staff and congregational volunteers) with sufficient energy to joyfully lead/participate in its ministries/programs.	Disagree	Unsure	Agree	Strongly Agree
95	If our judicatory offices were to close, it would have a significant negative impact on its congregations and the communities they serve.	Neither	Unsure	One of the two	Both