Church Effectiveness Survey

Instructions Booklet

Developing, Administering, and Tabulating the Church Effectiveness Survey

Church Effectiveness Survey Eight Steps

Step One - Read the following instructions **completely** before proceeding.
Step Two - Collect and enter/edit "Church History and Demographics."
Step Three - Add any additional questions or cross-tabulation categories.
Step Four - Promote for three or more weeks before the survey date.
Step Five - Give the survey during all your worship services.
Step Six - Offer make-up surveys for one or two weeks after the main survey date.
Step Seven - Enter your data.
Step Eight - Print and use your results.

The Church Effectiveness Survey (CES) aims to provide a detailed understanding of a church's demographics, spiritual makeup, and perceived and actual effectiveness as a disciple-making entity. One of the major responsibilities of church leaders and staff is to shepherd the flock. According to the Bible, "The Good Shepherd knows His sheep." The CES provides the necessary tools to do this effectively. The survey serves the following purposes:

- To offer an accurate picture of the congregation, demographically and spiritually.
- To understand the congregation's ministry preferences.
- To provide precise information to assess any necessary improvements in the ministry.

The survey includes both pre-defined questions as well as the option to add your own questions. The results of the survey can be analyzed based on standard categories such as age groups and marital status, as well as any additional categories that you choose to include. This analysis is provided for all questions. You can refer to the Appendix for a complete list of the standard categories. The resulting report provides a detailed view of the congregation.

Getting Ready

Let's get started by setting up an organizational account for the church and purchasing your CES license. Once you've completed the purchase, you will receive an email containing a license code. For detailed instructions, please refer to the Appendix. Once the account is set up, continue with the following eight steps.

Step One – Read these instructions thoroughly before proceeding.

Step Two - Collect and enter "Church History."
Some historical and background information needed for your report and analysis must come from your church office rather than from your congregation. See the Appendix to this document for instructions.

Step Three - Add any additional questions or cross-tabulation categories.

A. Your questionnaire contains both pre-defined questions and the option for you to add your own. It is important to note that if you do not have any worship services, adult classes, or small groups, you must indicate this. Before adding your own questions, please review the pre-defined questions thoroughly. For guidance on how to add custom questions and categories, please refer to the Appendix at the end of this document.

B. Your final report will contain cross-tabulations of questions to a set of standard categories. Moreover, any custom questions and categories you have added, as well as the special ones for your service times, classes, and small groups, will be included in the standard cross-tabulation. The Appendix contains a list of the standard categories.

C. It is important to note that you have the option to add as many categories as you want. To learn how to add and organize more categories, please refer to the Appendix of this document. Some useful categories that you may consider adding include inquiries about construction, future plans, financial matters, and questions that are typically asked during a candidate selection process.

D. After you have added questions and categories (if you elected to add any) you will want to:

1. You may print the survey at any time for your review.
2. Review the questions you added to make sure you are satisfied with their wording.
3. Review the added Groups/Categories to ensure that the tabulation criteria (Formulas) are what you want.
4. When you are sure that the survey is complete and accurate, you must Lock the content of the survey after your review. Questions and categories cannot be added or changed without unlocking the survey.
5. Add a link or button to the church website for internet access to the survey. See the Appendix for the proper content of this link.
6. You are now ready to have your congregation take the survey.

Step Four – Promote your survey

Surveys are often misunderstood and devalued by <u>some</u>, while others eagerly look forward to having their say. To ensure that you get the desired results, it's important to promote the survey for at least three weeks before administering it. This promotion should be done both verbally, from the pulpit, and in written communication. The following bullet points are some ideas that you may want to consider including in your promotion:

1. The Good Shepherd knows His sheep. It is important for us to know your needs to meet them.
2. The Bible exhorts us to get the facts before making decisions. A survey is merely an efficient way of doing this. (Pv. 18:13; Lk. 14:28-32).
3. Each of you is a part of our body. We need the commitment of everyone to get the information needed.
4. Taking 30 minutes to complete our survey during a Sunday service will make every Sunday service for the next two years more fruitful. This is simply good stewardship.
5. This survey is anonymous, so you can be completely honest.
6. (If given during a staff search) This is a way for every person to make their desires heard as we choose our next staff member.

Step Five – Give your survey

Administering a survey may seem straightforward, but it is only so if done correctly. Obtaining accurate information requires thorough preparation and consistent application of several key principles. As the saying goes, "garbage in – garbage out." This sentiment is echoed in Proverbs 21:5, which states that diligent planning leads to success, while haste leads to failure. To ensure the accuracy of your survey results, please carefully follow the suggestions outlined below.

1. Understand who needs to take your survey.

To ensure that a survey accurately represents a larger group, it needs to be conducted with a "representative sample." If the individuals taking the survey are not representative of the group, the data collected will be inaccurate. To obtain a representative sample of your congregation, you must conduct the survey at a time when everyone has an equal chance of attending. For churches, this would only be during their usual worship service. Conducting the survey during Sunday school, after the worship service, or at a special meeting may exclude less committed and fringe members, leading to skewed results. Similarly, sending surveys home with your congregants can result in the loss of over half the surveys and affect the results. Therefore, it is crucial to conduct the survey during a normal worship service, and everyone should be encouraged to participate.

2. Understand what taking this survey will look like. Thousands of churches have taken surveys like this one in a worship service. To be most successful, many churches adjust their meeting format on this day.
    a. Some lengthen their worship hour by approximately 15 minutes to accommodate the survey.
    b. Others just have an abbreviated worship time of 20 to 30 minutes, and then give the survey.
    c. It generally takes an average person around 38 minutes to complete the survey. However, some may be able to finish it within 25 to 30 minutes, while others may require up to 50 minutes. It is advisable to conduct the survey towards the end of the service, so that those who take longer can complete it without any time constraints. In general, the survey time will look like this:
        i. Before starting any task, it is essential to have clear instructions. The instructions should be provided upfront and presented on a projector screen, if possible. Include a web link in the instructions, preferably a short code or QR code. This can be displayed on the projector screen or printed on paper if necessary. For more detailed guidance on how to set up the link and/or QR code, please refer to the Appendix.
        ii. If possible, children younger than High school need to be dismissed from the worship center.
        iii. Request that everyone with a smartphone or smart device open the web link. Ask those without a device to raise their hand to receive a paper copy of the survey.
        iv. Someone will read the instructions to the congregation. (This may be done <u>while</u> surveys are being handed out.)
        v. The congregation will take the survey, seated in the worship service.
        vi. Soft Christian music may be played in the background.
        vii. People with questions will raise their hands, and a leader will <u>come to them</u> to provide answers.
        viii. When finished, those who took the paper survey will turn in their surveys at a designated location. They will then leave the service area. It is also best if they do not linger outside the service area.
        ix. You may have people who have poor eyesight, do not read well, or are just obsessive and take longer to finish. If you have multiple services, invite anyone

not finished to move to another room to finish. Remind them that their input is important and to please finish their survey.

x. If you have visitors (and we hope you do,) here are 3 options.

Option 1 - You may simply welcome visitors as usual, tell them that you are a church that cares about the needs of its people, and invite them to take the survey based on what they have already experienced as a visitor.

Option 2 – You may invite them to meet with the friends who brought them and a church leader (in a small room with coffee and snacks) and discuss what they are looking for in a good church and their recent "church shopping" experience. Then, tell them how your church meets these needs.

Option 3 – Invite them to choose either option 1 or 2.

3. Be sure you have the proper materials. To give this survey, you should have:
   a. Most everyone will use their smart phones to take the survey. Make sure the link is tested before the service.
   b. Make sure you have sufficient paper surveys and pins or pencils for those who do not have smart devices.
   c. A box to collect paper surveys.
   d. A box to collect pins and pencils.

Step Six - Give a "Make-up" survey

In North American churches today, an average of 20% to 50% of "regular attenders" may be absent on any given Sunday, but over 80% will be present at least once every three Sundays. To get the best result, we encourage you to schedule a "Make-up" survey on each of the two Sundays following your main survey date. Simply set aside a room and have those previously absent to take the survey at the regular time they would worship. Then, do not wait any longer. Tabulate your results.

Step Seven - Enter your data

After the survey has been completed, the data from the paper surveys must be entered into the CES system for tabulation. Those taken on a smart phone or device are entered into the database as the answers are being entered. You will need to collect all the paper surveys and arrange for the data entry process. Data entry may be accomplished on any computer or tablet with internet access and may be performed by any number of data entry personnel. See the Appendix for instructions on the data entry process.

Step Eight - Generate and Print Report

Once all survey forms have been entered, you need to close the survey.

CAUTION: Once the survey is "Closed," no additional data can be added. Ensure all surveys are included before closing the report.

You may view the results of your survey in three reports:

1. **Full Diagnostic Report**

This report is very detailed information intended to equip the church leaders to understand the congregation the church so they can bring God's Word and God's people together effectively.

2. **CES Data Concordance**
   This report provides all the statistical data results of the survey. It is incredibly detailed and may be used to gain greater insight into the details of the Full Diagnostic Report.
3. **Graphs**
   This includes stand-alone copies of the graphs included in the Full Diagnostic Report and are primarily intended to be use in any presentation that might be given to the congregation or Board.

You will have the option to download, save, and print your report(s). You may want to select, download, and save all three versions so that you can view, print, or email these as many times as you like. You may also return and rerun the reports as often as you wish. If your church performs another survey sometime in the future, you will still be able to print/view this report to compare it with your future data.

SURVEY DIRECTIONS

One of the major responsibilities of Church leaders and staff is to shepherd the flock. The Bible tells us that "The Good Shepherd knows His sheep." To do this effectively, your leaders are asking that all people, high school age and older, take a brief survey. The purpose of this survey is:

1. *To give us an accurate picture of our congregation (The Good Shepherd knows His sheep).*
2. *To gather your preferences for ministry.*
3. *To make any needed improvements in our ministry.*
4. *(If appropriate) To allow every person to "Have their say" as we choose our next staff member.*

Please be assured that we are committed to using this information so that the greatest number of people have their needs met. Of course, it would be impossible to satisfy every personal desire, but we will do all we can to serve you in this.

Here are your instructions:

1. *You will take this survey on your smartphone or device. If you do not have a device, a paper version of the survey is available. When told to do so, raise your hand, and someone will bring you bring you a paper copy and a pencil. This is one of the few times we will encourage you to use your phone in church. You can only take the survey once per device.*
2. *This is an anonymous survey. Please do not put your name on any form.*
3. *Please read each question carefully.*
4. *You will simply touch or click the selected answer using the online form. When using the paper survey, circle the appropriate response number.*

PLEASE RAISE YOUR HAND IF YOU HAVE A QUESTION, AND SOMEONE WILL COME TO YOU AND HELP YOU FIND AN ANSWER.

This survey should take about 30 to 45 minutes to complete. When you complete the online survey, your responses will be automatically recorded. Please leave the room so as not to disturb those still taking the survey. Turn in your paper surveys and pencil as you leave when you have finished. Thank you.

NOTE TO PROCTORS:

If your church has added additional questions to the standard 120 questions, the survey will take longer to finish. It is often helpful to lovingly "prompt" the congregation.

Every five minutes, you might say, "Most of you should be finished with question ______ by now. If not, you might want to speed up just a little."

I. Tabulating Categories

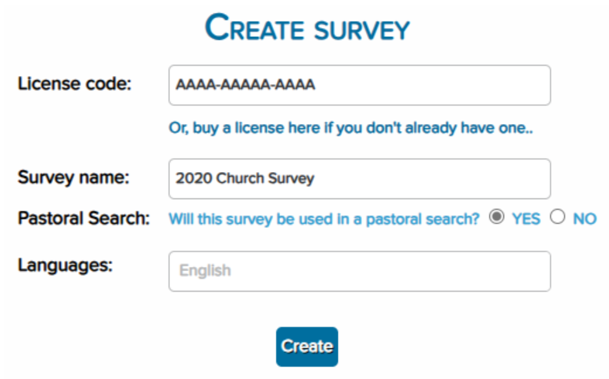
The survey includes pre-defined questions and the option to add your own questions. The results of the survey can be analyzed based on standard categories as well as any additional categories that you choose to include. This analysis is provided for all questions. The following is a complete list of the standard categories.

1. Total congregation – Everyone answering the survey.
2. Male – All males answering the survey.
3. Female – All females answering the survey.
4. Builder – People born before 1946.
5. Boomer – People born between 1946-1964.
6. Buster – People born between 1965-1983.
7. Millennial – People born 1984-2001.
8. Post-Millennial – People born after 2001.
9. Senior High – High school students.
10. College Class - People between 18-30 years old.
11. Young Singles - Singles between 18-24 years old.
12. Career Singles - Singles between 22-40 years old.
13. Older Singles - Singles between 35-50 years old.
14. Mature Singles - Singles between 45-65 years old.
15. Single Men > 65 - Single men over 65 years old.
16. Single Women > 65 - Single women over 65 years old.
17. Single Parents - Single parents.
18. Young Married, w/o kids - Married couples, between 18-35 years old, without kids.
19. Couples with Pre. Sch. - Married couples whose oldest child is in preschool.
20. Couples w/ Elem. – Married couples whose oldest child is in elementary school.
21. Couples w/ Youth – Married couples whose oldest child is in junior/senior high school.
22. Empty Nesters – Parents between 40-65 years old whose children have left home.
23. Mature Adults – Couples over 65 years old.
24. Visitor – A person just visiting your church but not yet a regular attender.
25. Attender – A person attending frequently but not a member.
26. Member – A member of your church.
27. Staff – Paid (not secretarial or custodial) staff member.
28. Board Member – Member of your church's highest governing board.
29. Leader/Worker – Group/class leader, board/committee member.
30. Non-worker – Attender, not involved with a church-related ministry.
31. Search Committee Member – All people now on your search committee.
32. Attends adult classes Regularly – Attends Sunday school more than five out of ten Sundays.
33. Attends small groups Regularly – Attends small group more than five out of ten weeks.
34. Attends discipleship. Regularly – Attends an individual discipleship over five out of ten weeks.
35. Attends SS & SG Regularly – Attends both SS and small group more than five out of ten weeks.
36. Non-Christian – A person who has not yet received Christ as their personal savior.
37. Maturity Lev. 1 – Lowest spiritual growth level, seeker through salvation and basic beliefs.
38. Maturity Lev. 2 – Second spiritual growth level, developing basic habits and apprenticeship.
39. Maturity Lev. 3 – Third spiritual growth level, virtues, character, training disciples.
40. Maturity Lev. 4 – Continuing growth after level. 3, training disciplemakers.
41. Functional Mat. Lev. 1 – reached Mat. Lev. 1 or backslidden to this level.
42. Functional Mat. Lev. 2 – reached Mat. Lev. 2 or backslidden to this level.
43. Functional Mat. Lev. 3 – reached Mat. Lev. 3 or backslidden to this level.
44. Functional Mat. Lev. 4 – reached Mat. Lev. 4 and continuing at this level.
45. Might Leave – People that have indicated in the survey that they plan to leave the church.

II. Collecting History and Local Demography Information

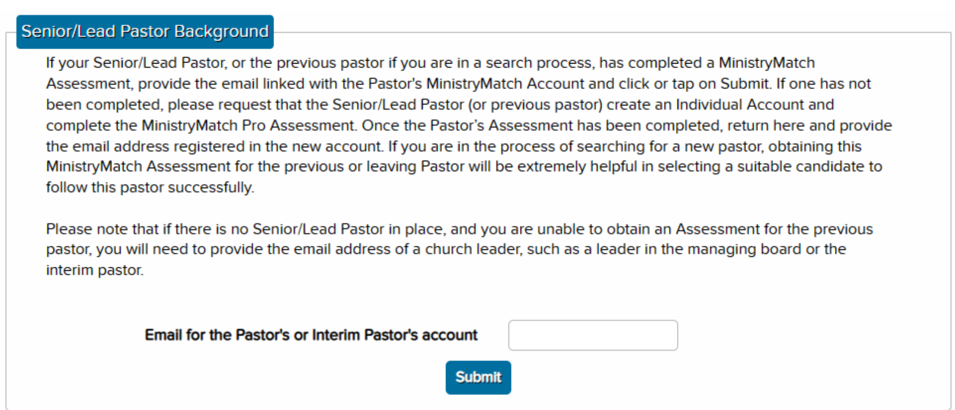
Once you have obtained your CES License Code, you will need to log in to your Organization Account and create a new Survey by selecting the 'Church Effectiveness Survey' Activity and 'Create Survey' option.

a. You will then enter your license code and give your survey a name.

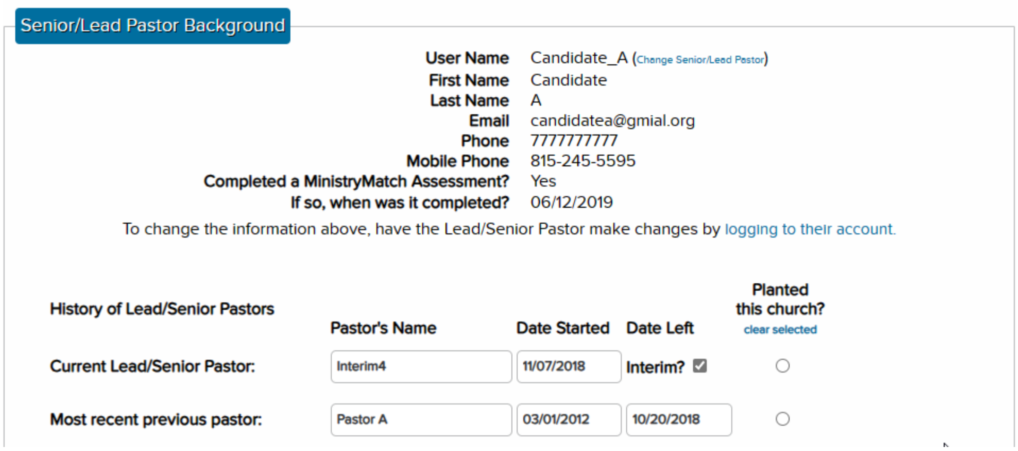


b. You will then be presented with an input form showing the basic contact information you entered when creating your account. You may edit that information if needed:

c. And you will be required to enter the email address of the current or past lead Pastor. Carefully read the instructions in this panel:



d. On the next screen, you will be asked for some detailed demographic information regarding the history of your church. This data will be used in the statistics of your report. Some of this data is “required.” We **KNOW** that many churches do not keep records of some of this data. Please do your best to find or calculate it. If you cannot calculate it, find 3-5 persons in your church who know the most about it and have them **guess or estimate** this info to the best of their ability. Your best guess is better than nothing! Local demographics can usually be easily obtained from your city planning commission, realtors, or from the internet.


Senior/Lead Pastor Background

User Name: Candidate_A (Change Senior/Lead Pastor)
First Name: Candidate
Last Name: A
Email: candidatea@gmial.org
Phone: 7777777777
Mobile Phone: 815-245-5595
Completed a MinistryMatch Assessment?: Yes
If so, when was it completed?: 06/12/2019

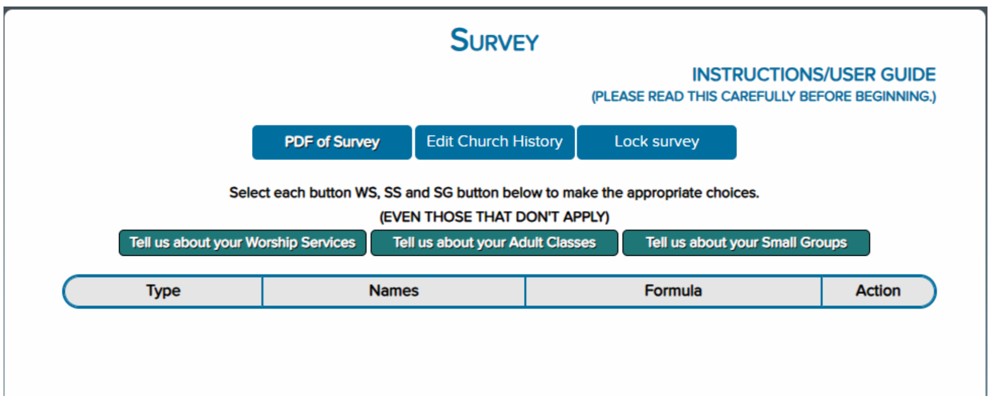
To change the information above, have the Lead/Senior Pastor make changes by logging to their account.

History of Lead/Senior Pastors	Pastor's Name	Date Started	Date Left	Planted this church? clear selected
Current Lead/Senior Pastor:	Interim4	11/07/2018	Interim? ☑	○
Most recent previous pastor:	Pastor A	03/01/2012	10/20/2018	○

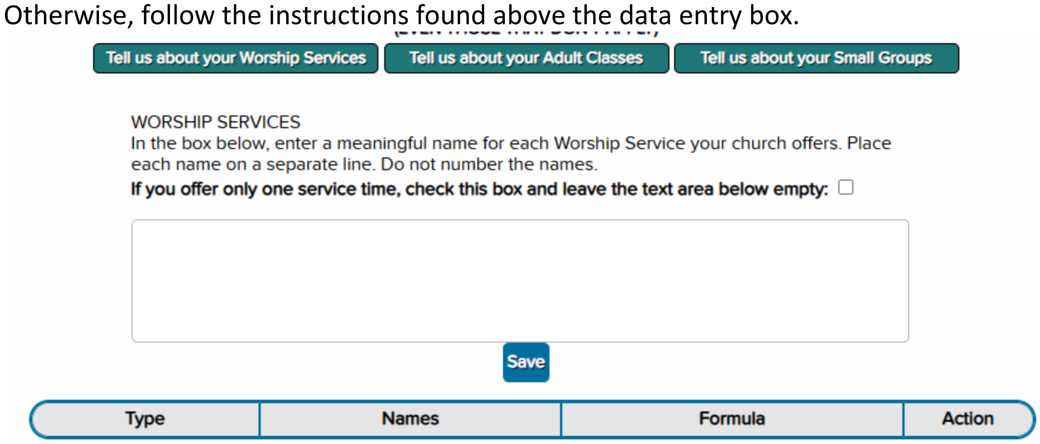
III. Adding Additional Questions and Tabulation Categories

After completing the “Church History and Demographics, you will start the process of adding questions and tabulation categories specific to your church, beginning with your worship services, classes, and small groups.

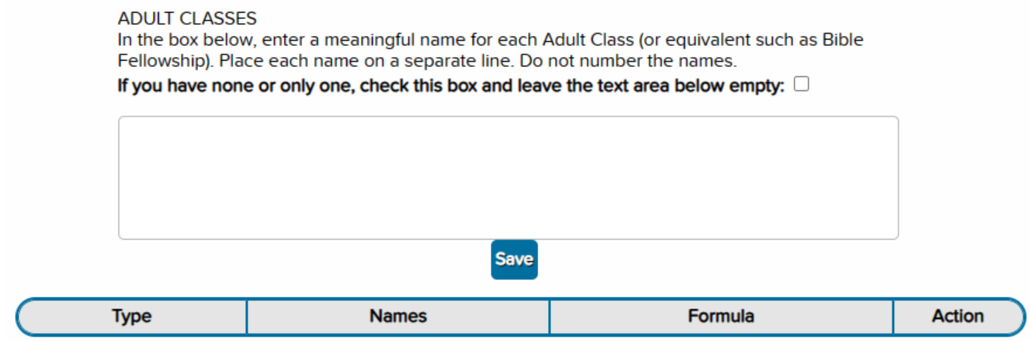
a. On this initial page, you will add tabulation categories for each Worship Service, Adult Class, and Small Group in your church. This is required and will increase the power of your results many times over. Even if you only have one worship service and no classes or small groups, you are required to specify that information.



b. First, define your worship service names and times. If you only have one service, select the checkbox, save that selection, and move to the next section.
Otherwise, follow the instructions found above the data entry box.



c. Next, select the Adult Classes button even if you have none, and either select the checkbox, save the selection, and move on to the next section, or follow the instructions above the data entry box.



d. Next, select the Small Group button even if you have none, and either select the checkbox, save the selection, and move on to the next section, or follow the instructions above the data entry box.
e. Your next step is to add any desired special questions and tabulation categories of your own. You will see the following when you first enter the Church Effectiveness Survey application.
f. There are 120 standard questions in the Church Effectiveness Survey. You may review these standard questions by clicking the “PDF of Survey” button on the Survey screen. At this point, you may add as many Custom Questions and Custom Categories as you need or desire. These additional questions, responses, and categories will help you customize your survey to your church. Examples of such additional questions are:
    1. I approve of the new education building and will support it financially.
    2. We should have an interim pastor instead of going pastor-less until we call our next pastor.
    3. I will attend the new church plant.
    4. To help us best choose our next pastor, which of the following eight preaching styles most ministers to you:
    5. What do you see as the most important role for our next ministry leader?

You should carefully develop in writing all the Custom Questions with the appropriate responses/selections for each Question and all Custom Tabulation Categories you wish to add prior to beginning to add any of them to the Survey. Examples of Tabulation Categories that you might add are:

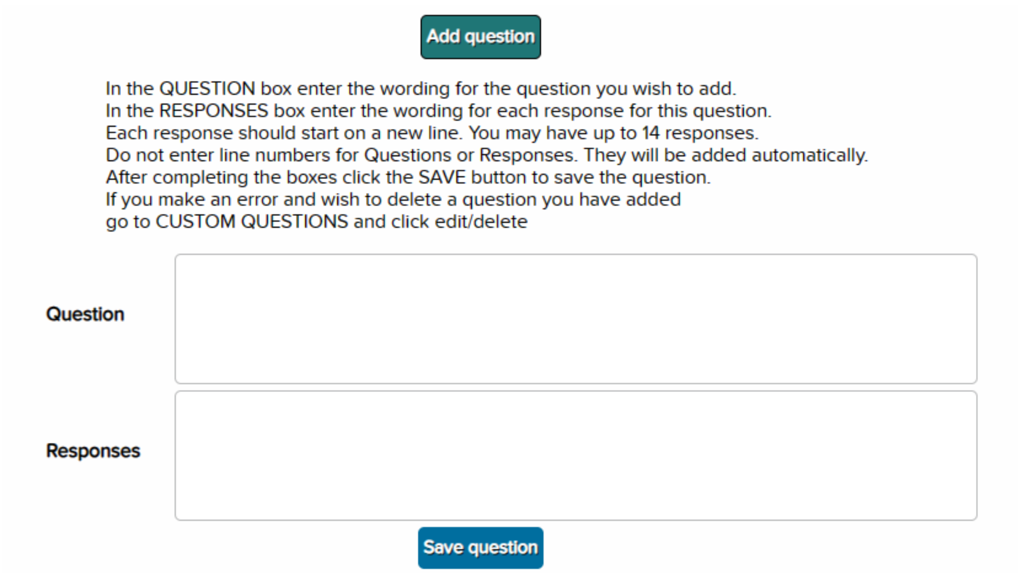
1. Financially support the Education building
2. Persons going to the Church Plant
3. Approve new Philosophy of ministry

Categories provide a grouping for tabulated data, such as how many men or women are in the custom category.

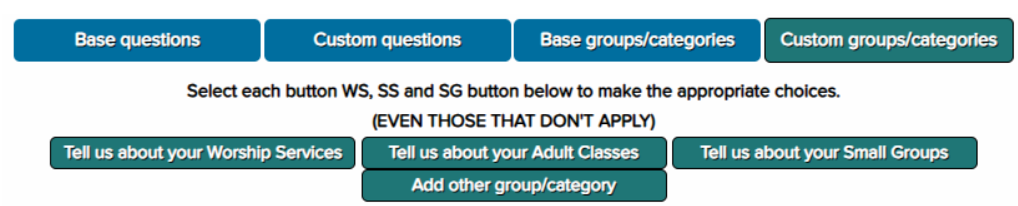
b. To add custom questions, responses, and categories, select 'Survey' from the menu line and then select the 'Custom questions' button to add one of your custom questions.

c. Select the 'Add question' button.

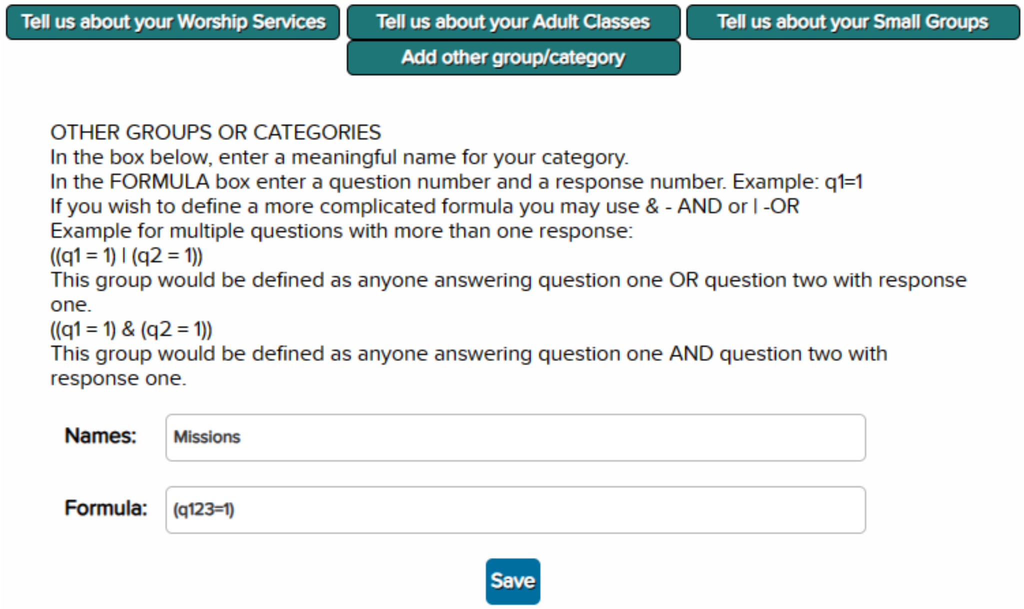
d. Follow the instructions that will appear after clicking the 'Add question' button and click the 'Save question' button when finished with each question.



e. To add a new category, click the 'Custom groups/categories' button and then the 'Add group/category' button.



f. Here you will define a custom category and the formula needed to tabulate that category. See the example given in this image. In this example, we have chosen to create a category for persons wanting to sell our 5 acres for missions. (see the custom question example above). When we created the question, which became question 123, response 1 is for the selling the land for missions; 2 is for paying off debts; 3 is for building an education wing and 4 is for building a soccer field. Therefore, we will have four new custom categories; Missions, Debts, Education, and Soccer. The 'formula' for these categories will be (q123=1) for Missions, (q123=2) for debts, (q123=3) for Education and (q123=4) for Soccer. Custom Category Formulas may be this simple or as complex as needed.



g. You may want to print the complete survey with the custom questions and categories for final review and agreement. Once all custom questions and custom categories have been defined, you will want to Lock the survey. Locking the survey simply means that no new questions or categories may be added while the survey is Locked. You are now ready to follow the Church Effectiveness Survey Instruction booklet directions to administer the survey.

IV. The CES WebSurvey app link/address

It is important to properly set up and test the link for the online WebSurvey app. The definition of this link is simply the web address used to set up and create the survey followed by "*/websurvey?sid=churchId*" where "*churched*" is replaced by the churches unique ID (account number). This is the number before the dash found on the church account page, for example 9 in this sample.

Complete the form below before proceeding with the Church Effectiveness Survey.

Church Contact Information

Church name	4 Larger Church
Church unique ID	9 - 85
Church Denomination	General Association of Regular Baptists
Address	Dip street
Address	
City, State Postalcode	Clear Water, MI 35792
Website	http://guess.org
Church phone	444-555-2222
Church email	nomail@gmial.org
Contact name	My name
Contact phone	555-333-4444
Contact email	myname@gmial.org

To make changes to this information, use the *My Account* menu option.

in this case, the web address for the online survey app would be:
https://cpn.convergeplacementnetwork.org/websurvey?sid=9.

However: it is advisable, if the church has someone with the skills to do so, to create a button or text link on the church website that will move the user to this address. Such a button might be something like this:

Church Survey

Then the survey taker can be directed to go to the church website on their phone and tap the button to start the survey.

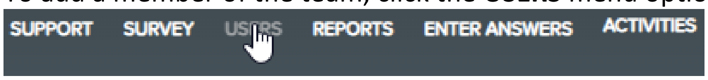
V. The Data Entry Process

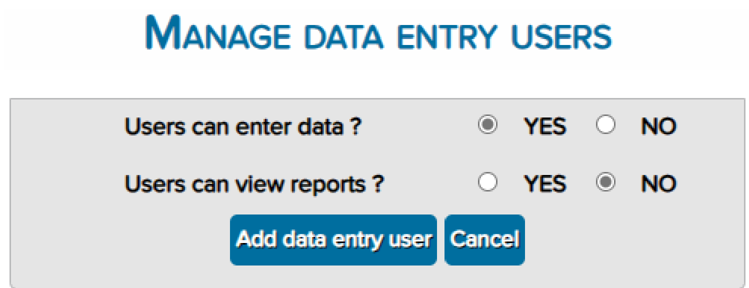
All surveys taken online with a smartphone or other device will have already been entered into the survey database. Surveys taken on paper, if any, will need to be entered into the database by staff or volunteers. To do so:

One: Collect all surveys that were filled out.

Two: Assemble the team that will be doing the data entry. You will provide each member of this team with user login credentials.

1. To add a member of the team, click the **USERS** menu option:

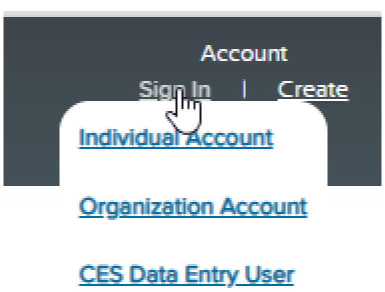




2. Select the appropriate options for the user, and click **Add data entry user**:

3. Record the information and provide it to each data entry team member. Ensure that no two people are given the same user credentials. You may have as many data entry team members as you wish.

4. Data entry team members can log in to the CES application by first selecting **Sign In** and then **CES Data Entry User**.



5. Once signed in, they must click the **ENTER ANSWERS** option.

Three: The data entry team members then use their keypads to enter the responses for each question on the survey. The "tab" key will move the cursor to the next box.

It is a good practice to pause a few times during each survey to ensure that the question you are recording corresponds to the question number displayed on the screen. To improve accuracy and speed, working in pairs can be very beneficial; one person reads the question number and response aloud, while the other enters the data.

IMPORTANT: If a person does not answer a question, leave the box blank.

Four: Once a survey has been recorded, the data entry team member should press tab and then **ENTER**, or click **Save answers**. At this point, the team member may begin to enter the next person's survey data.

Notes:

1. Whenever you leave a survey entry screen, whether you go to the next screen or simply exit, the data is automatically saved.
2. It is a good idea to write "finished" or, in some way, mark surveys that have been completed.

Five: Once all survey forms have been entered, you must CLOSE the survey. This is necessary to preserve the integrity of the survey. Once the survey is closed, no additional forms may be entered, and no changes can be made to previously entered data. Once the survey is closed, you will be able to print any of the reports available from the Reports menu choice.