Church Effectiveness Survey

Instructions Booklet

**Developing, Administering, and Tabulating
the Church Effectiveness Survey**

Church Effectiveness Survey Eight Steps

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

The CCE Church Effectiveness Survey provides a detailed picture 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. The Bible tells us that "The Good Shepherd knows His sheep." The CCE Church Effectiveness Survey provides the tools for you to do this effectively.

The purpose of this survey is:

1. To give an accurate picture of the congregation.

2. To understand the congregation's preferences in ministry.

3. To provide accurate information in order to evaluate any needed improvements in ministry. The survey consists of 120 predefined questions. You may add additional questions of your own. The results of the survey are cross-tabulated, with 45 cross-tabulation categories for each of the questions. The resulting report gives you an incredibly detailed view of your congregation.

To begin, please set up a free organizational account and purchase your survey. You will receive an email with a license code. Select "Applications," then "Church Effectiveness Survey," then "Create survey" and enter your license code to begin.

Select "Return." This will return you to the survey. Then proceed with the following eight steps.

I. Step One – Read these directions completely before going on.

II. Step Two - Collect and enter "Church History."

Some information in your report and in database analysis must come from your church office rather than from your congregation. See the appendix to this document for instructions.

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

A. Your questionnaire consists of 120 pre-defined questions. You may add questions of your own, however, you must add information about your worship services, adult classes, and small groups. If you have none of these, you are required to indicate that. Before adding questions, please read the pre-defined questions. Please see the appendix to this document for instructions for adding custom questions and categories.

B. Your final report will cross-tabulate questions to 45 standard categories. In addition, your custom questions and categories that you add and the special questions and categories for your service times, classes and small groups will be added to the standard cross-tabulation. The 45 categories are listed here:

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 persons now on your search committee

32. Attd. SS Reg. – Attends Sunday school more than five out of ten Sundays
33. Attd. SG Reg. – Attends small group more than five out of ten weeks
34. Attd. DSPL. Reg. – Attends individual discipleship more than five out of ten weeks
35. Attd. SS & SG Reg. – 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 lev. 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

Your survey will give you insightful information about each of these categories.

Please note that you may add an unlimited number of additional categories. See the appendix to this document for instructions for adding and tabulating additional groups/categories. Valuable categories that you may want to add include questions about building, new directions, finances and questions used in a candidating process.

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

1. Review the added Church Effectiveness Survey (CES) questions, and make sure you are satisfied with their wording.
2. Review the added Groups/Categories and ensure that the tabulation criteria (Formulas) are what you want.
3. You may print the survey at any time for your review by clicking Print.
4. When you are sure that the survey is complete and accurate, you must freeze the content by clicking Lock survey. You will receive a warning that after the survey is "locked," questions and categories cannot be added or changed without unlocking the survey.
5. Print the CES by clicking Print.
6. You are now ready to have your congregation take the survey.

IV. Step Four – Promote your survey

Some people misunderstand and de-value surveys. Just as many others look forward to "having their say." To get the results you want, you will need to promote this survey for three or more weeks before giving it. This should be done verbally from the pulpit, as well as in written communication. The following bullet points are ideas you may want to include in your promotion:

The Good Shepherd knows His sheep. It is important for us, as your leaders to know your needs in order to meet them.

1. 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).
2. Each of you is a part of our body. We need the commitment of every person to get the information we must collect.

3. 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.
4. This survey is anonymous so you can be completely honest.
5. (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.

V. Step Five – Give your survey

On the surface, administering a survey appears to be simple. But this is only true if it is done properly. Getting accurate information requires careful preparation and the consistent application of several important principles. The world puts it bluntly, "garbage in – garbage out." The Bible agrees. "The plans of the diligent lead surely to advantage, but everyone who is hasty comes surely to poverty," Prov. 21:5. To ensure accurate results for your survey, please carefully apply the following suggestions.

A. Prepare to Give Your Survey

1. Understand who needs to take your survey.

   A survey needs to be a "representative sample" of a larger group. If the people taking the survey are not representative – that is, if they are more committed, or older, or longer tenured than the congregation, then your data will not be accurate. Therefore, you will need a truly representative sample of your congregation.

   To get a representative sample, you must give your survey at a time that everyone has an equal probability of attending. For churches, there is only one such time – the normal worship service. Having given over 1000 individual church surveys, we know exactly what happens when other approaches are taken. Giving the survey in Sunday school, after the worship service, or at a special meeting leaves out the less committed and fringe people and skews your results. Sending surveys home with your congregants affects results in the same way, and results in the loss of over half the surveys. To get accurate results, you must give this survey IN a normal worship service. Everyone needs to be exhorted to take the survey.

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 shorten their Sunday school hour and 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. Completing the survey will take an average person about 38 minutes. Some will finish in 25 to 30 minutes, and others may require up to 50. It is usually best to give the survey at the end of an hour so that the time is open-ended for those who take longer. In general, the survey time will look like this:

      i. Children younger than high school age will be dismissed from the worship center.
      ii. Ushers will pass out surveys and pencils (with erasers).

iii. Someone will read the instructions to the congregation. (This may be done <u>while</u> surveys are being handed out.)

iv. The congregation will take the survey, seated in the worship service.

v. Soft Christian music may be played in the background.

vi. People with questions will raise their hands, and a leader will <u>come to them</u> to provide answers.

vii. When finished, people should turn in their surveys and pencils into a box in the back of the room. They will then leave for Sunday school or to go home.

viii. You may have persons 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 <u>finish</u> their survey.

ix. How to handle visitors on this Sunday. In your promotion, we recommend that you discourage your congregation from picking "Survey Sunday" to invite visitors. However, 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 <u>cares</u> 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 plus a church leader (in a small room with coffee and snacks) and dialog with them about what they are looking for in a good church, and their recent experience 'Church shopping.'" 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. Enough surveys for every person, high school age and older, in your congregation.

   b. Enough sharpened pencils with erasers for everyone.

   c. A pencil sharpener.

   d. A box to collect surveys.

   e. A box to collect pencils.

B. Give Your Survey

When the time comes to give your survey, hand out surveys and pencils, and read the following or similar directions to your congregation:

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 here in the service. 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:

The ushers are passing out a survey to every person high school age or older, along with pencils.

1. *This is an anonymous survey. Please do not put your name on any form.*
2. *Please read each question carefully.*
3. *Please answer each question by circling 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 have finished, please turn in your survey and pencil. 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."

VI. 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. Do not allow persons to take surveys home.

VII. 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. You will need to collect all the 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 to this document for instructions on the data entry process.

VIII. Step Eight - Generate and Print Report

Once all survey forms have been entered, click Survey to return to the Survey screen. Now you need to close the entire survey by clicking "Close survey."

CAUTION: Once you have "Closed" the entire survey, the data entry portion of this program will be disabled, and no more survey data can be added. Before the report is "Closed," be sure all surveys have been included.

You may view the results of your survey in three reports:
1. **Full Diagnostic Report**
2. **CES Data Concordance**
3. **Graphs**

To generate any or all three of these reports, click the "**Reports**" menu option. Afterward, 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 later to this screen to rerun the reports as often as you wish. If your church preforms another survey sometime in the future, you will still be able to print/view this report to compare with your future data.

I. **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. To do so:

    a.   Select the 'Church Effectiveness Survey' Application:

    b.   Then click on the 'Create Survey' button

    c.   On the next screen, enter your license code and give your survey a name:

    d.   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:

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

f. 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.

II. Adding Additional Questions and Tabulation Categories

a. After completing your "Church History and Demographics," your second 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. At this point you may edit you church history data if changes are needed, or obtain a PDF document of the 120 standard questions for printing. Otherwise, your next required step is to provide information about your worship services, adult classes and small groups, if any.
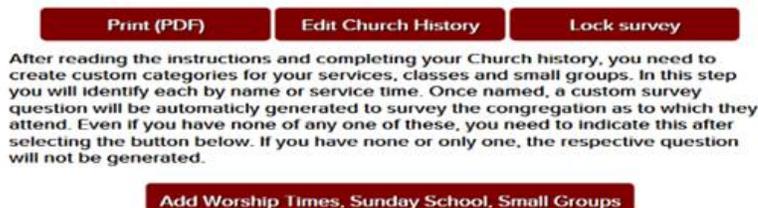
To begin, select the 'Add Worship Times, Sunday School, Small Groups' button. On the resulting page, you will add tabulation categories for each worship service, Sunday school (if you have any) and small group (if you have any) in your church. This is required and will increase the power of your results many times over. Even if you only have one worship service and no classes or small groups, you are required to specify that information.

As previously stated, there are 120 standard questions in the Church Effectiveness Survey. Additionally, 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 8 preaching styles most ministers to you:
5. What do you see as the most important role for our next ministry leader?

At this point, you will want to develop all the Custom Questions with the appropriate responses/selections for each question, and all Custom Tabulation Categories you wish to add. 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.

Print (PDF)	Edit Church History	Lock survey	
Base questions	Custom questions	Base groups/categories	Custom groups/categories

Add question

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

Add question

In the "Question" box enter the wording for the question you wish to add.
In the "Responses" box enter the wording for each response for this question.
Each response should start on a new line. You may have up to 14 responses.
Do not enter line numbers for Questions or Responses. They will be added automaticly.
After completing the boxes click the "Save" button to save the question.
If you make an error and wish to delete a question you have added
go to "Custom questions" and click edit/delete

Question

The best use of the 5 acres behind the baseball diamond is:

Responses

Sell it and use the money for missions
Sell it and pay off our debts
Sell it and build an education wing
Keep it and build a soccer field

Save question

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

Base questions	Custom questions	Base groups/categories	Custom groups/categories

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.

Print (PDF)	Edit Church History	Lock survey

Base questions	Custom questions	Base groups/categories	Custom groups/categories

Select each button below to make the appropriate category additions.

Add Worship Services	Add Adult Sunday Schools	Add "Small Group" Groups	Add other group/category

OTHER GROUPS OR CATEGORIES
In the box below, enter a meaningful name for your category.
In the "Formula" box enter a question number and a response number. Example: q1=1
If you wish to define a more complicated formula you may use "&" - AND or "|" -OR
Example for multiple questions with more than one response:
((q1 = 1) | (q2 = 1))
This group would be defined as anyone answering question one OR question two with response one.
((q1 = 1) & (q2 = 1))
This group would be defined as anyone answering question one AND question two with response one.

Names: Missions

Formula: (q123=1)

Save

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 Data Entry Process**

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 of the data entry team members. 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**.
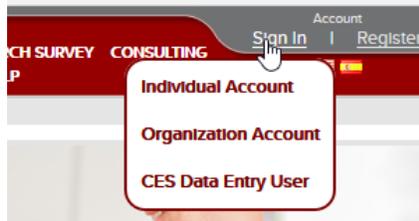
5. Once signed in, they can click **ENTER ANSWERS**.

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 idea to stop a few times in each survey to be sure that the question you are recording matches the question number on the screen.

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 already been completed.

3. It can be beneficial for two people to do the data entry together – one to read the numbers out loud and one to enter them. This is faster and more accurate!

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.