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### Gospel Impact and Stewardship Tool (Gist): Visual Mapping to Discover Gospel Imperatives for Strategic Ministry Decisions

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#### Recommended Citation

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GOSPEL IMPACT AND STEWARDSHIP TOOL (GIST):  
VISUAL MAPPING TO DISCOVER GOSPEL IMPERATIVES FOR STRATEGIC  
MINISTRY DECISIONS

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A Major Applied Project  
Presented to the Faculty of  
Concordia Seminary, St. Louis,  
Department of Practical Theology  
in Partial Fulfillment of the  
Requirements for the Degree of  
Doctor of Ministry

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By  
Martin Edward Lee  
December 2021

Approved by:	Dr. David Peter	MAP Advisor
	Dr. Leonardo Sanchez	Reader
	Dr. Benjamin Haupt	Reader

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To our children,  
Kyle, Kelsey, Justin, Rachel, and Katie,  
for whom we pray our dear church will remain faithful under-stewards,  
equipped to feed and care for them and our children's children until the time  
when Michael rises to signal Christ's triumphant return.

“I was glad when they said to me,  
‘Let us go into the house of the Lord’”  
(Psalm 121:1 NKJV).

“If anyone does not provide for his own, and especially his own household,  
he has denied the faith and is worse than an unbeliever”  
(I Timothy 5:8 NIV).



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## ACKNOWLEDGEMENTS

I owe many thanks to Peter Alexander, Dean of Faculty at Lutheran Transitional Ministry Association. Peter heartened me as a student, practitioner, and now fellow faculty member. His keen understanding of how God acts within the emotional-relational systems created where two or more are gathered has transformed the way I function in ministry. In Peter, God has blessed me with an incredible mentor and friend.

I am also indebted many lifetimes over to my “woman,” Anne, who helped synthesize the major theological concerns of interest to this study and provided academic support. Anne invested thousands of hours in dialogue with me on such topics as God’s hiddenness in the physical realm and the relatedness of the spiritual and physical realms to accomplish God’s plan of salvation. Without her, my learning would not have advanced to the degree it has and this project would never have emerged in written form. “She shall be called Woman because she was taken out of Man” (Genesis 2:24). “For whatever the husband possesses, is possessed and held by the wife also. Not only is all their wealth possessed by them in common, but their children also, their food, their bed, and their habitation. Their wishes are also equal. So that the husband differs from the wife in no other thing than in sex” (Luther). This major applied project is as much hers as it is mine.



## ABBREVIATIONS

CTCR	Church Theology and Church Relations
ELCA	Evangelical Lutheran Church of America
GIST	GOSPEL IMPACT STEWARDSHIP TOOL
IIM	Intentional Interim Ministry
IIP	Intentional Interim Pastor
LCMC	Lutheran Congregations in Mission for Christ
LCMS	Lutheran Church—Missouri Synod
LUTMA	Lutheran Transitional Ministry Association
PLC	Palisades Lutheran Church

## GLOSSARY

**Administration Costs:** Costs incurred by those who oversee operating affairs, such as a business manager, bookkeeper, or attorney.

**Congregational Stewardship:** Congregational members collectively stewarding God's human and material resources in the local congregation, participating in God's economy.

**Direct Expenses:** Costs incurred as a result of a particular ministry or partner ministry.

**Dual Bottom Line:** A measurement of total outcomes in both financial and evangelistic (Gospel) effectiveness.

**Economy of God:** All of the activity of the Triune God to distribute Himself into humanity for the benefit of those in His household.

**Financialization:** The increase in size and influence of the financial sector over the rest of the economy.

**Financial Sustainability:** An assessment of long-term financial health.

**Financial Viability:** An assessment of short-term financial health.

**Gospel Impact:** An assessment of relative evangelistic effectiveness of a church's core ministries by making explicit the mission to promote the Gospel of Jesus Christ and identifying which ministries best reflect this mission.

**Gospel Impact and Stewardship Tool (GIST):** A ministry map providing a visual picture of the integration between **Gospel Impact** and **Financial Viability** of ministry programs in local congregations.

**Gospel Imperative:** The equivalent of *strategic imperatives* (or forced choices) borrowed from secular nonprofit terminology, the *Gospel imperative* concept is the invitation made by the GIST visual map to direct resources toward those ministry activities that best promote the Gospel

of Jesus Christ in the local congregation and surrounding community.

**Intentional Interim Ministry:** A pan-denominational program providing specialized training for pastors to minister to congregations in the unique ministry time between settled pastors. Intentional Interim Ministry pastors are trained in systems theory and other practical tools to engage the congregation in its own learning process to repair from past experiences and to prepare for the future.

**Institutional Church:** Organized religion, including the judicatories and overseers (stewards) of places of worship, in belief and/or practice.

**Knowledge Acquisition:** Learning, developing, and creating skills, insights, and relationships.

**Knowledge Economy:** Knowledge-intensive activities, relying on informational, technological, and intellectual capabilities. In local congregations, the knowledge economy is evidenced in virtual worship services, Bible studies and meetings; mass communication, sound and visual equipment; and staff and volunteer expertise.

**Knowledge Sharing:** Disseminating what has been learned, through person-to-person communication, example, and preaching and teaching.

**Knowledge Storing:** Building a repository of knowledge for current and future access, including repositories in human capital (people's hearts and minds).

**Knowledge Retrieval (Utilizing):** Integrating learning to make it broadly available and generalized to new situations.

**Matrix Map:** A visual tool that plots an organization's activities on "X" and "Y" axes for strategic decision making.

**Ministry Map:** A matrix map adapted for use in local congregations and other faith-based

organizations, customizable for local use through using the Gospel Impact and Stewardship Tool (GIST).

**Mission:** The day-to-day process tasks in ministry which lead to realizing the Vision.

**Shared Costs:** Costs incurred by more than one ministry, such as mortgage, utilities, supplies, and staff support.

**True Cost:** The combination of all the costs related to a particular ministry or program, including (but not limited to) staff time, volunteer time, shared costs, direct costs, and administration costs. *True cost* is the difference between the actual cost of a ministry and the comprehensive cost of that ministry. For purposes of the ministry map true cost is the allocation of actual costs to each ministry where these costs are borne.

**Vision:** The hoped-for future of state. The dream of what it possible, what shall be.

## **ABSTRACT**

Lee, Martin Edward “Gospel Impact and Stewardship Tool: Visual Mapping to Discover Gospel Imperatives for Strategic Ministry Decisions.” Doctor of Ministry. Major Applied Project, Concordia Seminary, 2021. 260 pp.

This research project and the resulting Gospel Impact and Stewardship Tool (“GIST”) addresses congregational stewardship deficits from a systems perspective, with a shared-stewardship imperative for all leaders and members of a congregation, instead of focusing stewardship on the individual. The GIST Ministry Map provides a visual picture of how individual ministries are interconnected. This project illustrates how a learning environment, and the GIST visual ministry mapping process, help improve strategic decision-making so that a congregation may better partner in the mission of God to make disciples and to seek and save the lost. Through a “dual bottom line” (Gospel impact and financial data) the GIST can help align core ministry efforts for the advancement of the Gospel of Jesus Christ.

## CHAPTER ONE

### THE PROJECT INTRODUCTION

The field research for this project is conducted in my current ministry context, an Intentional Interim Ministry assignment to Palisades Lutheran Church (PLC), in Pacific Palisades, California. Despite having adequate resources, existing in a large evangelism pool, and having gifted and active members, PLC membership is declining, and church members and leaders wonder if the church will be around in the next 50 years. The problem this research paper hopes to address for PLC is the stewardship challenge nearly every congregation faces: aligning *collective* ministry efforts and resources toward the advancement of the Gospel of Jesus Christ.

This study will culminate in a **Gospel Impact and Stewardship Tool (GIST)** for congregations to use in assessing core ministries for impact and viability. This research paper and the resulting GIST tool do not focus, as other LCMS stewardship materials do, on the “psychology of the isolated individual.”<sup>1</sup> Instead, this research paper and corresponding GIST tool seek to address congregational stewardship deficits “as a social problem.”<sup>2</sup> Additionally, this project does not offer technical solutions like buildings, building projects, real estate transactions, endowment plans, fundraising campaigns, or legacy funds. This research project contributes to ministry through organizational stewardship learning materials for congregational learning, transformational change, and strategic decision-making for better alignment of the core ministry resources.

This research project is designed to encourage learning in local congregations, and other

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<sup>1</sup> Lewis W. Spitz, *The Reformation: Basic Interpretations Second Edition* (Massachusetts: D.C. Heath And Company, 1972), 64.

<sup>2</sup> Spitz, *The Reformation*, 64.

church organizations, through creating a visual map to help congregations mesh their individual images into a collective whole for strategic decision-making toward improved Gospel impact and financial viability in participation in the economy of God. Chris Argyis and Donald A. Schön claim that “failure of an organization to learn is related to the degree views differ among individual members of the organization.”<sup>3</sup> The GIST tool and GIST Ministry Map can help PLC’s leaders align their ministry resources, despite their dual denominational affiliation, differing theological viewpoints, multiple mission and Vision statements, and eight core ministries, toward better participation in God’s mission for PLC. PLC can learn to overcome learning disabilities through better alignment of material and human resources toward God’s *Missio Dei* if it hopes to survive the new, hostile<sup>4</sup> social and economic terrain. This tool can be used in any sized ministry.

The results of the GIST tool at PLC can provide a test sample of the tool’s usefulness for other LCMS churches, schools, and other ministries. The GIST tool was useful in providing a method of analyzing the congregation’s current state ministry and stewardship effectiveness with their future state goals for vitality and needs for sustainability. The GIST tool was further useful as a teaching tool about congregational stewardship knowledge and practice, including stewardship of God’s mission with the long view in mind.

## **RESEARCH PROBLEM**

Many Lutheran Church—Missouri Synod (LCMS) churches and schools are not satisfied

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<sup>3</sup> Chris Argyris and Donald A. Schön, *Organizational Learning II: Theory, Method, and Practice* (Reading, MA: Addison-Wesley, 1978), 9.

<sup>4</sup> Hostile in reference to the evolving economics of financialization in the church competing for finite resources; the challenges of the rapidly evolving effects of a knowledge economy; and the pressures of societal values competing to replace the God’s values.

with their congregational stewardship; that is, their ability to design ministry models that simultaneously feed the sheep, reach the lost, and leave a blessing for their children and grandchildren. Many LCMS churches and schools feel under-resourced to provide effective ministries (Gospel impact) as well as financially sustainable ministries.

As a credentialed Intentional Interim Ministry (IIM) pastor with a specialty in finance,<sup>5</sup> all eight ministry assignments in the past twelve years have been to churches and schools where the mission has become unclear, personnel have not been employed properly, and/or finances have been mismanaged. Congregational stewardship deficits are most readily noticeable when ministries drift from their intended Gospel purpose and/or become financially inviable. Most congregations have no strategy in place to monitor ministry drift and no means by which to implement realignment. Often congregations are led by the intuition or charisma of a gifted church worker or lay leader, and the ministry strategy is not explicit, making it hard for others to participate in the strategic decision-making process. By the time an incongruity is recognized, the ministry may have suffered an early death or drained the congregation of finite financial and human resources. Congregational stewardship deficits can promote fragmentation, fuel a division, facilitate vision drift, encourage power shifts, foster mismanagement of human and physical resources, and even precipitate church and school closures.

Congregational challenges do not repair themselves without significant effort. Amy Edmondson notes, “The chances of individual components, developed separately, coming together into meaningful, functional wholes without intense communication across the

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<sup>5</sup> Martin E. Lee is an ordained LCMS pastor. He is a registered investment advisor and securities principal. He was called into bi-vocational ministry at the age of 27 having accepted his first Divine Call out of the seminary to a small parish in Southern California requesting a candidate to serve as a worker-priest. He completed his financial training at UBS PaineWebber in Riverside, CA and holds the Series 24, Series 7, Series 65, and Series 63 licenses. Over the past 24 years in ministry, he has pastored eleven churches in five districts (two as a settled pastor, one as a vacancy pastor, and eight as an Intentional Interim pastor).



boundaries are exceedingly low.”<sup>6</sup> The challenge of stewarding ministry impact and viability touches every church and school ministry in the LCMS. A February 28, 2017, *Reporter* article states, “In 1971, the LCMS had a membership of 2,772,648. By 2010, that number was about 2,270,921, a drop of about 500,000 people. Since the peak in the late 1950s, child baptisms are down 70 percent and adult converts are down 47 percent.”<sup>7</sup> Congregations are pressured to do as much with their ministry programs as in the past (or possibly more due to rising costs, inflation, etc.), with fewer people and fewer financial resources. Fostering vital and viable LCMS congregations may be possible through improved congregational stewardship knowledge and practice and better alignment of resources toward ministry goals.

Palisades Lutheran Church (PLC) is typical of local LCMS congregations in that it struggles with declining membership, declining offerings, and an uncertain future. PLC is atypical of LCMS congregations in that the church houses two denominational affiliations (LCMS/LCMC) with often opposing positions on doctrine and practice, and is located in a very affluent and highly educated community within the city of Los Angeles. Without aligning resources around a common vision or Gospel purpose, many ministries have been birthed (some at cross purposes) and resources are stretched. PLC requested an Intentional Interim Pastor to assist in a process of direction-finding between settled pastors. PLC provides an ideal setting to study the effects of misalignment between core ministries, Gospel purpose, and finite resources. The congregation further provides an ideal setting to test the usefulness of an organizational stewardship tool to help in decision-making toward greater alignment of those resources with its

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<sup>6</sup> Amy C. Edmondson, *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy* (San Francisco: Jossey-Bass, 2012), 197.

<sup>7</sup> Joe Isenhower Jr., “Reversing the LCMS Membership Decline: Not Just by Having More Children,” *Reporter*, (February 28, 2017): <https://blogs.lcms.org/2017/reversing-lcms-membership-decline>.

ministries and Gospel purpose for the community of Pacific Palisades.

### **RESEARCH QUESTION**

How useful is a matrix map, as an organizational stewardship tool, to congregations like Palisades Lutheran Church in aligning ministry efforts to improve Gospel impact and financial health for present vitality and future sustainability?

### **RESEARCH PURPOSE**

This research project aims to identify perceived deficits in two stewardship categories: Gospel impact and financial viability. It provides a method of analyzing a congregation's current state ministry and stewardship effectiveness with their future state goals for vitality or needs for sustainability. I hope the Gospel Impact and Stewardship Tool (GIST) developed through this study will be suitable for wide LCMS congregational (and other LCMS organization) applicability.

All core ministries have different levels of impact. Congregations cannot do everything with finite resources. This means they have to choose. These can be difficult decisions when you are choosing between "good" and "great" ministries. My research project endeavors to assist congregations make the hard strategic ministry decisions to best align ministry resources for Gospel impact and financial viability.

Many congregations over-focus on consensus-building or funding to assess whether a particular ministry is viable. The authors of *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* recommend "a nonprofit's strategy for sustainability" includes both "programmatic elements" and "financial elements."<sup>8</sup> Where businesses typically refer to the

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<sup>8</sup> Jeanne Bell, Jan Masaoka, and Steve Zimmerman. *Nonprofit Sustainability: Making Strategic Decisions for*

bottom line, these authors advise nonprofits refer to a “dual bottom line – impact and financial return.”<sup>9</sup> They assert it “is a concept involving both financial health and programmatic impact, and that leaders are constantly attending to both.”<sup>10</sup>

Using the dual bottom line and visual mapping concepts from Bell et. al., I have developed an organizational stewardship resource tool for congregations called the “Gospel Impact and Stewardship Tool” (GIST). It is a process of assessing ministries to plot on a matrix map to provide a visual picture showing the integration between Gospel impact and financial viability of ministry programs in local congregations. Non-profits do not speak of profitability. Instead, they focus on mission impact in the world, or “making a difference.” The GIST tool helps monitor both Gospel impact and financial viability, a dual bottom line. In a single visual map, PLC can see their core ministries based on their congregation’s perceived Gospel impact and relative financial data. Having a visual map will assist PLC in making strategic ministry decisions.

I expect the beneficial results of this project to be to: (1) provide a pathway for congregations like PLC to speak intelligently and honestly about stewardship challenges; (2) prompt discussions on how to effectively address the congregational stewardship problems in a comprehensive and integrated manner; (3) motivate church leaders and ministry teams to partner and collaborate on congregational stewardship decisions; (4) identify strategic imperatives; that is, which ministries to grow (“The Star”), contain costs (“The Heart”), increase impact (“The Money Tree”), and close or give away (“The Stop Sign”); (5) clarify mission and vision; (6) align resources according to God’s mission and the ministry vision; and (7) encourage church and ministry team partnerships to adopt, as routine practice, the use of the Gospel Impact and

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*Financial Viability* (San Francisco: Jossey-Bass, 2010), 16.

<sup>9</sup> Bell, Masaoka, and Zimmerman, *Nonprofit Sustainability*, 16.

<sup>10</sup> Bell, Masaoka, and Zimmerman, *Nonprofit Sustainability*, 16.

Stewardship Tool (GIST) in monitoring and reporting mission progress. In summary, the ultimate desired outcome will be improved participation for PLC in God's mission to feed the sheep and reach the lost without borrowing against future generations.

## CHAPTER TWO

### THE PROJECT IN THE CONTEXT OF RECENT RESEARCH

Recent research that informs this project comes from the fields of finance, business and economics, and the applied sciences. Research in the business and economics fields that inform this project are about best practices for human and material resources in God’s economy. Research by financial professionals who inform this project are experts in providing advice to non-profit organizations in the areas of sustainability and financial viability; and the primary resource for the development of the stewardship assessment (GIST) tool is *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*, authored by Jeanne Bell, Jan Masaoka, and Steve Zimmerman.<sup>1</sup>

The applied science theorists who inform this project are experts in organizational stewardship, organizational learning, and systems theory. Their research describes the “machine model thinking” of yester-year, wherein one “broken” component of an organizational system was thought to be interchangeable with another. Systems and organizational theorists of today advise that all component parts are dependent on, and influenced by, one another – much like the members of one body (1 Cor. 12:12).

Intentional Interim Ministry (IIM) uses systems theory concepts derived from the work of psychologists like Rev. Dr. Peter Steinke, to view “all behaviors within that system” as “mutually influenced and co-causal. The only persons who can make fundamental change in a system are the people involved in the emotional process themselves.”<sup>2</sup> The IIM pastor is an

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<sup>1</sup> Jeanne Bell, Jan Masaoka, and Steve Zimmerman, *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* (San Francisco: Jossey-Bass, 2010).

<sup>2</sup> Alexander, Peter., See Pacific Southwest District of the LCMS IIM Agreement.

experienced pastor, trained in “adaptive leadership skills, tools, and techniques” to encourage healthful change “from a focus on weakness to that of strength, from symptom to system change, from anxiety to clarity, from being ‘stuck’ to new adaptations as they prepare for the future God calls them into and for working as a team with their next settled pastor.”<sup>3</sup> Ultimately, however, “the change that needs to happen comes by God’s grace to the Congregation from the inside out – not from the outside in.”<sup>4</sup>

The Intentional Interim Ministry (IIM) process is that intentional effort to create a learning environment and, in many cases, “learning to learn” again.<sup>5</sup> The IIM process sets the conditions for the collective congregation to be engaged in organizational learning and to promote the sharing of knowledge embedded in pockets of the congregation or in record books. The IIM process assists individuals in synthesizing their views and understanding events that have occurred in their history.

As Argyris and Schön note about organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interaction.”<sup>6</sup> The Gospel Impact and Stewardship Tool (GIST) is customized from the non-profit Matrix Map proffered in *Nonprofit Sustainability* to plot individuals’ images of their activity into a collective visual map.<sup>7</sup> The GIST Ministry Map integrates the images into a collective image to help congregations make those complex decisions necessary to better steward

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<sup>3</sup> Alexander, Peter., See Pacific Southwest District of the LCMS IIM Agreement.

<sup>4</sup> Alexander, Peter., See Pacific Southwest District of the LCMS IIM Agreement.

<sup>5</sup> David Schwandt and Michael Marquardt note, “This concept, learning to learn, encourages the individual to test their theories in use (“The theory constructed to account for a person’s actions by attributing to him a complex intention consisting of governing variables or values, strategies for action, and assumptions that link the strategies to the governing variables”). David R. Schwandt and Michael J. Marquardt, *Organizational Learning: From World-Class Theories to Global Best Practices* (Boca Raton, FL: St. Lucie Press, 2000), 141.

<sup>6</sup> Argyris and Schön, *Organizational Learning II*, 15.

<sup>7</sup> The Matrix Map is documented throughout Chapters Three and Chapters Eleven.

ministry efforts in both Gospel impact and financial viability in participation in the economy of God.

“Learning is the new form of labor,”<sup>8</sup> David R. Schwandt and Michael J. Marquardt say, and “learning inside the organization must be equal to or greater than change outside the organization or the organization will not survive.”<sup>9</sup> Argyris and Schön claim, “There is virtual consensus that we are all subject to a ‘learning imperative,’” and “whole industries can disappear or suffer decline because they fail to detect and respond to early warning signals that call for rapid change.”<sup>10</sup> When a major event occurs in the life of the church, like the death or departure of a beloved pastor (or the closure of a church, school, or ministry program), an opportunity for learning also occurs. The system is unfrozen, willing to unlearn and learn, seeking guidance, and even being willing to innovate due to their desire to perpetuate their mission and accomplish their goals.<sup>11</sup>

Many congregations and ministry leaders struggle with the idea of measuring performance (outcome) of their ministries. It is not clear whether to measure performance nor what benchmarks to use. Will consideration be placed on average weekly attendance, membership rosters, Bible study attendance, the number of ministries birthed, the number of vacant positions on boards and committees, the income statement or balance sheet, how members are feeling, how long the pastor has stayed, the last building project, social media presence, or the congregation’s reputation in the community? As the authors of *Nonprofit Sustainability* advise, leaders of nonprofit organizations should continually attend to both programmatic and financial

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<sup>8</sup> Schwandt and Marquardt, *Organizational Learning*, 1.

<sup>9</sup> Schwandt and Marquardt, *Organizational Learning*, 3.

<sup>10</sup> Argyris and Schön, *Organizational Learning II*, xvii.

<sup>11</sup> Argyris and Schön, *Organizational Learning II*, 15.

elements, a “dual bottom line – impact and financial return.”<sup>12</sup>

A programmatic impact strategy, they explain, “is a plan for the external effects to be sought through a particular business line” (or, for our purposes, ministry line).<sup>13</sup> So, for the authors, “each core activity in the business model is associated with both an impact strategy and a revenue strategy.”<sup>14</sup> “Many nonprofit leaders have an intuitive sense of these business strategies,” the authors observe, but “leaders’ intuition is often not well articulated, and so it is hard for others to participate effectively in shaping the organization’s future.”<sup>15</sup>

“Discussions about mission impact are often difficult” the authors note because, “There’s an implicit assumption that everything is important and that everything drives toward the mission.”<sup>16</sup> While this may be true, the authors note that some programs “have different levels of impact.”<sup>17</sup> Without wanting to criticize worthwhile programs, they observe, “it’s precisely these judgments – about which are the highest-impact programs – that are used”<sup>18</sup> to decide how to steward an organization’s resources for sustainability.

Before panic breaks out over analyzing ministries according to financial return, the authors caution, “There is a natural resistance in nonprofits to describing a program as losing money or being unprofitable. Some people assume that unprofitable programs will be eliminated, but it’s important to quash this superficial view of profitability at the beginning of any discussion related to the financial impact of a program. In fact, the very essence of the nonprofit business model is

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<sup>12</sup> Bell, et al., *Nonprofit Sustainability*, 23.

<sup>13</sup> Bell, et al., *Nonprofit Sustainability*, 23.

<sup>14</sup> Bell, et al., *Nonprofit Sustainability*, 23.

<sup>15</sup> Bell, et al., *Nonprofit Sustainability*, 20.

<sup>16</sup> Bell, et al., *Nonprofit Sustainability*, 39.

<sup>17</sup> Bell, et al., *Nonprofit Sustainability*, 39.

<sup>18</sup> Bell, et al., *Nonprofit Sustainability*, 39.



that some activities will be profitable and that others will lose money.”<sup>19</sup> When evaluating financial return, the authors recommend a goal for nonprofits is to acquire working capital to avoid disruption of their services. They note, “something has to generate [surplus], both to subsidize programs that cannot break even and to build cash reserves and working capital.”<sup>20</sup>

Noting it is the responsibility of leadership to steward a nonprofit organization’s resources for sustainability, the authors encourage the use of the matrix mapping tool to assist in the decision-making process involved in developing and updating strategic plans for both impact and financial return. They maintain, “Leadership is about effective decision making, and the Matrix Map is a powerful tool to support leaders in making sustainability-related decisions.”<sup>21</sup> The strategic planning process may involve choosing between ministries, whether to add new ones or retire ones that have served their purpose. The authors note, “The Matrix Map is a tool for choice making:” first, “To illustrate to board and staff members what the organization is already doing as the first stage in planning;” second, “To inform and focus data gathering;” third, “To prioritize among many worthy goals,” fourth, “To ensure that financial concerns are integrated into the strategic plan,” and fifth, “As a reality check.”<sup>22</sup>

Every congregation (and LCMS organization) has a strategic ministry model that can be visually mapped. Each has a set of core activities it executes, and strategies for obtaining the necessary funds. Often, such activities and funding strategies are not well articulated. The first step in making the ministry model explicit is identifying the church's core ministries and

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<sup>19</sup> Bell, et al., *Nonprofit Sustainability*, 28.

<sup>20</sup> Bell, et al., *Nonprofit Sustainability*, 28.

<sup>21</sup> Bell, et al., *Nonprofit Sustainability*, 173.

<sup>22</sup> Bell, et al., *Nonprofit Sustainability*, 162.

mapping their relative impact<sup>23</sup> on promoting the Gospel of Jesus Christ. GIST is developed to help leaders visually see each of their ministries individually and together as a whole. GIST will also allow leaders and members to make better ministry decisions according to viewing ministry through congregational stewardship criteria, such as alignment with core mission, excellence in execution, leverage, and community building.

### Alignment with Core Mission

Over time, ministries may drift in core mission alignment. Hence, at any given time, some ministries are more aligned than others in Gospel impact. Most (or all) current ministries have some level of impact on individual participants, but there is room for discussion about whether these ministries are ever increasing (Eph. 4:12–13) in alignment with the congregation’s core mission to promote the Gospel of Jesus Christ.

Peter M. Senge tells Bill Russell’s story of how a team of specialists aligned the Boston Celtics basketball team’s collective skills to perform at the highest levels, winning eleven national championships in thirteen years. Senge describes “Russell’s Celtics demonstrate a phenomenon we have come to call ‘*alignment*,’ when a group of people function as a whole.”<sup>24</sup> He notes, “In most teams, the energies of individual members work at cross purposes.”<sup>25</sup> He notes, “Individuals may work extraordinarily hard, but their efforts do not efficiently translate to team effort.”<sup>26</sup>

In ministry, the pastor, principal, and lay-leaders may all be quite gifted, but may work

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<sup>23</sup> As perceived by congregational members and leaders.

<sup>24</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization* (New York: Currency Doubleday, 1990), 234.

<sup>25</sup> Senge, *The Fifth Discipline*, 234.

<sup>26</sup> Senge, *The Fifth Discipline*, 234.

out of alignment with one another. Through alignment, a team becomes focused, “individuals’ energies harmonize,” and “there is less wasted energy.”<sup>27</sup> These result from a “commonality of purpose, a shared vision, and understanding of how to complement one another’s efforts.”<sup>28</sup> In a congregation, and Church body, the many members have complementary roles as part of the one body of Christ and a commonality of purpose toward the shared *Missio Dei*.<sup>29</sup>

### Excellence in Execution

Often ministry programs will give more explicit attention to planning than to execution. The criterion of excellence is a way of getting at execution. Is this ministry program something that the church-school offers in an outstanding, superior way? Do we execute this ministry program competently, or do we execute it amazingly well? The following are sources of information related to the criterion of excellence: Program evaluation data; Feedback from customers, patrons, and clients; and Direct observation; Staff performance evaluations; and Staff turnover and exit interviews. Excellence in execution is a desirable trait in ministry, as King Solomon advises, “Whatever your hand finds to do, do it with all your might, for in the realm of the dead, where you are going, there is neither working nor planning nor knowledge nor wisdom” (Ecclesiastes 9:10).

### Leverage

Ministry programs, of course, do not exist in isolation. One element of impact is leverage, the degree to which a ministry program increases the impact of other ministry programs. A ministry may score high on the criterion of leverage because it creates opportunity for

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<sup>27</sup> Senge, *The Fifth Discipline*, 234.

<sup>28</sup> Senge, *The Fifth Discipline*, 234.

<sup>29</sup> 1 Cor. 12:12.

evangelism, member and visitor assimilation, youth engagement, volunteer participation, worship attendance or increased offerings.

Senge argues for “leverage” as a strategic use of resources. He asserts, “The bottom line of systems thinking is leverage – seeing where actions and changes in structures can lead to significant, enduring improvements.”<sup>30</sup> The leverage occurs when ‘significant’ and ‘enduring improvements’ are achieved. Senge further maintains, “the best results come not from large-scale efforts but from small well-focused actions.”<sup>31</sup> Too much effort is given to those matters which are of little significance in the grand scheme of things and consequently “we create our own market limits.”<sup>32</sup> The organization’s inclination is to focus on “low-leverage changes...on symptoms where the stress is greatest.”<sup>33</sup> “As a systems thinker,” Senge advises, “you would first identify that key problem symptom, and then the symptomatic and fundamental responses to it.”<sup>34</sup>

### Community Building: Teaming

One measure of impact may be related to building the capacity and strength of the community – care ministries, spiritual growth, and mission field – rather than to building the organization itself. Does the ministry program help build the community around the church? The following sources may provide information related to the criterion of community building:

Interviews with community and ministry leaders; reviews of member support; and recent survey.

Kathryn S. Roloff, Anita W. Woolley, and Amy C. Edmondson recognize a key problem

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<sup>30</sup> Senge, *The Fifth Discipline*, 114.

<sup>31</sup> Senge, *The Fifth Discipline*, 114.

<sup>32</sup> Senge, *The Fifth Discipline*, 115.

<sup>33</sup> Senge, *The Fifth Discipline*, 115.

<sup>34</sup> Senge, *The Fifth Discipline*, 120.

organizational theorists are trying to address is how best to design the organization “to manage time, attention, and flow of information among individuals and organizational units.”<sup>35</sup>

Organizations are continuously challenged to be more productive, more innovative, and quicker at lower costs. The authors observe, “To accommodate the demands for higher productivity and faster learning, organizations have increasingly turned to using smaller and more flexible work units, such as teams, to accomplish their most important tasks.”<sup>36</sup>

Recommended workplace structures have evolved from “hierarchical structures, to team-based work in matrix structures, and ultimately to team-based work in multi-team systems.”<sup>37</sup> Universal grace implies the need for transcendence across cultural, ethnic, or ministry team boundaries. God brings the Israelites into conversation with other “teams” (i.e., Gentiles, Samaritans, Pentecost, etc.) when He drives His people into foreign lands (e.g., Abraham, Joseph, the Israelites, Ruth, Esther, Jonah, the Israelite’s captivity, etc.). The Apostle Paul is a good example of someone who adopted a multiple team model. He joined the leadership teams in the churches of Galatia, Ephesus, Rome, Colossi, Philippi, Thessalonica, and Corinth. Intentional Interim Pastors (IIP’s) have opportunity to hold multiple team membership with many churches and increase personal learning while transporting knowledge from other teams across organizational boundaries (cross-pollination). The very nature of the Gospel necessitates a multiple team membership model approach.

Roloff, et al., note, “Multiple team membership seems especially common in many industries and settings in which learning, and productivity are both especially critical, including

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<sup>35</sup> Kathryn S. Roloff, Anita W. Woolley, and Amy C. Edmondson, "The Contribution of Teams to Organizational Learning," in *Handbook of Organizational Learning & Knowledge Management*, edited by Mark Easterby-Smith and Marjorie A. Lyles, 249 –71. (Chichester, West Sussex: John Wiley & Sons, 2011), 249.

<sup>36</sup> Roloff et al., "Contribution," 250.

<sup>37</sup> Roloff et al., "Contribution," 250.

information technology.”<sup>38</sup> They discovered that, “As more teams share members, there is increased resource interdependence among different units of the organization.”<sup>39</sup> The advantage of such team plays and collaboration is the creation of “more paths” for information to flow and come together, avoiding information getting stuck in the organizational system. Team play almost forces the various parts of the whole into an inter-dependence, or reliance, on one another, thus promoting knowledge throughout the whole. Roloff, et al., agree, saying, “Through multiple team membership, team learning can cross-fertilize across teams, building organizational learning.”<sup>40</sup> Knowledge of God has been utilized, shared, and stored through intergenerational family groups and across cultures in largely the same manner.

## ORIGINALITY

This project will expand on current LCMS stewardship materials by providing new insight and application in the study and practice of congregational stewardship. Current LCMS stewardship resources are geared toward how the pastor and individual members behave and how the various agencies (RSO’s) may be of use for individual stewardship.<sup>41</sup> Identifying individual persons and entities for stewardship activity and holding those individual persons or entities responsible for the success of the whole, reflects old-school machine model thinking. This research project instead considers the responsibilities of the various congregational stewards in relationship to one another within the system.

The stewardship assessment (GIST) tool, from the perspective of congregational

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<sup>38</sup> Roloff, et al., “Contribution,” 250.

<sup>39</sup> Roloff, et al., “Contribution,” 250.

<sup>40</sup> Roloff, et al., “Contribution,” 249.

<sup>41</sup> Department of Stewardship Ministry, “Pastor: Getting Personal” In *LCMS Congregational Stewardship Workbook 2000* (The Lutheran Church—Missouri Synod, Department of Stewardship Ministry, 2000), 1–24.

stewardship and directed toward enhancing the impact and viability of local ministries, is an original resource applied to the context of Palisades Lutheran Church with the potential of beneficial use in other congregations. It integrates organizational learning principals and a dual bottom line for Gospel impact and financial viability. This research project takes the perspective that a systems approach to stewardship is more aligned with Luther's thinking on how God works through money (and other means) to provide after the Fall.

Since studying stewardship in the LCMS has been focused on the individual persons or entities, a vast area of inquiry is open to those who would be interested in studying stewardship from a social, organizational, or historical context, i.e., congregational stewardship. Example presenting opportunities for research are: how much financialization effects churches, whether churches are impacted in the same way individuals are, and whether a historically middle-to-upper-middle class LCMS is still predominantly middle class.

## **LITERATURE REVIEW**

The literature that informs this project is drawn from four disciplines: theology, history, economics, and applied sciences. The theological resources that inform this research project pertain to God's stewarding His mission through means (such as people and property). The historical resources that inform this research project show the evolution of church finance. The business and economics resources that inform this project are about the influence of financial institutions on congregational systems and about best practices for human and material resources in God's economy; and the applied science theorists who inform this project are experts in organizational stewardship, organizational learning, and systems theory.

Mark Easterby-Smith and Marjorie A. Lyles detail the history of the related fields of

organizational learning and knowledge management. They observe, “The idea that an organization could learn, and knowledge could be stored over time was [a] breakthrough, which was first articulated in the book by Cyert and March (1963).”<sup>42</sup> In their work, Cyert and March assert: “An organization ... changes its behavior in response to short-run feedback from the environment according to some fairly well-defined rules. It changes rules in response to longer-run feedback according to some more general rules, and so on.”<sup>43</sup> Argyris and Schön criticized Cyert and March, “pointing out that human behavior with organizations frequently does not follow the lines of economic rationality.”<sup>44</sup> Rather, Argyris and Schön maintained that organizations and individuals will “seek to protect themselves from the unpleasant experience of learning by establishing defensive routines.”<sup>45</sup>

Argyris and Schön tackle the basic question: “What is an organization that it may be said to learn?”<sup>46</sup> They answer this question by treating an organization as a personal, rather than impersonal, entity.<sup>47</sup> But the personal organization is made up of individuals.<sup>48</sup> Just because individuals might learn something does not mean the organization has learned something: “In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do.”<sup>49</sup> In contrast,

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<sup>42</sup> Mark Easterby-Smith and Marjorie A. Lyles, “The Evolving Field of Organizational Learning and Knowledge Management.” In *Handbook of Organizational Learning & Knowledge Management*, edited by Mark Easterby-Smith and Marjorie A. Lyles, 11–20. (Chichester, West Sussex: John Wiley & Sons, 2011), 11.

<sup>43</sup> Easterby-Smith, et al., “The Evolving Field,” 11.

<sup>44</sup> Easterby-Smith, et al., “The Evolving Field,” 11.

<sup>45</sup> Easterby-Smith, et al., “The Evolving Field,” 11.

<sup>46</sup> Argyris and Schön, *Organizational Learning II*, 6.

<sup>47</sup> Argyris and Schön, *Organizational Learning II*, 5.

<sup>48</sup> Jesus calls the collective church His body, His bride, and the mother of all believers. (Jer. 3:8; Eph. 5:25–27; 2 Cor. 11:2; Rev. 19:7–9)

<sup>49</sup> Argyris and Schön, *Organizational Learning II*, 5.



as in the case of the social media companies, Google, Amazon, the military and the phone company, “there are situations in which an organization seems to know far more than its individual members” due to “structures, procedures, and memories built into the fabric of organizations...”.<sup>50</sup> Argyris and Schön assert that “when something that looks like organizational learning occurs, it seems, not infrequently, to have little to do with the person at the top.”<sup>51</sup> Instead, “we might think of clusters of individual members as the agents who learn ‘for’ the larger organization to which they belong.”<sup>52</sup>

Easterby-Smith and Lyles further describe “Dewey’s view that learning takes place through social interaction and yet cannot be passed from person to person as if it were a physical object.”<sup>53</sup> Organizational learning occurs when there is a casual and persistent exchange of ideas. Church and school ministry teams can cultivate learning simply through increased dialogue. Encouraging ministry leaders to meet regularly and to attend Bible study provides opportunity for ministry teams to dialogue and encourage one another in their faith and knowledge of God’s Word. Senge notes the observations of the famous Physicist Werner Heisenberg. “Heisenberg then recalls a lifetime of conversations with Pauli, Einstein, Bohr, and the other great figures who uprooted and reshaped traditional physics in the first half of the century,” he writes. “These conversations, which Heisenberg says, ‘had a lasting effect on my thinking,’ literally gave birth to many of the theories for which these men eventually became famous.”<sup>54</sup>

Senge marvels at “the staggering potential of collaborative learning – that collectively, we

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<sup>50</sup> Argyris and Schön, *Organizational Learning II*, 7.

<sup>51</sup> Argyris and Schön, *Organizational Learning II*, 7.

<sup>52</sup> Argyris and Schön, *Organizational Learning II*, 7.

<sup>53</sup> Argyris and Schön, *Organizational Learning II*, 9.

<sup>54</sup> Senge, *The Fifth Discipline*, 238 –39.

can be more insightful, more intelligent than we can possibly be individually.” David Bohm, holds, “dialogue becomes open to the flow of a larger intelligence.”<sup>55</sup> Senge suggests, “Dialogue, it turns out, is a very old idea revered by the ancient Greeks”<sup>56</sup> and the church may think of Job and his three friends. Some may view the dialogue between Job and his three friends as an example of the group’s ignorance and not their collective wisdom.<sup>57</sup> But “the purpose of dialogue,” Bohm explains, “is to reveal the incoherence in our thought.”<sup>58</sup> Senge asserts, “In dialogue people become observers of their own thinking.”<sup>59</sup> Bohm says that “Most thought is collective in origin. Each individual does something with it,” but it originates collectively by and large. “Language, for example, is entirely collective,” says Bohm.<sup>60</sup> “Bohm identifies three basic conditions that are necessary for dialogue: 1. All participants must ‘suspend’ their assumptions, literally to hold them ‘as if suspended before us’; 2. All participants must regard one another as colleagues; 3. There must be a ‘facilitator’ who ‘holds the context’ of dialogue.”<sup>61</sup>

Argyris and Schön describe that in organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interaction”<sup>62</sup> and that failure of an organization to learn is related to the degree views differ among individual members of the organization.<sup>63</sup> They warn that as long as “stories remained

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<sup>55</sup> Senge, *The Fifth Discipline*, 239.

<sup>56</sup> Senge, *The Fifth Discipline*, 239.

<sup>57</sup> The book of Job provides detail of the dialogue, which (remarkably) includes God and readers in this timeless conversation.

<sup>58</sup> Senge, *The Fifth Discipline*, 240.

<sup>59</sup> Senge, *The Fifth Discipline*, 240.

<sup>60</sup> Senge, *The Fifth Discipline*, 240.

<sup>61</sup> Senge, *The Fifth Discipline*, 243.

<sup>62</sup> Argyris and Schön, *Organizational Learning II*, 15.

<sup>63</sup> Argyris and Schön, *Organizational Learning II*, 11.

scattered and uninterpreted, the map of the development process remained vague, and the diagnoses of the development problem remained ambiguous.”<sup>64</sup>

Argyris and Schön distinguish between a “mob” and an organization using three conditions: organizations devise agreed-upon procedures for making decisions in the name of the collectivity, delegate to individuals the authority to act for the collectivity, and set boundaries between the collectivity and the rest of the world.<sup>65</sup> Argyris and Schön assert, “By establishing rule-governed ways of deciding, delegating, and setting boundaries of membership, a collectivity becomes an organization capable of acting.”<sup>66</sup> These basic conditions are the building blocks for organizational learning. The goal is to have the knowledge held explicitly and not with individuals, in their minds (tacit), but rather, “knowledge may also be held in an organization’s files, which record its actions, decisions, regulations, and policies as well as in the maps, formal and informal, through which organizations make themselves understandable to themselves and others.”<sup>67</sup> Such knowledge becomes “embedded.”

Organizations also learn through experience. Carol C. Leavitt explains, “[David] Kolb’s experiential learning theory (ELT) is based in psychology, philosophy, and physiology and has significantly influenced leadership and organizational development and has contributed to principles of the learning organization.”<sup>68</sup> Leavitt describes, “Its basic premise is that learning occurs through the combination of grasping and transforming experience. ELT constitutes a four-stage learning cycle: concrete experience (CE) and abstract conceptualization (AC) comprise the

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<sup>64</sup> Argyris and Schön, *Organizational Learning II*, 67.

<sup>65</sup> Argyris and Schön, *Organizational Learning II*, 9.

<sup>66</sup> Argyris and Schön, *Organizational Learning II*, 9.

<sup>67</sup> Argyris and Schön, *Organizational Learning II*, 9.

<sup>68</sup> Carol C. Leavitt, “A comparative Analysis of Three Unique Theories of Organizational Learning,” *Semantic Scholar*, (2011): 1–19, <https://files.eric.ed.gov/fulltext/ED523990.pdf>.

grasping component, while reflective observation (RO), and active experimentation (AE) make up the transforming experience component.”<sup>69</sup> Leavitt concludes, “This learning process is characterized as a cycle in which the learner proceeds through the sequence of experiencing, reflecting, thinking, and acting in a repeating progression that is unique to each learning circumstance. This learning cycle can be entered at any point, but the stages are always followed in sequence.”<sup>70</sup>

Luther writes about learning through experience, or mostly through trial, called *Anfechtungen*.<sup>71</sup> David P. Scaer notes that for Luther: “*Anfechtungen* deal not so much with a doctrine that is revealed and then believed as with the personal attitude of the Christian who reflects upon divine revelation and his own experiences in life and is tempted to resolve the conflict on the basis of his experiences.”<sup>72</sup> The conflict between one’s own experience and the promise must be resolved by faith for the believer. The promise and the experience remain tacit, in the “conversion model,”<sup>73</sup> waiting to become explicit to the believer through the promise realized. The ability to reflect is a measure of one’s ability to learn and acquire new knowledge. Paul illustrates the *knowledge wheel and learning process* in action when he reflects “For I do not understand my own actions. For I do not do what I want, but I do the very thing I hate” (Romans 7:15). Through suffering (*anfechtungen*) and the ability to reflect on this cross he makes explicit his learn. He proceeds to share and document (storing) his learning. Paul’s

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<sup>69</sup> Leavitt, "A Comparative Analysis," 7.

<sup>70</sup> Leavitt, "A Comparative Analysis," 7–8.

<sup>71</sup> David P. Scaer, “*The Concept of Anfechtung in Luther’s Thought*,” *Concordia Theological Quarterly*, Volume 47, Number 1, (January 1983), 27.

<sup>72</sup> Scaer, “*Anfechtung in Luther’s Thought*,” 27.

<sup>73</sup> Haridimos Tsoukas, “How Should We Understand Tacit Knowledge? A Phenomenological View,” in *Handbook of Organizational Learning & Knowledge Management, Second Edition*, (Chichester, West Sussex: John Wiley & Sons, 2011), 455.

learning becomes knowledge made explicit and available to be retrieved by the body of believers for ages to come.

Many organizational theorists would maintain the necessity of converting tacit knowledge to explicit knowledge. The well-known Engineer, Statistician, and Professor, W. Edward Demings, famously said, “If you can’t describe what you are doing as a process, you don’t know what you are doing.”<sup>74</sup> Peter B. Vaill says, “Reflection is the capacity to ‘notice oneself noticing’; that is, to step back and see one’s mind working in relation to its projects.”<sup>75</sup> Interestingly, Haridimos Tsoukas argues against the idea of the need to convert tacit knowledge to explicit knowledge. He argues, “The main [misunderstanding] is that tacit knowledge is still mostly seen on the conversion model: as knowledge awaiting its conversion to explicit knowledge.”<sup>76</sup>

“Tacit knowledge” notes Tsoukas, “underlies all skillful action, an important feature of organizational life.”<sup>77</sup> He notes, “Organizational members know lots of things about what they do although, paradoxically, when they are asked to describe how they do what they do, they often find it hard to express it in words.”<sup>78</sup> Tsoukas argues that is because, “Effective performance depends on knowledge that cannot be explicitly formulated in full.”<sup>79</sup> And we access tacit knowledge not by rote explicit instructions, but through action.

David Kolb’s ELT model influenced scholar Peter Senge, who evolved another cognitive

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<sup>74</sup> “W. Edwards Deming – PDCA – Quality Management,” Strategies for Influence accessed October 30, 2021, <https://strategiesforinfluence.com/w-edwards-deming-pdca-quality-management/>.

<sup>75</sup> Schwandt and Marquardt, *Organizational Learning*, 117.

<sup>76</sup> Tsoukas, “Tacit Knowledge,” 455.

<sup>77</sup> Tsoukas, “Tacit Knowledge,” 457.

<sup>78</sup> Tsoukas, “Tacit Knowledge,” 455.

<sup>79</sup> Tsoukas, “Tacit Knowledge,” 455.

theory of organizational learning that prominently identified mental models – deeply ingrained assumptions, generalizations, or pictures and images that influence how we understand the world and how we act<sup>80</sup> – as a crucial component. Peter Senge identifies another four components required for learning at the individual, team, and organization level are personal mastery, building shared vision, team learning, and systems thinking.<sup>81</sup>

Highlighting two types of learning, Leavitt notes, “One of the important principles of Senge's work is the differentiation between adaptive and generative learning. He characterizes adaptive learning as focusing on the foundation of existing knowledge, and amending that with new thinking, to accomplish an objective. This kind of learning is particularly salient to organizations seeking continuous improvement. For example, understanding the gaps between one's own firm's productivity, quality, costs, or market agility, and that of the competition, enables the generation of additional ideas by which to close those gaps.”<sup>82</sup>

Leavitt observes, generative learning is necessary to explore new thinking, noting in her report,

By contrast, when new strategies, product lines, resources, or other assets are urgently needed, a different kind of learning is required to produce radical innovative ideas and discontinuous change – which is the nature of generative learning (Harrison, 2000). This was validated soon afterward by scholar James March (1991), who expanded on this theory to identify two modes of organizational learning: 1) exploitation, or the use of existing knowledge and resources to gain value from what is already known; and 2) exploration or thinking in previously unused or unforeseen ways (i.e., seeking new options, experimenting, and conducting research) (p. 72).<sup>83</sup>

Leavitt warns, “Too much exploration of new knowledge (generative learning) leaves the

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<sup>80</sup> Leavitt, "A Comparative Analysis," 7 –8.

<sup>81</sup> Senge, *The Fifth Discipline*, 6 –11.

<sup>82</sup> Leavitt, "A Comparative Analysis," 8.

<sup>83</sup> Leavitt, "A Comparative Analysis," 8.

organization wishing for returns on its investments, while too much exploitation of existing knowledge (adaptive learning) may result in it becoming outdated and useless. The challenge here is to create the appropriate balance – even though it may be a moving target – between the need to develop new knowledge versus leverage existing knowledge.”<sup>84</sup>

Leavitt observes, “Different from the cognitive theories, behavioral approaches to organizational learning emphasize the action-based changes that take place as individuals learn through performance. These approaches characterize learning as observable, rational, and quantifiable.

Scholars Nevis, DiBella, & Goulds’ (1995) theory presents a learning process featuring three unique stages: (1) knowledge acquisition, consisting of the development or creation of skills, insights, and relationships; (2) knowledge sharing, characterized by the dissemination of what has been learned; and (3) knowledge utilization, comprised of the integration of learning to make it broadly available and generalized to new situations (p. 74). All three of these stages are strongly behavior-linked and focused on practical application more than cognition.”<sup>85</sup>

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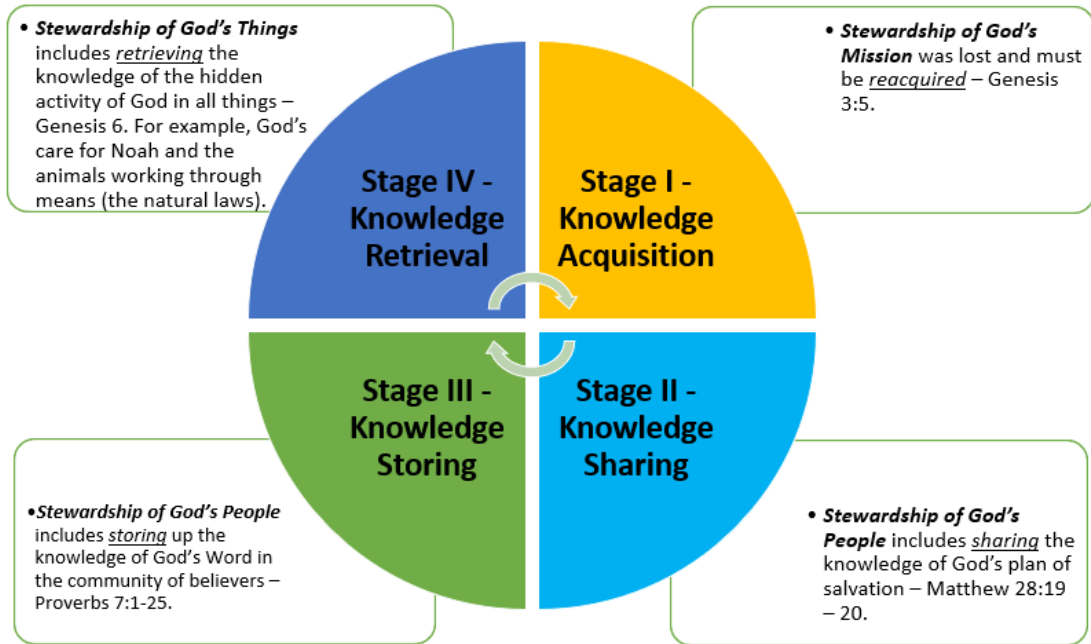
<sup>84</sup> Leavitt, "A Comparative Analysis," 10–11.

<sup>85</sup> Leavitt, "A Comparative Analysis," 8.

## CHAPTER THREE

### THE PROJECT IN THEOLOGICAL PERSPECTIVE

# Spiritual Disciplines and The Knowledge Wheel & Learning Process



The doctrine of stewardship is especially important to this research project. This chapter explores the idea that the doctrine of stewardship is best understood as the proper use of knowledge. Traditionally congregational stewardship focuses on three areas: time, talent, and treasures. This chapter considers the value of using the *knowledge wheel and learning process* (in the above figure) to help illustrate how the Gospel has historically been acquired and passed on since the Fall. Each stage of the *knowledge wheel and learning process* is associated with a spiritual discipline of stewardship. The four stages of the knowledge wheel and learning process reflect God's redemptive narrative: **Stage I – Knowledge Acquisition**, Adam lost perfect knowledge and now divine knowledge must be restored; **Stage II – Knowledge Sharing**, Gospel



must be taught and shared among the nations; **Stage III – Knowledge Storing**, the knowledge of the Gospel of Jesus Christ must be well documented and accessible by all; and, **Stage IV – Knowledge Retrieval**, God is hiding everywhere in creation, performing mighty deeds, and ready to be honored and obeyed, including behind money.<sup>1</sup>

God deals with us in the world in ways that applied scientists are now discovering work for us to deal with each other as well. The Church remains “in” the world but not “of” the world. While the Church remains in the world, “in the body,” it functions under the same physical laws common to man; and, therefore, must shrewdly steward<sup>2</sup> the means by which God accomplishes His mission. This view is a traditionally Lutheran view, as Luther continually taught that Christians should not leave the world but remain active participants in it. Just as Jesus placed himself under the law “to redeem those under the law,”<sup>3</sup> so we should imitate Jesus’ humility by engaging the world and the people who live in it “under the law.”<sup>4</sup>

Church organizations may have a learning advantage over other nonprofit organizations, since Biblical narratives help to create a “concerted meshing of individuals’ images of their activity in the context of their collective interaction.”<sup>5</sup> Furthermore, God’s people are led by the Holy Spirit to *metanoia*, or a change of mind.<sup>6</sup> Finally, as Luther understood, once we learn a truth in God’s Word, our faith becomes stronger through action-based trial, experience, or *Anfektungen*. The GIST tool employs processes that human experts have learned work in God’s

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<sup>1</sup> For further reading on knowledge coordination in promotion of the Gospel the reader may want to consult *Confessing the Gospel: A Lutheran Approach to Systematic Theology* sections on Creation, (St. Louis, MO: Concordia, 2017), see pages 125 – 217 (Creation) and 219 – 342 (Anthropology).

<sup>2</sup> Luke 16:1–13.

<sup>3</sup> Galatians 4:4–5.

<sup>4</sup> Philippians 2:5–8.

<sup>5</sup> Argyris and Schön, *Organizational Learning II*, 15.

<sup>6</sup> Senge, *The Fifth Discipline*, 13.

creation and through which a congregation may learn about themselves, their core ministries, and their resources. Finally, the GIST Gospel Imperatives Decision Table helps a congregation actively apply their new learning through improved strategic decision-making and deployment of resources God has blessed the congregation with to His glory and their neighbor's good.

Luther's theology on God's use of means provides a guide for our understanding on the use of money and other material goods. Luther writes in his explanation to the First Commandment in the Large Catechism that one should "use all the blessings that God gives, just as a shoemaker uses his needle, awl, and thread for work and then lays them aside...without allowing any of these things to be our lord or idol."<sup>7</sup> In keeping with Luther's view on "all the blessings God gives," Paul's advice in 1 Corinthians 10:31 to "do all things to the glory of God," and Eph. 1:22 that "God placed all things under his feet and appointed him to be head over everything for the church," this research project presupposes that stewardship practices may make use of "all things" in the mission of God, including secular economic and organizational theories, and all material goods.

God's people have been on the frontier of learning and knowledge since Adam but are continually working and learning to keep up with the persistent slide away from a perfect understanding of how to care for God's world. Hence, pastors of local congregations should be concerned about their congregations learning to learn, primarily about the *Missio Dei*, but also about how to practice congregational stewardship of core ministries.

The themes of learning, and knowledge lost and restored, are prevalent throughout the Bible. Like pastors are under-shepherds of the Good Shepherd, so human stewards are under-

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<sup>7</sup> "Exposition of the Appendix to the 1<sup>st</sup> Commandment," Book of Concord, accessed October 31, 2021, <https://bookofconcord.org/large-catechism/part-i/commandment-i/>.

stewards of the Master Steward (Christ), invited to participate in His redemptive activities. Stewardship of God's Word is learning and sharing all the knowledge of God, written down for our edification.<sup>8</sup> Stewardship of God's people is participation in God's work of storing up the knowledge of God in the hearts and minds of His people. Stewardship of God's things is proper handling of those things God has used to store up His time and talent for our effectual use. Stewardship, then, is God's use of God's resources in God's activity (through us) to seek and to save that which belongs to Him. Congregational stewardship is the faithful, collective activity of church members joining in God's economy, which is His activity in the world. This collective activity is what this research project aims to observe, quantify, and map to help PLC and other congregations better understand their members' and core ministries' movement toward alignment with the congregation's overall mission to seek and save the lost.

### **BIBLICAL AND THEOLOGICAL FOUNDATION**

The primary theological basis for this project is stewardship: stewardship of God's mission, God's people, and God's property. The primary task of the church on earth is stewardship of God's mission, the *Missio Dei*. In *The Mission of God*, Christopher Wright holds that "*our mission (if it is biblically informed and validated) means our committed participation as God's people, at God's invitation and command, in God's own mission within the history of God's world for the redemption of creation.*"<sup>9</sup> God's own mission is expressly stated in Matthew 28:18-20 when Jesus said to His disciples: "All authority has been given to Me in heaven and on earth. Go therefore and make disciples of all nations, baptizing them in the name of the Father and the

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<sup>8</sup> "I write these things to you who believe in the name of the Son of God so that you may know that you have eternal life," John 5:13.

<sup>9</sup> Christopher Wright, *The Mission of God: Unlocking the Bible's Grand Narrative* (Downers Grove, ILL: InterVarsity Press, 2006), 23.

Son and the Holy Spirit, teaching them to observe all that I commanded you; and lo, I am with you always, even to the end of the age.” The local congregation’s stewardship of God’s mission, then, is this committed participation in God’s own mission for the redemption of creation.

Ancillary to the church’s stewardship of God’s mission, is the need for local churches to steward the means through which God accomplishes His mission on earth: God’s people and God’s things. God gives the Church people to help in mission and to disciple, and He gives the Church material instruments to accomplish His mission. The CTCR document titled, “A Theological Statement of Mission,” notes, “There has been a growing recognition that everything the church does to communicate and demonstrate Christ’s love for the world is an expression of God’s sending and seeking love.”<sup>10</sup> Therefore, *all things* are at the disposal of the Church to use in service of the *Missio Dei*.

### **Stewarding God’s Mission: Stage I – Knowledge ‘Acquisition’<sup>11</sup>**

God’s mission recruits all of creation into His redemptive purposes. God’s mission to seek and to save the lost<sup>12</sup> is continually under assault from the devil, the world, and our sinful selves. Our participation in God’s mission is tarnished by our separation from the God of all knowledge. Due to the effects of lost knowledge the Church struggles with knowing how to steward His mission, being tempted to see our own activity as automatically endorsed by God, rather than allowing God’s mission to define ours. Wright observes that the term “mission” has been used primarily to describe “human endeavors”<sup>13</sup> and not God’s activity. He sees that the mission

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<sup>10</sup> The Commission of Theology and Church Relations, *A Theological Statement of Mission*. (St. Louis, MO: Lutheran Church—Missouri Synod, 1991), 5.  
<https://files.lcms.org/file/preview/wsUaJ8JTg9Jab9vXLiN2MuXkaSkkp8Pc?>.

<sup>11</sup> See Appendix 1.

<sup>12</sup> Matt. 18:11; Luke 19:10.

<sup>13</sup> Wright, *Mission of God*, 22.

belongs to God, is defined by God, and is accomplished by God. We participate at God's invitation and command.<sup>14</sup>

The Scriptures are replete with God's commands in which He makes His mission known. Genesis 2:16–17 tells us, “And the Lord God commanded the man, saying, ‘You may surely eat of every tree of the garden, but of the tree of the knowledge of good and evil you shall not eat, for in the day that you eat of it you shall surely die.’” God entrusted His divine and holy “Word” to the man, Adam. If Adam had obeyed God's command there would have been no need for the written Word of God, the spoken Word would have been sufficient. Luther says, “In this passage the church is established, as I said, before there was a home government. Here the Lord is preaching to Adam and setting the Word before him. Although the Word is short, it is nevertheless worth our spending a little time on it. For if Adam had remained in innocence, this preaching would have been like a Bible for him and for all of us; and we would have had no need for paper, ink, pens, and that endless multitude of books which we require today, although we do not attain a thousandth part of that wisdom which Adam had in Paradise.”<sup>15</sup> The timeline is set out clearly in Genesis 2:15–22: God gave Adam the command before He created Eve out of Adam's rib. And “This sermon was delivered on the sixth day; and if, as the text indicates, Adam alone heard it, he later on informed Eve of it.”<sup>16</sup> One might say Adam was the first pastor—and a steward of God's mission, God's people, and God's property.

### Stewardship Knowledge Lost

In the beginning, Adam had perfect knowledge of God's mission: to care for the creation

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<sup>14</sup> Wright, *Mission of God*, 23.

<sup>15</sup> Martin Luther, *Luther's Works: Lectures on Genesis, Chapters 1–5*, Edited by Jaroslav Pelikan and Helmut T. Lehmann (Saint Louis, MO: Concordia, 1958), 105.

<sup>16</sup> Luther, *Luther's Works: Lectures on Genesis*, 105.

God made. God “put him into the garden of Eden to dress it and to keep it” (Gen. 1:26; 2:15). At that point, Adam had perfect knowledge of God and, it seems, he also had the requisite knowledge to be steward of creation. Satan promised Adam and Eve they shall have “knowledge,” promising, “you will be like God, knowing good and evil” (Gen. 3:5). Some theologians hold, “the Fall was a fall up and not down.”<sup>17</sup> But the Lutheran theologian Francis Pieper asserts, “While natural man, after the Fall, still retains a certain amount of intelligence in natural things, he is utterly incapable of understanding spiritual matters, the things that have to do with obtaining of God’s grace and salvation. In his natural condition, man regards the Gospel, his only salvation after the Fall, as foolishness....”<sup>18</sup> Luther says after the Fall, “Adam is totally changed and has become quite another man.”<sup>19</sup> Pieper says, “The intelligence of Adam has suffered an eclipse.”<sup>20</sup>

After the Fall, certain knowledge was gained, and certain knowledge was lost. Now man (“the church”) must relearn how to take care in “committed participation as God’s people, at God’s invitation and command, in God’s own mission within the history of God’s world for the redemption of creation.” By “God’s invitation and command” the Church is the means by which God intends to restore a fallen creation, with limited resources, and to rightly praise the God of all knowledge. In addition, God’s purposes (mission) for creation had to change. As well as “dressing and keeping” creation, now the people of God (“the Church”) are tasked to participate in God’s mission to *save* it.<sup>21</sup> God does not withdraw his command. Instead, Jesus says, “If you

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<sup>17</sup> Francis Pieper, D.D., *Christian Dogmatics* (Saint Louis, MO: Concordia, 1950), 544.

<sup>18</sup> Pieper, *Christian Dogmatics*, 544.

<sup>19</sup> Pieper, *Christian Dogmatics*, 544.

<sup>20</sup> Pieper, *Christian Dogmatics*, 544.

<sup>21</sup> Matt. 28:16–20.

love me, you will obey my commandments,” (John 14:15) and He details what keeping His command will look like after the Fall.<sup>22</sup>

### Stewardship Knowledge Restored

To be proper stewards of God’s Word and world requires a change of heart and mind toward God, or *metanoia*. The Greek term is often described in theological terms as repentance, or a change of mind. Senge links the origin of the word to learning. He observes, “To grasp the meaning of ‘metanoia’ is to grasp the deeper meaning of ‘learning,’ for learning also involves a fundamental shift or movement of mind.”<sup>23</sup> He explains, “Through learning we re-perceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the generative process of life.”<sup>24</sup> He concludes, “This, then, is the basic meaning of a ‘learning organization’—an organization that is continually expanding its capacity to create its future.”<sup>25</sup>

Local churches are to be learning organizations, continually learning about God, His Word, and His will for our lives. As steward of God’s mission, the Church must relearn what God’s good purposes are for us in the world as well as in our local communities. In Jesus Christ, we are called to be life-long learners. Schwandt and Marquardt acknowledge the peculiar role humans have in relation to other creatures to learn. They assert, “Our associated responsibility as human beings [is] to continuously contribute to knowledge creation through this learning process.”<sup>26</sup> Schwandt and Marquardt describe this role as being ‘peculiar,’ almost acknowledging an extraordinary treatment of humans in relation to the rest of creation.

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<sup>22</sup> Matt. 5:48.

<sup>23</sup> Senge, *The Fifth Discipline*, 13.

<sup>24</sup> Senge, *The Fifth Discipline*, 14.

<sup>25</sup> Senge, *The Fifth Discipline*, 14.

<sup>26</sup> Schwandt and Marquardt, *Organizational Learning*, 117.

Jesus, we learn, is the Good Teacher. Solomon tells us, “The fear of the Lord is the beginning of wisdom and knowledge of the Holy One is understanding” (Prov. 9:10). “The fear of the Lord” certainly aids us in our stewardship of God’s mission and (to a lesser extent) in our stewardship of God’s creation also. King Solomon writes in Proverbs 1, “Let the wise listen and add to their learning and let the discerning get guidance” (Prov. 1:5, NIV).

Learning starts with listening to God’s Word and commands. Jesus says, “My sheep listen to my voice” (John 10:27) and “Whoever is of God hears the words of God” (John 8:47). The themes of learning and knowledge are prevalent throughout the Bible, mostly in relation to our knowledge of God, but also to general knowledge (i.e., stewardship). If a congregation is to become a learning community, it must become a listening and hearing community. Romans 10:14 says, “How then will they call on him in whom they have not believed? And how are they to believe in him of whom they have never heard? And how are they to hear without someone preaching?” In the Bible the word “listen” appears more than 300 times. And in most instances, it relates to our listening to God.

The study of *listening to God* has been called “receptive theology” by Rev. Dr. John Kleinig. Pastor Kleinig asserts:

For Luther, the Christian life was not basically a matter of doing or of thinking. Rather, it was a ‘passive life’, a receptive state of being, the life that we receive from God, the life in which we produce nothing by ourselves but receive everything from God, the life in which we hear what He says and experience what He does to us. We receive and so ‘suffer’ what God does. We can think and act spiritually only because He is active on us, in us, and through us. Since we people of faith are always ‘passive’ recipients, we do not produce our own righteousness and holiness but possess ‘passive righteousness,’ and ‘passive holiness’ that we keep on receiving from Christ and never possess apart from him.<sup>27</sup>

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<sup>27</sup> John Kleinig, “Luther on the Practice of Piety,” *Lutheran Theological Journal* 48 (2014): 172–185, [http://www.johnkleinig.com/files/4614/3401/0360/Luther\\_on\\_the\\_Practice\\_of\\_Piety.pdf](http://www.johnkleinig.com/files/4614/3401/0360/Luther_on_the_Practice_of_Piety.pdf).



Paul describes the totality of receptive theology when he says in 1 Cor. 4:7 “What do you have that you did not receive?” In Titus 1:9, Paul admonishes Titus to be a steward of, or remain in, the “sound doctrine” he has received.

There are many Biblical examples of people listening to God and receiving hearing hearts and opened minds. One example is the story of Samuel when he was around 12 years old. It is recorded that in those days, “The word of the Lord was rare.”<sup>28</sup> Perhaps prior to “*those days*” God’s Word was plentiful.<sup>29</sup> Three times God called Samuel and the boy did not recognize God’s voice (1 Sam. 13:7). This does not mean Samuel lacked faith, it simply means God had not revealed himself to Samuel in this manner before. It seems God may have come to Eli like this before, however, because Eli knew exactly what to do. “So, Eli told Samuel, ‘Go and lie down, and if he calls you, say, *‘Speak, Lord, for your servant is listening*’” (1 Samuel 13:9a).

Even when the Word of God was “rare,” God kept calling His people. In Acts 17:27, we are told “God is not far from [any] of us.” Eli told Samuel to listen to God. God tells us the same throughout the Scriptures and the Biblical narratives. At Jesus’ baptism, God tells us explicitly, “This is my Son, whom I love; with him I am well pleased. Listen to him” (Matt. 3:17). As God gives us hearing and receptive hearts, we listen and learn, we experience *metanoia*, and our hearts and minds move toward alignment with our creator and God of all knowledge. Local churches are learning organizations, listening to, and learning from God and His divine Word.

### **Stewarding God’s People: Stages II and III – Knowledge ‘Sharing’ and ‘Storing’<sup>30</sup>**

A derivative of the church’s task to steward God’s mission is stewardship of God’s people.

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<sup>28</sup> 1 Samuel 3:1.

<sup>29</sup> The Word being rare may have been a consequence of it not being listened to, heard, or obeyed.

<sup>30</sup> See Appendix 1.

It is within the body of Christ, God’s people, that the knowledge of God is stored. David writes, “I have hidden your word in my heart that I might not sin against you” (Psalm 119:11). The Lord says in Deut. 11:18, “Fix these words of mine in your hearts and minds; tie them as symbols on your hands and bind them on your foreheads.” And then Solomon writes in Proverbs 2, “My son, if you accept my words and store up my commands within you ... then you will understand the fear of the Lord and find the knowledge of God.” While the organizations of the world store data in knowledge repositories or information databases, God stores His knowledge within the hearts and minds of people (living repositories).

It is also from within the body of Christ, God’s people, that the knowledge of God by the Holy Spirit is shared. In the Great Commission, the Lord set forth His clear mandate, or “Mission” for the church collectively. Every Christian church shares the same Gospel Mission: to go and share the message of forgiveness of sin, life, and salvation in Jesus Christ alone (Matt. 28:19–20). What that looks like (Vision—Strategic Ministry Plan) will be different for each congregation. Rev. Dr. Peter Steinke explains that the root of the word ‘disaster’ comes from two Greek terms, one for ‘distance’ and the other for ‘star.’ When sailors lost sight of their star at sea, they associated this with the term ‘disaster.’ Too often churches lose sight of their star: their purpose, their mission and vision. At some point the vision was no longer shared. Ultimately, God will fulfill His good purposes for each local congregation while the congregation continues in prayer and perseverance (Jer. 29:11–13).

Local ministries are called to be a blessing in both the community of believers and the greater society. As congregational ministries mature and become more complex, or volunteers and their time become scarcer, the task of managing those human resources becomes more demanding. Congregations must be careful to avoid asking any one person to over-function in a

manner that others in the congregation are encouraged to under-function.

The story of the widow and her mite provides an excellent stewardship classroom.<sup>31</sup> In

Mark 12:38–44, Mark writes:

As he taught, Jesus said, “Watch out for the teachers of the law. They like to walk around in flowing robes and be greeted with respect in the marketplaces, and have the most important seats in the synagogues and the places of honor at banquets. They devour widows’ houses and for a show make lengthy prayers. These men will be punished most severely.”

Jesus sat down opposite the place where the offerings were put and watched the crowd putting their money into the temple treasury. Many rich people threw in large amounts. But a poor widow came and put in two very small copper coins, worth only a few cents. Calling his disciples to him, Jesus said, “Truly I tell you; this poor widow has put more into the treasury than all the others. They all gave out of their wealth; but she, out of her poverty, put in everything—all she had to live on.”

In Mark’s Gospel, the Lord’s theology of money has much to do with the interplay between parties. Exchanging money, goods and services, forces everyone into relationship. With money, the Lord has the church in a position where all members of the body of Christ must learn to play nicely in Christian love, bringing people into relationship with Himself and each other. Jesus begins by identifying the players and their relationship to each other on the field. The parties Jesus highlights in this theology of money are individual members (the widow), the pastors (his disciples), and the officials in high places of power in the religious institution (the pharisees). These parties were unaware of how they were systemically impacting one another. Jesus ends the conversation by teaching His disciples that the size of the gift is not important, but the faith of the giver is important. Similarly, pastors, wealthy members, and institutional officials should avoid burdening another’s conscience about the size and manner of their contributions, and instead invest in building one another up in faith (1 Thess. 5:11).

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<sup>31</sup> This metaphor has Jesus as teacher and the disciples and us as His students.

Paul describes well how we are to respect fellow believers and their spiritual gifts in 1 Cor. 12. In 1 Cor. 12:7, Paul highlights the gifts were given by God, the Holy Spirit. Every Christian has received a gift, and these gifts are intended to be used to benefit fellow believers (Eph. 4:12). Some Christians may be generous in giving above and beyond tithing; others may be generous in their giving toward building up the community of believers through storing up and sharing knowledge of God’s love and forgiveness. It behooves church and school ministries to remove all obstacles that hinder God’s people from using and exchanging their gifts in the marketplace of humanity for the common good and the fulfillment of God’s mission for the church on earth (Heb. 12:1).

#### **Stewarding God’s Things: Stage IV – Knowledge Retrieval<sup>32</sup>**

A further derivative of the church’s task to steward God’s mission is stewardship of God’s property, through the effectual use of all God’s creation,<sup>33</sup> specifically money. Since we do not live in a world in which God provides all our material needs immediately<sup>34</sup> (nor one that presently operates through barter) money necessarily functions as a means of exchange. Money is the stored value of time and talent<sup>35</sup> that is retrieved when used in exchange. Understanding how God works through means, such as money and the economy, can help local congregations better use God’s means to serve their neighbor and reach the lost.

Otto A. Piper observes that Luther’s view of money was held together “by his view of the overruling providence of God and his loving care for this world.”<sup>36</sup> Piper’s observations about

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<sup>32</sup> See Appendix 1.

<sup>33</sup> See Eph. 1:22, “God placed all things under his feet and appointed him to be head over everything for the church.”

<sup>34</sup> God provides through means.

<sup>35</sup> Ronsvalle and Ronsvalle, *Behind Stained Glass Windows*, 167.

<sup>36</sup> Otto A. Piper, “Money.” In *The Encyclopedia of the Lutheran Church*, edited by Julius Bodensieck, 1661–

Luther on money square with Luther's views on other matters of doctrine and Christian living. For example, the view that God works providentially through money to care for His creation squares with Luther's doctrines on vocation, *Larvae Dei* and *Deus Absconditus*. When Adam first walked with God in the Garden of Eden, he needed no intermediary between himself and God. But, since the Fall, no one may see God and live (Exod. 33:20), so God works through coverings (or means) to provide for man's needs.<sup>37</sup> In Luther's doctrine of *Larvae Dei*, God is covered, or hiding, in the waters of holy baptism, in the bread and wine of holy communion, in the cross on which Jesus died, in the person Jesus Christ, in the written Word of Scripture, in the church, in individuals, and so on. It may be said that God is also hiding in money and other economic activities (vocation) to provide for His creation.

Piper explains that Luther believed money should be paid in exchange for labor and not from interest, hence "the church had forbidden the taking of interest."<sup>38</sup> When the new capitalism emerged, Luther was opposed to money being made separately from labor; a similar sentiment to 2 Thess. 3:10, "For even when we were with you, we commanded you this: If anyone will not work, neither shall he eat." Luther explains how when Jesus commanded Peter and the fishermen to let their nets down on the other side in Luke 5, "He teaches a twofold lesson, that he will not give us anything unless we work for it, and that the things that we obtain do not come from our work, but from God's help and blessing. You are to work, but you are not to depend upon that work, as if that which resulted from it were of your own accomplishment. Our work produces and bestows nothing. Yet it is necessary as a means through which we may receive what God

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2. MN: Augsburg, 1965.

<sup>37</sup> Martin Luther, "Luther's Use of *Larvae Dei*," review of *Luther's Works Volume 1*, by Anthony Steinbronn, <http://reverendluther.org/pdfs2/Larvae-Dei.-Masks-of-God.-Chap-1.pdf>.

<sup>38</sup> Piper, "Money," 1661.

gives.”<sup>39</sup>

Luther “adopted the medieval concept” that “money in itself does not produce economic values.”<sup>40</sup> He reasoned that the new capitalism caused people to chase money, separate from the source of the provision (i.e., idolatry). But “Luther was a realist, and he knew that no man could live outside of the economic order. It is a necessity of nature for fallen mankind.”<sup>41</sup> Since no one can exist outside the economic order, “*justum pretium*, the right price” should apply in this fallen world and be guided by the authorities.<sup>42</sup> Luther was not willing, however, to leave economic life entirely to itself. God’s providence rules over sinful life, too, as is evidenced by natural law.”<sup>43</sup>

Luther describes God’s providential hand in caring for Noah and the animals, saying, “It would have been an easy matter for God to preserve Noah and the animals for the space of a full year without food...But God in the government of the things created allows them to perform their functions. In other words, God performs his miracles along the lines of natural law;”<sup>44</sup> and “Noah is here enjoined to employ the ordinary methods of gathering food. God did not command him to expect in the ark a miraculous supply of food from heaven.”<sup>45</sup> These observations by Luther (and the Biblical sources) challenge a common practice in local churches today in which building projects and other mission efforts are said must press forward with little to no resources, but instead by faith. In the absence of immediate revelation (i.e., Elijah and the widow at Zarephath, 1 Kings 17:7–24), God uses means through which to provide for His church and

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<sup>39</sup> John Sander, *Devotional Readings from Luther’s Works* (Rock Island, ILL: Augustana, 1915), 288–289.

<sup>40</sup> Piper, “Money,” 1661.

<sup>41</sup> Piper, “Money,” 1661.

<sup>42</sup> Piper, “Money,” 1661.

<sup>43</sup> Piper, “Money,” 1661.

<sup>44</sup> Sander, *Devotional Readings*, 292.

<sup>45</sup> Sander, *Devotional Readings*, 292.

advance His mission.

Piper suggests that Phillip Melancthon and other supporters of Luther may have gone further than Luther had intended in pointing out the believer's simultaneous participation in a "life ruled by faith" and life lived in capitalist economic activity.<sup>46</sup> He notes, "Under Melancthon's influence, however, the duality became one of Gospel and Law, of which the former one is revealed, but concerned with the individual's soul only, whereas the latter, while taking care of the things of this world, is of purely secular origin and purpose."<sup>47</sup> Piper describes, "Hence the believer would move in two unrelated realms."<sup>48</sup>

John and Sylvia Ronsvalle agree with Luther's view of money as a means for God's provision. They define money as stored value, noting, "since money is the product of labor, money is ultimately a form of God's time and talent, stored in creation of the world and made available for human use."<sup>49</sup> "Money is also the inheritance of parents' time and talents," they add.<sup>50</sup> Nordan Murphy said, "I've always felt our money is a symbol of who we are. We invest our blood, sweat, and tears and work hard to get it. And what we think of it reveals who we are. If we are generous or stingy – our internal self is there. The old concept of 'your money is you' – when you give it away, you're giving away part of yourself."<sup>51</sup> The authors suggest, "when people give money away, they are not just parting with a possession – they are actually affecting their future potential. The culture would suggest they are diminishing their possibilities, while

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<sup>46</sup> Piper, "Money," 1661.

<sup>47</sup> Piper, "Money," 1662.

<sup>48</sup> Piper, "Money," 1662.

<sup>49</sup> John Ronsvalle and Sylvia Ronsvalle, *Behind the Stained Glass Windows: Money Dynamics in the Church* (Grand Rapids, MI: Baker Books, 1996), 165.

<sup>50</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 165.

<sup>51</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 167.

the Gospels would suggest they are expanding them.”<sup>52</sup>

Since God is at work in providing for our needs through money and economic activity, seeking more than what God has provided or in a different manner from how God has provided, is greed. Luther says, “The believer is reminded that in their obsession with money people practice idolatry. Money has become the supreme good from which security and happiness are expected.”<sup>53</sup> The Ronsvalles agree: “Greed, then, can be equated with idolatry”<sup>54</sup> and Robert Wood Lynn adds, “humans, as a result of the Fall, have an insufficient sense of being and so compensate by having.”<sup>55</sup>

Michael Lockwood warns,

To transfer the trust that belongs to God to these earthly things would be to turn them into idols. Therefore, we should not be disturbed when the earthly things we need are lacking and God seems slow in answering our prayers, so that all we have to cling to is his Word. Rather, we should trust in him to provide. Luther writes, ‘God will save through the sword if it is at hand, and without the sword if it is not available. Hence, one must use things, but one must not trust in them. Only in God should one trust, whether that which you may use is at hand or lacking.’<sup>56</sup>

The stewardship implications are that we should neither neglect the means God uses to provide nor “put our confidence in these earthly means but in God alone.”<sup>57</sup>

Satan also uses means to effectuate *his* purposes and to derail God’s. Luther says in his famous Galatians commentary: “When Satan cannot suppress the preaching of the Gospel by force, he tries to accomplish his purpose by striking the ministers of the Gospel with poverty. He

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<sup>52</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 167–8.

<sup>53</sup> Piper, “Money,” 1661.

<sup>54</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 165.

<sup>55</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 165.

<sup>56</sup> Michael A. Lockwood, *The Unholy Trinity: Martin Luther Against the Idol of Me, Myself, and I* (Saint Louis, MO: Concordia, 2016), 48–49.

<sup>57</sup> Lockwood, *The Unholy Trinity*, 48.



curtails their income to such an extent that they are forced out of the ministry because they cannot live by the Gospel.”<sup>58</sup> John Kleinig describes a front door and back door attack by Satan on believers.<sup>59</sup> In the case of attacking the ministers of the Gospel, a front door attack would be to cause the ministers to sin, abuse their office, come to dislike the ministry, or lose their faith. A back-door approach would be to drive the ministers out of their office through hardship or physical necessity. While Satan loves to employ these kinds of attacks on the church of God, God “does not just allow Satan to attack us in this way; He actually uses it to fulfill His plans for us.”<sup>60</sup>

Jon Bonk’s *Missions and Money: Affluence as a Western Missionary Problem* asks the question: “Does money today so obfuscate interchurch relations as to distort the Gospel? For both members of the long established and younger churches?”<sup>61</sup> Bonk observes, “...’mission’ churches in the South[ern hemisphere] cannot exist without money; but neither do they necessarily thrive if money is available in abundance.”<sup>62</sup> This sentiment reminds me of King David’s prayer in Psalms 30:8–9: “give me neither poverty nor riches; feed me with the bread that is my portion. Otherwise, I may have too much and deny you, saying ‘Who is the Lord?’ Or I may become poor and steal, profaning the name of my God.”

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<sup>58</sup> Martin Luther, *Luther's Works: Galatians Commentary* (St. Louis, MO: Concordia, 1963), 237–51.

<sup>59</sup> John Kleinig, *Grace Upon Grace: Spirituality for Today* (St. Louis, MO: Concordia, 2008), see generally, 233–36.

<sup>60</sup> Kleinig, *Grace Upon Grace*, 233.

<sup>61</sup> Jonathan J. Bonk, *Missions and Money: Affluence as a Western Missionary Problem* (Maryknoll, NY: Orbis Books, 1991), 43.

<sup>62</sup> Bonk, *Missions and Money*, 43.

## HISTORICAL CONTEXT

### The New Protestant Churches and the New Capitalism

Stewardship concerns became a new problem for the Reformation (new protestant) churches. The new protestant churches during Luther's time were cut off from the coffers of the Roman Catholic church. They went from being reliant on the Roman Catholic church to having the responsibility of funding their own missions and ministers.<sup>63</sup> Luther notes how the parishioners could give freely to buying indulgences but hesitated once it came to support the preaching of the pure Gospel.<sup>64</sup> The new protestant model was initially instrumental in establishing a free and autonomous German Lutheran church, wherein "a vast effort [was] made by the human mind to achieve its freedom; it was a new-born desire which it felt, to think and judge freely and independently ... It was a great endeavor to emancipate human reason; and, to call things by their right names, it was an insurrection of the human mind against the absolute power of the spiritual order."<sup>65</sup> But, by the time C.F.W. Walther<sup>66</sup> went to America with the German Lutheran immigrants,<sup>67</sup> the German Lutheran church had become reliant on the princes (government) instead of the "Holy Roman Empire."

Society had also changed to include the advancement of the "'third estate,' composed of merchants and artisans."<sup>68</sup> Along with the development of the idea that "mankind had matured

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<sup>63</sup> F.V.N. Painter writes, "Luther wrote regularly to the princes asking for their support in funding protestant churches and schools, such as the following: "If we must annually expend large sums on muskets, roads, bridges, dams, and the like, in order that the city may have temporal peace and comfort, why should we not apply as must to our poor, neglected youth, in order that we may have skillful school-master or two." (F.V.N. Painter, *Luther on Education*, (St. Louis, MO: Concordia, 1889), 174.

<sup>64</sup> Painter, *Luther on Education*, 174.

<sup>65</sup> Painter, *Luther on Education*, 174.

<sup>66</sup> German Lutheran pastor and first president of the LCMS.

<sup>67</sup> October 25, 1811–May 7, 1887.

<sup>68</sup> D.H. Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, (Philadelphia, PA: The Lutheran Publication Society, 1917), 13.

sufficiently to take its destiny into its own hands,”<sup>69</sup> many early settlers saw an opportunity in America to free themselves (once again) from religious oppression. Many of the immigrants felt they came readily prepared for the task of settling a new land. An article by Rebekah Curtis states: “The Saxons launched their fifth ship pointed toward American shores with dutiful hope. Edward T. O’Donnell notes that ‘most Germans arrived with the two things that distinguished them from the Irish: capital and skills.’”<sup>70</sup> The immigrants’ ships were loaded with money, skilled artisans, church artifacts, and belongings which would tide the immigrants over against the many hardships.<sup>71</sup> The goal for C.F.W. Walther<sup>72</sup> and his fellow German immigrants arriving on the scene in America in the early 1800s had been, “the hope of preserving the most holy treasures of the Reformation Church for themselves and their children.”<sup>73</sup> But, after three ships sank<sup>74</sup> and Martin Stephan misappropriated funds<sup>75</sup>, setting up an autonomous Lutheran church in America proved difficult.

The financial and economic woes they experienced caused the new colony to call into question their legitimacy as church. D. H. Steffens writes, “The discussions and debates were unending. It was impossible to escape them. . . . Their solution seemed impossible. A splitting up of the colony into a pitiable host of little separatistic groups seemed inevitable.”<sup>76</sup> Economic

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<sup>69</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 205.

<sup>70</sup> Rebekah Curtis, “American Lutheran History: Lutherans in Peril on the Sea,” *Lutheran Forum*, (Winter, 2016), 16.

<sup>71</sup> Curtis, “American Lutheran History,” 16.

<sup>72</sup> The 1<sup>st</sup> President of the LCMS, 1847–1850 and again 1864–1878.

<sup>73</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 140.

<sup>74</sup> Curtis, American Lutheran History,” 16.

<sup>75</sup> “Meanwhile Stephan acted as if their treasury was inexhaustible. He used 4000 thalers in seven months (three of them spent on shipboard) for his own household and personal comfort.” (Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 145).

<sup>76</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 145.

concerns became too difficult to overcome corporately. Scandal over philandering and finance almost reflected a comparable situation in Rome during Luther's time.<sup>77</sup> Due to the financial turmoil, the faith of these emigrants was challenged. "Doctor Jacobs describes the spiritual conflicts confronting these people, and especially their pastors, as follows: 'Was not the emigration a sin? Were they warranted, without a clearer indication of Providence, in abandoning the places where they had been put by God's call in Germany?'"<sup>78</sup>

The German Lutheran church in America was once again challenged to confront the problems of economic sustainability and autonomous capitalism. C.F.W. Walther is an example of a gifted pastoral steward. By God's grace working through Walther's theological leadership and organizational gifts, the new German Lutheran church established church in a manner that provided autonomy and a "faithful Lutheran union of congregations or Synod."<sup>79</sup> The matters related to corporate financing through comingling individual member funds forced Walther's church to grow in faith and seek a closer understanding of God's purposes for them in the new land and in relationship with one another.

Other protestant church bodies also questioned the desirability of the new capitalism. Former Member of Parliament for Smethwick, Baron P.C. Gordon Walker, contributes to theological thought on the role of money in the life of the Church in his article, "Capitalism and the Reformation."<sup>80</sup> The problem of capitalism, with its "pursuit by the individual of gain for its own sake," was blamed on the Reformation, or Protestant ethic.<sup>81</sup> Walker notes:

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<sup>77</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 145.

<sup>78</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 141.

<sup>79</sup> Steffens, *Doctor Carl Ferdinand Wilhelm Walther*, 253.

<sup>80</sup> Lewis W. Spitz, *The Reformation: Basic Interpretations Second Edition*, (Massachusetts: D.C. Heath And Company, 1972), 60–74.

<sup>81</sup> Spitz, *The Reformation*, 60.

The bombshell was dropped by Max Weber at the beginning of this century in a brilliant development of an idea suggested to him by W. Sombart in his 1902 edition of *Der Moderne Kapitalismus*. Sombart here proclaimed as the guiding force in the evolution of capitalism and the modern world the ‘spirit of capitalism,’ which consisted in the pursuit by the individual of gain for its own sake, in exact calculation, and the rigorous rationalization of every department of life. Max Weber in his *Protestant Ethic and the Spirit of Capitalism* (1904 – 1905) found a personal vehicle for this capitalist spirit in the Calvinist and the Puritan and demonstrated with ingenuity the causal connection between the doctrine of Calvinism and the inculcation into its adherents of the capitalist spirit.<sup>82</sup>

Walker notes neither the Protestants nor the Capitalists were at all pleased with Weber’s conclusion.<sup>83</sup> Instead they argued, “(a) that capitalism was much older than Protestantism, and (b) that many other factors had played a much larger part than Protestantism in the evolution of modern capitalism.”<sup>84</sup>

Instead of approaching the spirit of capitalism problem from what he calls the “psychology of the isolated individual,”<sup>85</sup> Walker argued for a different explanation for the role the Reformation period had on capitalism. He argues, “I shall approach the problem as a social one; ask what were the social and economic needs of society at the time of the Reformation; and then examine how far the Reformation (amongst other factors) was a response to these needs.”<sup>86</sup> He argues that focusing on the “Protestant work ethic” is a “gravely misleading method of approach.”<sup>87</sup> Rather he argues, “Social outlook can only be changed, e.g., from feudal to bourgeois, by a sufficiently powerful bourgeois bloc in the society, not by the mere presence of individual capitalists.”<sup>88</sup>

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<sup>82</sup> Spitz, *The Reformation*, 60.

<sup>83</sup> Spitz, *The Reformation*, 60.

<sup>84</sup> Spitz, *The Reformation*, 61.

<sup>85</sup> Spitz, *The Reformation*, 64.

<sup>86</sup> Spitz, *The Reformation*, 64.

<sup>87</sup> Spitz, *The Reformation*, 62.

<sup>88</sup> Spitz, *The Reformation*, 62.

## From Capitalism to Financialization

Mainline protestant churches' positions on money still seem unresolved. On the one hand, church institutions establish endowments in perpetuity, implement investment policy statements, and hire sophisticated gift planning professionals along with development departments, to increase assets under management. On the other hand, individual churches proceed forward "on faith" and talk about the evils of hoarding. Autonomous churches and individual ministers are assessed based on their economic success. It appears to boil down to a need to develop a theology of money and its "holy use."<sup>89</sup> John and Sylvia Ronsvalle urge the need for building a theological framework to avoid internal focus. They write, "The issues need to be identified in order to be clearly faced. Without a clear theological framework or constructive use for money that focuses the congregation outward, congregations have turned inward."<sup>90</sup>

"Churches have a pre-1950s mindset toward money and haven't provided a positive agenda in an age of affluence,"<sup>91</sup> suggest the Ronsvalles in *Behind the Stained Glass Windows: Money Dynamics in the Church*. They later follow this idea of the "age of affluence" with a description: "increased personal debt, smaller amounts of resources are available for personal giving."<sup>92</sup> The Ronsvalles are describing income inequality or wealth disparity.

They note that people aren't giving enough money; at least not for "denominational support, seminary support, international missions, and so forth ...."<sup>93</sup> As a result, "regional and national denominational offices are no longer trimming the fat from budgets, as one national

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<sup>89</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 165.

<sup>90</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 165.

<sup>91</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, dustcover.

<sup>92</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, dustcover.

<sup>93</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 305.

leader termed it, but have had to start carving into muscle.”<sup>94</sup> The Ronsvalles’ research discovered denominational leaders are counteracting shrinking denominational support from congregations by going directly to generous high-capacity donors.<sup>95</sup> “Several denominations have begun to consider whether large donors who are underchallenged at the congregational level might not want to become more directly involved in making contributions to the denominational level.”<sup>96</sup> The fact that there are fewer, larger donors is at least some evidence many church members find their wealth shrinking, while a few find their wealth increasing.

Wealth disparity is well-documented as an increasing phenomenon in the United States but has not been the topic of much study in the LCMS. Since member churches and institutions participate in the country’s economy, this trend likely has an impact on both local churches and the institutional church economically and culturally. Pew Research Center documents trends going back several years, hinting that the LCMS is following similar trends to the surrounding communities.<sup>97</sup> The LCMS is 95% white and historically upper middle- to middle-class.<sup>98</sup> More research is required to show how deep and sustained the trend toward wealth disparity is in the LCMS.<sup>99</sup>

It appears a trend may be forming toward fewer, bigger churches and schools, with large

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<sup>94</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 30.

<sup>95</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 88.

<sup>96</sup> Ronsvalle and Ronsvalle, *Behind the Stained Glass Windows*, 88.

<sup>97</sup> Pew Research Center. “Racial and Ethnic Composition among Mainline Protestants.” Religious Landscape Study. Accessed October 30, 2021. <https://www.pewforum.org/religious-landscape-study/religious-tradition/mainline-protestant/>.

<sup>98</sup> According to Pew Research Center, there are only two other religious groups in America less racially diverse than the LCMS: the Evangelical Church of America (96% white) and the National Baptist Convention (99% black). Interestingly, the ELCA’s efforts to become more diverse have had the opposite effect on racial diversity. Accessed October 30, 2021. <https://www.pewforum.org/religious-landscape-study/religious-tradition/mainline-protestant/>.

<sup>99</sup> “Racial and Ethnic Composition among Mainline Protestants.” Religious Landscape Study. Accessed October 30, 2021. <https://www.pewforum.org/religious-landscape-study/religious-tradition/mainline-protestant/>.

donor gifts accumulating in the even larger institutions (universities, districts, and Synod).<sup>100</sup> The Synod is looking more like a bigger firm (maybe a multinational corporation), having paid off all its debt on June 19, 2019. According to David Strand, “This is the first time in living memory that all Synod indebtedness to external entities stands at zero.”<sup>101</sup> He cites BOD Chairman Rev. Dr. Michale L. Kumm who says, “This is a milestone achievement because paying off the historic debt will free up millions of dollars in mission and ministry funds for years to come.”<sup>102</sup>

In contrast, trends in local churches and schools have been following trends in local businesses.<sup>103</sup> Local churches and schools rattle around in underutilized buildings with heavy mortgage, maintenance, and utility obligations. The Ronsvalle’s Stewardship Project observed:

Constructing new church buildings is actively promoted by denominations and fundraising consultants as a creative way to build enthusiasm and revitalize congregations. One fundraising consultant pointed out that the theory used to be that a congregation ought to have a building project every few years. He advised that the idea is now for a church to always be in some stage of a building project to keep people involved in the life of the church.<sup>104</sup>

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<sup>100</sup> For example, I have met with district presidents who have discussed a strategy to promote partnerships and mergers between small churches with bigger ones. Teaming configurations which would allow for staff share, ministry efficiencies, capitalize on strengths and location, and overall create healthy leverage for the promotion of the Gospel. One District President suggested if the little congregations who are holding out do not come around then it will only be a matter of time and their doors will close and hopefully those assets will be redeployed elsewhere in the district for the good of the Kingdom. The District President prays the smaller congregations will be open to partnering to create what they believe will be better stewardship of resources.

<sup>101</sup> David Strand, “Synod’s External Debt is No More: ‘A Milestone Achievement’,” Reporter, (June 19, 2019): <https://blogs.lcms.org/2019/synods-external-debt-is-no-more-a-milestone-achievement/>.

<sup>102</sup> Strand, “Synod’s External Debt,” <https://blogs.lcms.org/2019/synods-external-debt-is-no-more-a-milestone-achievement/>.

<sup>103</sup> The latest Covid-19 crisis has exacerbated this trend toward big firms, as many small businesses in the country have closed their doors while big firms are prospering. For example, on May 11, 2020, Elon Musk (CEO of Tesla) defies stay at home order and reopens Tesla plant, something small business would not be able to get away with. Other examples are the scores of publicly traded companies cashing in on the government’s small business loan program intended for small businesses and the increase in size of nationwide and global online ordering.

<sup>104</sup> “Financialization,” Macroeconomics, Investopedia Team, accessed October 31, 2021, <https://www.investopedia.com/terms/f/financialization.asp>.



The argument for constructing new church buildings is an attempt at repeating trends from the old style of industrial capitalism that profited mainly “from exploitation in production.”<sup>105</sup>

Unfortunately, this old style of capitalism has served primarily to drain resources and increase the indebtedness of local church and school ministries.<sup>106</sup> Sometimes building projects cause conflicts and congregational splits.

Local schools are closing at an even faster rate than local churches, due to their greater sensitivity to market forces and their dependence on direct tuition payments from local families. In 2012/13, the LCMS Lutheran Schools Statistics reported a combined total number of 2,335 early learning centers, elementary schools, and high schools. Five years later, during the 2017/18 school year, LCMS Lutheran Schools Statistics reported a total of 1,992 early learning centers, elementary schools, and high schools.<sup>107</sup> From the 2012/13 school year to the 2017/18 school the LCMS realized 343 school closures, a 14.7% closure rate over five years.

Borrowing from Walker, “I shall approach the problem as a social one.”<sup>108</sup> Focusing on the individual church or the individual steward is a “gravely misleading method of approach.”<sup>109</sup> Consequently, this research project positions the visual map for congregational stewardship decision-making into a historical and social context. The historical events through which God’s people have learned about, participated in, and shared God’s mission have unfolded through God’s use of earthly means (instruments). God’s people have experienced social and practical

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<sup>105</sup> Investopedia Team, “Financialization.”

<sup>106</sup> Too much exploitation of parish resources has a similar effect to “too much exploitation of existing knowledge (adaptive learning) [that] may result in it becoming outdated and useless.” See footnote 86.

<sup>107</sup> Information obtained from the LCMS School Ministry Office, LCMS Districts and the LCMS Office of Rosters and Statistics.

<sup>108</sup> Spitz, *The Reformation*, 62.

<sup>109</sup> Spitz, *The Reformation*, 62.

pressures, leading them to relearn what God’s good purposes are for their lives and for the church in the greater *Missio Dei*. The effects of financialization felt by individual members in their day-to-day lives are felt by local churches in their day-to-day operations.

Money is used differently today than it was used historically, necessitating new mental maps. The generous members that make up our congregations today are facing a new, and foreign, economic landscape with changing laws related to non-profits, income tax, gifting, deferred compensation plans<sup>110</sup>, and personal retirement plans.<sup>111</sup> And when resources reach local churches, resources are being mismanaged: church workers, committees, buildings, and funds are ineffectively utilized. Churches not blessed with shrewd and knowledgeable stewards are operating at deficits and going further into debt. Church workers are over-worked, many are subsidizing budget shortfalls, and some are experiencing burnout. Attendance is shrinking, membership is declining, and local churches are closing their doors. But, while membership is shrinking, institutional and agency assets are on the rise.<sup>112</sup> At some level, such stewardship issues affect every congregation and every professional church worker.

The consensus that we live in an age of financialization has gained influence among economists, financial analysts,<sup>113</sup> and other church bodies (such as the Catholics and Reformed)<sup>114</sup>

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<sup>110</sup> Today’s modern employees are often compensated by perks and fringe benefits, that are either deferred or not in actual dollars, for example, a company car, subsidized meals, trips, etc. These fringe benefits reduce the actual take-home income and thereby the member’s tithes and offerings.

<sup>111</sup> The employer-employee landscape has been tipped on its ear, and costs have shifted to the employee, meaning an employee’s income after tax (due to benefit deductions and rising taxes) is shrinking. Employees are now being asked to “absorb” the cost of the elimination of pension plans, rising cost of health care, and funding retirement.

<sup>112</sup> According to David Strand, “This is the first time in living memory that all Synod indebtedness to external entities stands at zero.” Accessed October 31, 2021. <https://blogs.lcms.org/2019/synods-external-debt-is-no-more-a-milestone-achievement/>.

<sup>113</sup> Charles A. McDaniel, Jr. “Theology of the ‘Real Economy’: Christian Economic Ethics in an Age of Financialization.” *Journal of Religion and Business Ethics* Volume 2, Article 1. (September 2011): 1–30, <https://via.library.depaul.edu/cgi/viewcontent.cgi?article=1030&context=jrbe>.

<sup>114</sup> McDaniel, “Real Economy,” 1–30.

but is yet to be explored as it applies in the LCMS. McDaniel likens the financialization process to “economic activity shifts from ‘real’ production of goods and services to ever more complex forms of financial transacting.”<sup>115</sup> Investopedia defines financialization as “the increase in size and importance of a country’s financial sector relative to its overall economy. Financialization has occurred as countries have shifted away from industrial capitalism.”<sup>116</sup>

Economist Michael Roberts criticizes financialization that it has led to “unproductive” capitalism: “financialization is now mainly used as a term to categorize a completely new stage in capitalism, in which profits mainly come not from exploitation in production, but from financial expropriation (resembling usury) in circulation.”<sup>117</sup> Other research shows that big firms dominate the new financialized economy, because of “their ability to cater to and play in financial markets.”<sup>118</sup> The GIST visual map is a tool designed to help congregations make the necessary strategic decisions in navigating this new economic landscape.

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<sup>115</sup> McDaniel, “Real Economy,” 1.

<sup>116</sup> Investopedia Team, “Financialization.”

<sup>117</sup> Investopedia Team, “Financialization.”

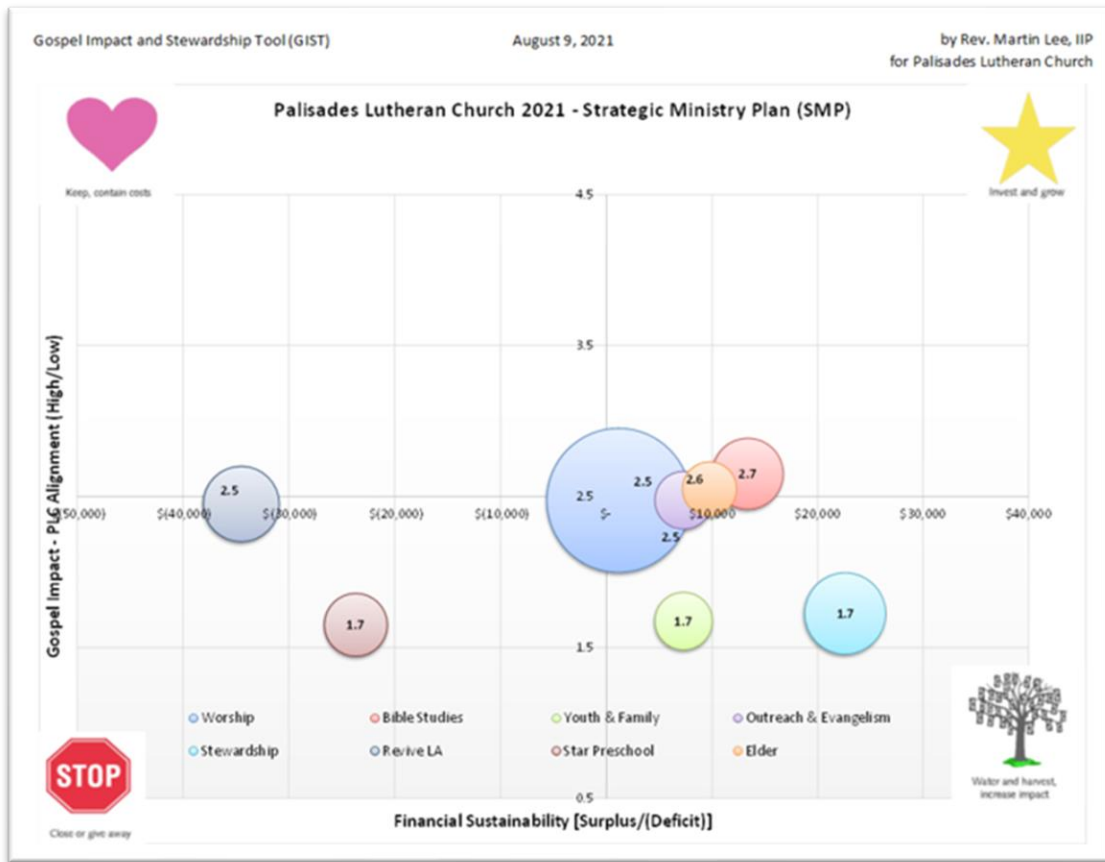
<sup>118</sup> Investopedia Team, “Financialization.”

# CHAPTER FOUR

## THE PROJECT DESIGN AND METHODOLOGY

### The GIST Ministry Map

Figure 1: Gospel Impact and Stewardship Tool (Matrix Map)



The research undertaken for this project is to determine whether a visual map may be useful for aligning ministry efforts to improve Gospel impact and financial health for present vitality and future sustainability in local congregations like Palisades Lutheran Church. The research from this study culminates in the Gospel Impact and Stewardship Tool (GIST) which assists church leaders to place core ministries onto a Matrix Map (as adapted for the congregational setting—Ministry Map), consisting of four quadrants: “The Star: High Gospel

Impact, High Financial Viability,” “The Stop Sign: Low Gospel Impact, Low Financial Viability,” “The Heart: High Gospel Impact, Low Financial Viability,” and “The Money Tree: Low Gospel Impact, High Financial Viability”<sup>1</sup> (See below and also Appendix 2).

Figure 2: Matrix Mapping Imperatives



The GIST tool makes a complex organizational system simple by providing a visual map of the congregation’s ministry landscape. Putting together a GIST Ministry Map calls for plotting your congregation’s core ministries according to their Gospel impact and financial viability as determined through the processes discussed below. The hope is by using the GIST Ministry Map church leaders will realize a sudden clarity on how the congregation’s different activities inter-relate. Beyond helping leaders better understand their ministries’ effectiveness, the GIST Ministry Map can help congregational leaders prioritize which ones to fund and at what rate.

The GIST tool and GIST Ministry Map are meant to focus the strategic ministry planning process and not *be* the process. The research project confirms what the authors described: the tool is powerful, but it is not conclusive.<sup>2</sup> The GIST tool and GIST Ministry Map certainly

<sup>1</sup> Bell, et al., *Nonprofit Sustainability*, 75 – 95.

<sup>2</sup> Bell, et al., *Nonprofit Sustainability*, 171 – 173.












initiated conversation, grabbed attention, and leaders leaned into the process.

Each step involved in the GIST activity prompted the leaders to reflect on each ministry in light of the bigger mission, God's mission. In step one, the leaders have to consider which activities they will identify as core ministries; that is, where they spend the majority of their time. Step two explores how each ministry aligns with God's mission and the congregation's Vision. Step three evaluates how the congregation has allocated resources to advance each ministry. Step four plots the results of ministry impact and financial viability to illustrate which ministries have higher impact. Step five gives the leaders an opportunity to evaluate strategic imperatives, implied choices about what actions to take for each ministry. Depending on where an activity is placed on the map, strategic imperatives emerge and are placed on the Gospel Imperatives Decision Table (Appendix 19).

### Gospel Imperatives

A natural outcropping of visually plotting the ministries in the quadrants is a decision on whether to make any changes to the ministries for improvements. The Gospel Imperative Decision Table below shows what possible decisions could be made based on the ministry's position on the GIST Ministry Map: The Star quadrant, invest and grow; the Heart quadrant, keep and contain costs; the Stop Sign quadrant, close or give away; the Money Tree quadrant, water and harvest, increase Gospel impact (Appendix 2). Each of the eight core ministries at PLC received a Gospel imperative on the Gospel Imperative Decision Table to help with strategic decision-making (Appendix 19). Gospel Imperative Decision Table action items for PLC are to be determined (TBD) and will be voted on by voting members after the congregational self-study.

Figure 1 - Gospel Imperatives Decision Table

PLC CORE MINISTRIES	QUADRANT	GOSPEL IMPERATIVE ("Relative")	ACTION
Worship	 	Keep. Contain costs. Invest grow, increase Gospel impact.	TBD
Bible Study		Keep. Contain costs. Invest and grow.	TBD
Youth and Family		Water harvest and increase Gospel impact.	TBD
Outreach and Evangelism	 	Keep. Contain costs. Invest and grow, increase Gospel impact.	TBD
Stewardship		Water harvest and increase Gospel impact.	TBD
Revive LA	 	Close or give away. Keep. Contain costs.	TBD
STAR PreSchool		Close or give away.	TBD
Elders		Keep. Contain costs. Invest and grow.	TBD

The Gospel Imperatives Decision Table assists congregations to take inventory of all the Lord has entrusted to their care, and to contemplate how well they are stewarding the Lord’s resources for Gospel impact in the world. These strategic imperatives call for actions that would strengthen the effectiveness of each ministry’s reach and viability – or for tough decisions to allocate resources elsewhere. Considering whether to keep ministries or let them go are not easy decisions with easy answers. Instead, the GIST Ministry Map and Gospel Imperatives Decision Table can help engage PLC members and leaders to prayerfully recruit the congregation’s best thinking on God’s mission plan for PLC.

Zimmerman explains that the strategic imperatives that emerge from the Matrix Map, create forced choices. Zimmerman notes, “In a forced-choice model, an action or decision is suggested by the analysis. It isn’t necessary, of course, to make the choice to which the analysis points. But if the strategic imperative is rejected, it’s important to have strong, compelling

reasons why a different choice is being made.”<sup>3</sup> He adds, “Another advantage of a forced-choice model is that it prevents a group’s making a decision by not making a decision.”<sup>4</sup> King Solomon says a wise person seeks much council (Proverbs 15:22). The congregation’s best thinking may help the congregation define and agree on strategic actions that become Gospel imperatives for the congregation as they contemplate their participation in the *Missio Dei*.

## **RESEARCH DESIGN**

### Population Sampling

All active members and leaders of Palisades Lutheran Church are involved in the action research portion of this study. Additionally, all active members and leaders of PLC participated in a variety of mixed research qualitative and quantitative assessments used in this project. Fifty-one members and leaders signed up for one-on-one interviews, more than PLC’s average weekly attendance. In addition, PLC Church Council members and Elders were invited to participate in the Gospel Impact Survey, a GIST Leader’s Evaluation Survey, and multiple Council and Elders’ meetings. The finance committee helped gather the data for the financial health portion; a group of nine members was asked to participate on the Transition Task Force; and, finally, all PLC members are invited to participate in the cottage meetings, town hall meetings, and voters’ assembly to vote on which TTF recommendations the congregation would like to adopt and how to respond to Gospel imperatives action items.

Palisades Lutheran Church (PLC) officially began in 1970 as the result of the merger of two Lutheran churches: Lutheran Church of the Palisades from the American Lutheran Church (ALC) and Holy Cross Lutheran Church from the LCMS. The union was “blessed” by both

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<sup>3</sup> Bell, et al., *Nonprofit Sustainability*, 76.

<sup>4</sup> Bell, et al., *Nonprofit Sustainability*, 76.



synodical bodies, as the two were in altar and pulpit fellowship. At the time both congregations were pastor-sized, worshipping 100–125 in average weekly attendance. With both congregations coming together, PLC had an average weekly attendance of 200–250. Each church provided its own pastor. When the ALC merged with the Evangelical Lutheran Church of America (ELCA), the PLC congregations elected to remain together; although, over time, relations with the LCMS became strained due to the significant doctrinal differences over the divinity, clarity, and reliability of Scripture. Today PLC is much more aligned with an ELCA view of theology and practice than LCMS.

According to the “Palisades Lutheran Church By-Laws Approved by the Congregation March 28, 2004, and Amended in 2017,” new members are able to join either Holy Cross Lutheran Church (LCMS) or Lutheran Church of the Palisades (LCMC) “following instruction in the common doctrines and confessions shared by both national bodies, LCMC and the LCMS.” As for clergy, from 1970 to 1992, PLC had one pastor from each church body. But in 1992, when the LCMS pastor retired, PLC could only afford one pastor and kept the ELCA pastor as sole pastor. Around 2015, the ELCA pastor led the congregation through a transition from the ELCA to Lutheran Congregations in Mission for Christ (LCMC), leaving the ELCA over the matter of same sex unions. Ultimately, PLC became an LCMC/LCMS dual denominational congregation in response to circumstances rather than through strategic ministry planning, the doctrinal conviction of members, or meeting community needs.

It was not easy finding the average weekly attendance numbers for the last 10 years. Most LCMS congregations submit an annual reporting form to the Rosters and Statistics Department of the LCMS, and these numbers are included in that report. When I called the District Office, I was informed PLC has not submitted the annual Congregation Statistics Report since 2014. The

Pacific Southwest District of the LCMS recorded that in 2014 PLC reported an average weekly attendance of 90. In 2021, the average weekly attendance is 42. PLC has realized a 53% decline, or 7.5% annual average decline, since reporting an average weekly attendance of 90 in 2014. One member noted this downward trend predates both Covid-19 and PLC's most recent settled pastor. From the time of the merger in 1970 to present, the average weekly attendance has declined from around 250 to 42, or by roughly 83%.<sup>5</sup> PLC's average weekly attendance decline over the past 10-years has outpaced the LCMS decline of nearly 2.5% per year over the same period. Associated with the decline in attendance is a concern for the decline in offerings and income.

Some members feel there is an overemphasis on preserving church programs and building use for members and less on kingdom-centric ministry. PLC's leaders are responsible for aligning the church's offerings income and assets with ministry goals. The congregation has an average annual income over the last three years of nearly \$350,000 and a balance sheet of just over \$5.1 million.<sup>6</sup>

Scarce resource theory suggests PLC must choose ministry allocations which are viable according to the limits of their physical resources (financial, space, volunteers, staffing, etc.). This does not mean PLC does not live out a bold and courageous faith in promoting the Gospel of Jesus Christ. It simply means, using her God-given reason and common sense, PLC has been called to "live within her means" and to use her resources wisely. That would include how to deploy and maximize the gifts of the pastor, staff, ministry teams, volunteers, and use of the building and financial resources.

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<sup>5</sup> The average weekly attendance of 250 is used as the "best guess" of the current leaders of the PLC.

<sup>6</sup> \$500,000 in ministry funds; \$1 million in a parsonage fund; \$3.6 million conservatively in property valuation.

Having been on staff as IIP for several months, I am able to affirm there is confusion over boundaries and limits. Decision rights are not clearly delegated. Ministries are fragmented, functioning in “silos.” Leaders do not effectively leverage resources (ministry teams, human capital-volunteers and staff, budgets, etc.) in a complementary, collegial, and collaborative fashion. Ministry leaders are crowding the ball, jumping into other leader’s areas of perceived responsibility. Since everything appears to belong to everyone, nothing belongs to anyone. According to members, governance and staffing have become serious issues of concern over the last 10 to 15 years. Consequently, every decision becomes a tug-of-war (power struggle), or turf war. One member said there are “too many cooks in the kitchen.” The power struggles seem to be over sharing space, empowering staff, executing worship, and messaging and signage, to name a few.

The members of PLC are frustrated over how day-to-day ministry gets done. There is confusion over how ministries are aligned with a strategic ministry plan that is unifying and complementary. PLC is passionate about making a Gospel impact in the community but does not know how to make that impact. The frustration is realized on all fronts – lay leaders, lay members, and staff. Based on initial observations, a formal sharing of the day-to-day ministry duties and responsibilities with the pastor and staff appears to be difficult for PLC. It will be good to explore willingness in this area.

To be clear, PLC has been blessed with very gifted lay leaders and pastors who love the Lord and each other. They are working diligently—maybe too hard. Given PLC leaders’ dedication, they are prone to over-functioning and rescuing. These traits have become chronic and there is little room for a new settled pastor. In fact, informally there are already five pastors<sup>7</sup>

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<sup>7</sup> Three pastors from the LCMC-side of the congregation and three retired pastors who continue provide pastoral care and teaching at PLC, one of whom is the spiritual leader of the congregation. Three of these pastors are

who are directly or indirectly shepherding the ministries of PLC.

### Implementation

After receiving approval from the leadership of Palisades Lutheran Church to participate in the research project, all members were invited to meet with me for one-on-one interviews. These interviews allowed me to meet with as many members as were willing within the first two months of my joining (February 1, 2021, through April 1, 2021). The members had an opportunity to complete the one-on-one interview questions prior to attending (Appendix 3). Members were also encouraged to fill out an Emotional Thermostat to assess their level of anxiety related to the congregation's current state (Appendix 4) and complete an Organizational Flow Chart worksheet to ascertain how members believe ministry "things" get done at PLC (Appendix 5). I further took copious notes of how members verbally describe the reasons for their answers and anything else they would like to share during interviews.

PLC members were eager to participate in the interviews, but it took some encouragement to engage the members in completing the Emotional Thermostat and Organizational Flow Chart. I was able to meet with fifty-one individual members of the congregation. This is greater than the average weekly attendance of forty-two. These interviews assist to ascertain both qualitative and quantitative components of the project, helping assess the validity of the Gospel impact ratings.

Members expressed the following concerns when asked about the current and future state of PLC's mission in the Palisades Lutheran Church, and greater Los Angeles, area:

"There are too many churches in Pacific Palisades. There is competition in the Christian Market Place. PLC may have to merge with one of the other 3 evangelical churches and change

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also members.

its name to maybe “Palisades Community Church.”

“I have not heard much about change.”

“We have lost faith that the congregation can change and our call for changes will be ignored or rejected.”

“We need an actual plan.” “We have no Master Plan.”

“We need to figure out what we are supposed to do, religious values as members of the community, and as individuals.”

“Identify our mission in the community.”

“Be open to new ways of doing things.”

“There is much potential once a clear direction is taken, and everyone is on board.”

“We need a well thought out plan to attract visitors and children.”

“PLC needs to be relevant in today’s world.”

“The Pastor needs to provide thought leadership.”

“No defining cause for the past 50 years.” (Ministry just happened.)

“We are just a discombobulated bunch of separate individuals with different ideas and goals trying to keep afloat.”

“Pastor Short-term” wanted us to support (and we did) ‘Feed Our Starving Children.’”

Based on the one-on-one interviews, the members’ top ten concerns, the prioritization and average weekly attendance charts (Appendices 3, 6, 7, and 8), Constitution and By-laws, STAR Preschool Agreement, a “Synthesis of all Five Elders Small Groups”, an interview with the departed pastor, desired outcomes of the IIM Agreement, and annual financial statements, I wrote the 1<sup>st</sup> Quarter Report (Appendices 9 and 24). The 1<sup>st</sup> Quarter Report is intended to be a

resource for the members and stakeholders of Palisades Lutheran Church (PLC), the Pacific Southwest District (PSD)<sup>8</sup> of the Lutheran Church—Missouri Synod (LCMS), and the Lutheran Congregations in Mission for Christ (LCMC). It will be used by the Transition Task Force (TTF) as the primary resource document for leading the congregational self-study over the next six months. In fact, it is now a historical document of PLC. The report is divided into two sections: PLC’s Top 10 Concerns and Recommendations (Appendix 6).

Two town hall meetings (held online at – May 17 at 1pm and 7pm to enable members to find time in their schedules) allowed PLC members to reflect on the 1<sup>st</sup> Quarter Report and offer feedback.<sup>9</sup> More than thirty-five members attended the 1pm town hall and more than fifteen attended the 7pm town hall. Many members met with me individually, and many email conversations were held, to discuss the impressions of the 1<sup>st</sup> Quarter Report. The 1<sup>st</sup> Quarter Report and other feedback was helpful in defining the relationships of core ministries to each other, to individual members, and to the congregation as a whole. The feedback was also instrumental in assessing the results of the online survey.

### Identify Core Ministries

Also based on the one-on-one interviews; the Constitution, By-laws, and other governing and historical documents; STAR Preschool Agreement; Organizational Flow Chart; desired outcomes of the IIM Agreement; annual financial statements; and discussions with leadership, eight distinct ministries emerged as core ministries of PLC. The eight formal and informal core ministry activities that play a key role in PLC’s current state strategic ministry plan are found in

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<sup>8</sup> See Appendix 25 for Pacific Southwest District President’s 1<sup>st</sup> Quarter Report feedback.

<sup>9</sup> See Appendix 26 for Town Hall meeting Questions and Answers sheet. The members were invited to email any questions between the delivery of the 1<sup>st</sup> Quarter Report on May 7, 2021, and the Town Hall meetings on May 17 and May 20, 2021.

Appendix 11. Ministries that have no formal relationship with PLC (Revive LA and STAR Preschool) are included as core ministries of PLC because they operate out of PLC-owned buildings, have shared leaders and members with PLC, have shared history with PLC, and consume PLC time and energy (Appendices 9 and 24).

#### Assess Core Ministries for GIST Ministry Map

The next step was to invite PLC Church Council members and Elders, to participate in an online survey developed in Google Forms, called the “Gospel Impact Survey.” The Gospel Impact Survey was distributed via email on Sunday, March 14, 2021, to the members on PLC’s Church Council (eight members) and Elder Board (five members). Three Elders and four Council members responded, for a total of seven participants (16% of the average weekly attendance of 45). The online survey consisted of thirty-two questions in four parts: Gospel Impact Stewardship Tool Introduced; GIST Purpose; Description of How the Data Will be Analyzed and Interpreted; and Informed Consent/Assent Document (Appendix 12). (In completing the online survey, the participants consented to participate in the research study).<sup>10</sup>

Figure 4: Gospel Impact Survey Scores

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<sup>10</sup> The congregation as a whole formally consented to conducting the Major Applied Project during the IIM Agreement process.

**Assessing Gospel Impact**

On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.

Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	<i>Alignment with Core Mission</i>	<i>Excellence in Execution</i>	<i>Community Building</i>	<i>Leverage</i>	
PLC's Bible Studies	3.0	2.5	2.3	2.8	<b>2.7</b>
PLC's Elder Ministry	2.7	2.4	2.4	2.7	<b>2.6</b>
PLC's Worship Ministry	2.5	2.5	2.4	2.5	<b>2.5</b>
PLC's Outreach and Evangelism	2.7	2.2	2.5	2.5	<b>2.5</b>
Revive LA	2.6	2.0	2.5	2.7	<b>2.5</b>
PLC's Stewardship Ministry	1.8	1.9	1.6	1.6	<b>1.7</b>
PLC's Youth and Family Ministry	1.4	1.7	1.7	1.9	<b>1.7</b>
Star Preschool	1.3	1.8	1.7	1.8	<b>1.7</b>

The Gospel Impact Survey asked respondents to rate each of PLC's eight core ministries relative to each other by means of four criteria: alignment with core mission, excellence of execution, community building, and leverage (Appendices 12 and 21). The Council members and Elders rated each of these eight ministries on a scale of 1 to 4, with 4 being the highest (Appendices 13 and 14). The survey results were averaged and ranked highest to lowest (Appendix 15), and the results were used to create PLC's Gospel Impact Stewardship Tool (GIST) Ministry Map (Appendix 18).

#### Analyze Finances for GIST Map

Three meetings were held with PLC's finance committee (treasurer, financial secretary, and bookkeeper) to conduct a congregational financial viability analysis. The finance committee understood that the goal of the financial viability analysis was to encourage monitoring of ministries, promote intelligent and honest dialogue about congregational stewardship challenges, and motivate ministry leaders to collaborate on discovering effective solutions to stewardship problems.



The first meeting was scheduled for 90 minutes and was conducted on RingCentral powered by Zoom on May 7, 2021. The agenda for the meeting was: 1) introduce and review the stewardship theology concept, 2) review the five steps to conduct the GIST analysis, 3) task the committee to complete the revenue section for each of the ministries on the financial data sheet (Appendix 16), 4) discuss the “true cost”<sup>11</sup> of each ministry (Appendices 16 and 17), and 5) inform the committee that I (pastor) will track and provide the data for staff allocation of time to each ministry (Appendix 17).

The second meeting in July 2021 was brief, lasting for 30 minutes. The committee had researched (and now reported back on) what they learned about PLC’s approved budget. They were able to provide the total budget amount for the year but were unable to assign a definitive revenue amount to each ministry. They had attempted a number of formulas but were not convinced about how to allocate revenue amounts to the various ministries since most of the revenue came in the general offering plate on Sundays.

The third meeting was held on August 7, 2021 and lasted for ninety minutes. The finance committee agreed general offerings should be distributed as follows: one-third to PLC worship ministries and two-thirds divided equally among the remaining five approved ministries of the congregation. The bookkeeper had decided to use the staff’s time-allocation model to calculate shared expenses for the true cost analysis. The finance committee agreed to use the time-allocation percentages resulting from calculating true cost for employees for the remaining expenses less direct costs. The final data was entered onto the Stewardship Calculator – Staffing Plan (Appendix 17) and the Financial Analysis Data Table (Appendix 16). The results were used

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<sup>11</sup> The “true cost” of each ministry program includes direct expenses, shared expenses, administrative expenses, staff time, and volunteer time.

to create PLC’s Gospel Impact Stewardship Tool (GIST) Ministry Map (Appendix 18).

Figure 5: Financial Analysis for Palisades Lutheran Church, Pacific Palisades, California

**Gospel Impact and Stewardship Tool (GIST)** REV. MARILYN LEE, III

	Worship	Bible Study	Youth & Family	Outreach & Evangelism	Stewardship	Revive LA	STAR Preschool	Elder	Total
Revenue	\$ 126,541.22	\$ 43,866.79	\$ 27,086.80	\$ 27,086.80	\$ 62,563.59		\$ -	\$ 27,086.80	\$ 314,232.00
Direct Expense	44,604.00	2,500.00	2,500.00	2,500.00	-	7,500.00	10,768.00	2,500.00	72,872
Shared Costs	69,318.69	24,029.23	14,848.61	14,848.61	34,287.55	23,167.09	2,149.35	12,393.51	195,043
Administration	11,461.50	3,972.29	2,454.42	2,454.42	5,667.77	3,830.18	10,765.00	2,454.42	43,060
<b>Total Expenses</b>	<b>125,384</b>	<b>30,502</b>	<b>19,803</b>	<b>19,803</b>	<b>39,955</b>	<b>34,497</b>	<b>23,682</b>	<b>17,348</b>	<b>310,975</b>
<b>Surplus / (Deficit)</b>	<b>\$ 1,157</b>	<b>\$ 13,365</b>	<b>\$ 7,284</b>	<b>\$ 7,284</b>	<b>\$ 22,608</b>	<b>\$ (34,497)</b>	<b>\$ (23,682)</b>	<b>\$ 9,739</b>	<b>\$3,257</b>

**Notes:**

- In 2021 PLC has elected to subsidize two ministry as follows: Revive LA in the amount of \$34,497 and STAR Preschool in the amount of \$23,682.
- Revenue:** The amount of revenue allocated to each PLC-based ministry aligned with the amount of time each PLC staff member gave in support of that ministry.
- Direct Expenses:** Actual expenses incurred solely by this particular ministry or program or activity; including: labor, rental terms, etc.
- Shared Costs:** The amount of revenue allocated to each PLC-based ministry aligned with the amount of time each PLC staff member gave in support of that ministry.
- Administration Costs ("Overhead"):** 25% of Overhead Expenses were allocated to STAR Preschool (in addition to Utility expenses). Rationale: Occupancy is five (5) days per week and 100% of office space available to STAR Preschool at all times. 75% of other overhead expenses allocated to the six PLC-based ministries and Revive LA.

### Create GIST Ministry Map

Values from the Gospel Impact Survey and the Financial Analysis Data Table were then plotted on the GIST map. Ministries with higher Gospel impact scores assigned by leaders in the Gospel Impact Survey are plotted higher on the “Y” axis. Ministries supported by greater funding are plotted further toward the right on the “X” axis. The axes divide the Ministry Map into four quadrants: “The Star: High Gospel Impact, High Financial Viability,” “The Stop Sign: Low Gospel Impact, Low Financial Viability,” “The Heart: High Gospel Impact, Low Financial Viability,” and “The Money Tree: Low Gospel Impact, High Financial Viability”<sup>12</sup> (Appendix 2). The larger the bubble shown on the GIST Ministry Map, the greater the expense of the ministry

<sup>12</sup> Bell, et al., *Nonprofit Sustainability*, 75–95.

to PLC.

Depending on where a ministry is placed on the map, a strategic imperative emerges: the Star quadrant, invest and grow; the Heart quadrant, keep and contain costs; the Stop Sign quadrant, close or give away; the Money Tree quadrant, water and harvest, increase Gospel impact (Appendix 2). A ministry that falls into the Heart Quadrant, for example, initiates the “keep and contain costs” imperative. These implied choices are then imported into the Gospel Imperative Decision Table. Beyond helping leaders understand their ministries’ effectiveness, the GIST Ministry Map can help congregational leaders strengthen them.

#### Evaluate GIST Tool

The leaders were asked to respond to the GIST Leader’s Evaluation Survey to give their impressions of what strategic decisions PLC may make. The GIST Leader’s Evaluation Survey consists of ten questions: two theological, three organizational, three relational, and two programmatic. The GIST Leader’s Evaluation Survey questions may be found in Appendix 20. The GIST Leader’s Evaluation Survey was distributed on August 10, 2021, and 10 leaders responded. In conjunction with the survey was an introduction letter and the same consent form used for the first survey (Appendix 12). The leaders’ ability to test the GIST tool in evaluating core ministries is important in assessing the usefulness of the tool for application at PLC and other LCMS ministries.

#### Strategic Decision-Making

Final decisions will be made by PLC voting members after the congregational self-study, led by the Transitions Task Force (TTF). After one month of training, the TTF will host three months of cottage meetings on three different topics. Because PLC is a small congregation, the TTF consists of only nine members as a cross-section of the congregation, divided into three

teams of three. Each team will take a topic to study for a month. Then, after all teams have conducted their study, the “TTF Final Report with Recommendations” will be published to the members of the congregation. Then a townhall meeting will be held to discuss the implications of accepting the TTF’s recommendations. Following the townhall meeting, there will be a voter’s assembly to vote on which of the TTF recommendations will be approved. The TTF recommendations may include decisions on the Gospel Imperative Decision Table, or a separate vote may be held after the TTF recommendations are voted on and implemented. (See Figure 9, IIM Process Map, page 24.) The “TTF Final Report with Recommendations” will provide guidance and recommendations to the congregation on how to heal and move forward in truth and Christian love.

#### Evaluate Research

The research data will be evaluated based on how well the congregational leaders are able to identify core ministries, select the four criteria on which each ministry will be scored, provide a relative score for each ministry, and how helpful the visual map was in making strategic decisions pertaining to each ministry. The project will then conclude with introducing the Gospel Impact and Stewardship Tool (GIST) Matrix Map an assessment of its usefulness at Palisades Lutheran Church, and a recommendation about its usefulness for other LCMS congregations and church workers.

#### Methodological Approach

This research project uses action research,<sup>13</sup> wherein the researcher enters the system to

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<sup>13</sup> In this approach the role of the researcher is to stand with the community or group, not outside as an objective observer (Mark Rockenbach, PRA695A Research and Writing Course, Concordia Seminary, Handout 2, 3).

learn about the organization’s culture, relationships, organizational structure, and emotional field. The researcher is careful to learn about the system while maintaining a research posture to avoid emotional fusion. Action research includes the members of the congregation in the data gathering, self-reflecting, diagnosing, feedback and planning process. The IIM process is ideal for an action research project because it is designed to include the congregation in self-study and transformational change. The IIM self-study helps congregations become more self-aware and self-defined to know how better to align with future settled pastors and the demographics of their ministry context.

Intentional Interim Ministry (IIM) is provided for “the unique time between pastors both to repair from past experiences and to prepare for the future.”<sup>14</sup> Along with seasoned pastoral care and sound theological practice, IIM includes perspectives that are derived from systems thinking.<sup>15</sup> As an Intentional Interim Pastor (IIP) with a background and specialty in finance, my IIM assignments benefit from perspectives derived also from organizational learning and stewardship. It is my task to assist the congregation, between settled pastors, to identify and prioritize key concerns, to develop a strategic ministry plan, and to aid in pastoral call readiness.

Congregations cannot do everything with finite resources. This means they have to choose. The GIST tool endeavors to assist congregations make the hard strategic ministry decisions to best align resources for Gospel impact and financial viability. A good time to make these decisions is while the system is unfrozen, between settled pastors. In “*A Change of Pastors*” by Loren B. Mead (an Episcopal priest) he describes the time between pastors as one of the most important times in a congregation’s life. Many clergy transitions are written about from the

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<sup>14</sup> “The unique time between pastors” is a term of art quoted from the Intentional Interim Ministry Agreement.

<sup>15</sup> Intentional Interim Ministry Agreement.

clergy's perspective: what it's like to move to a new part of the country, the challenges a pastor's family will face when uprooting and transitioning among new people in a strange land. Mead, however, writes from the perspective of the members and gives members guidance to take advantage of this time. Mead calls the transitional time between settled pastors a pregnant moment, where change toward either healthy or unhealthy change will occur. He writes: "We discovered that when the congregation went through a change of the leading clergyperson, there was an extraordinarily pregnant moment at which change could happen...it would happen, powerfully, no matter what – and that could go either toward health or toward dysfunction."<sup>16</sup> Using the GIST tool may help PLC effectively use this transitional time towards healthful transformational change toward present vitality and future sustainability.

This research project also uses mixed research methodology, incorporating both qualitative and quantitative components, to gather data for the GIST tool and map. PLC agreed to participate in the research project and the IIM process tasks, including the IIM five developmental tasks (Appendix 1), the congregational self-study, and the qualitative and quantitative analyses. Names are changed in this research paper to preserve the anonymity of the individuals studied. All other facts are retained as they occur throughout the project.

### Research Methodology

This research project incorporates action research and mixed research methodology, using both quantitative and qualitative analysis, to create a visual map of PLC's current ministry state. The GIST congregational stewardship tool assesses the impact and viability of all the human and material resources a congregation has received on a dual bottom-line. The goal is for the GIST

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<sup>16</sup> Loren Mead, *A Change of Pastors*, Chapter 1.

Ministry Map to provide sudden clarity on how the congregation's different ministry activities interrelate.

Most tools used in my research include both types of methodology: qualitative and quantitative. Some of the many tools include interviews, church board meetings, GIST Leader's Evaluation Survey, 1<sup>st</sup> Quarter Report, a townhall meeting to provide feedback to the 1<sup>st</sup> Quarter Report, Organizational Chart activity, Gospel Impact Survey, Emotional Thermostat, governing and historical documents, and financial data.<sup>17</sup> Example qualitative data include interviews, the Emotional Thermostat, and the Gospel Impact Survey. Example quantitative data include average weekly attendance numbers and financial data. All research tools may be found in the Appendices.

### Gospel Impact Methodology

Assigning values to the Gospel Impact Survey Results Scored chart found in Appendix 15 requires criteria by which to determine Gospel impact. The authors in *Nonprofit Sustainability* recommend selecting four criteria to evaluate programmatic impact. For purposes of this project, the Top 10 Concerns of members addressed in the 1<sup>st</sup> Quarter Report lined up closely with the criteria *alignment with core mission, excellence of execution, community building, and leverage* found in Appendices 12 and 21 and described in greater detail in Chapter Two. Different criteria may be chosen, if the GIST tool is to be used in other congregations, which better reflect the values and goals of those congregations.

Gospel impact criteria are subjective, as perceived by the leaders of the congregation when completing the Gospel Impact Survey. The results are also relative, as compared with other core

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<sup>17</sup> See Appendices.

ministries of PLC. While appearing to have quantitative “scores,” the Gospel Impact Survey ratings are qualitative and provide a way to compare individual ministries of the congregation with one another and with the overall mission and Vision of the church. The Council members and Elders were informed this process is not about deciding which ministry programs are good and which are bad. It is about acknowledging, and collectively thinking through, which ministry programs have relatively more perceived Gospel impact than others. Therefore, ministry programs cannot all be at the low end or high end of the impact spectrum in the answers to an individual’s Gospel Impact Survey.

#### Financial Data Methodology

*Nonprofit Sustainability* authors note, “Organizational leaders will want to know which of a nonprofit’s activities made money, which lost money, and which broke even.”<sup>18</sup> The finance committee and I had struggled with how to allocate revenue and expenses across all core ministries when preparing for this step in the research project.

On Friday, March 19, 2021, I wrote the following email to Steven Zimmerman, author of *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*:

Dear Steven,

Greetings. Your books: "Nonprofit Sustainability: Making Strategic Decisions for Financial Viability" and "The Sustainability Mindset" have been instrumental in the work I do with non-profits, particularly churches. I am a Lutheran Pastor with special training in finance. I work with Lutheran congregations, schools, and non-profits across the country in the area of stewardship. I am also completing a Doctor of Ministry degree in Organizational Theory at Concordia Seminary, St. Louis, MO. I am hoping to get your advice on how to allocate weekly church offerings and volunteer time. I am very interested in assisting churches to better understand financial performance at the ministry program level. The congregational boards and staff would benefit from understanding the cost of delivering each ministry program. The challenge of course is that much of the revenue (income) comes

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<sup>18</sup> Bell, et al., *Nonprofit Sustainability*, 30.



through weekly offerings and is not given directly to each individual ministry - other than, perhaps, as approved in the annual budget. Giving may increase or decrease as the finance committees report out to the members weekly/quarterly financials, but the relationship between offerings and individual ministry costs is unclear. Any guidance you might offer from using the Matrix Map with religious nonprofits would be greatly appreciated. Many thanks.

Warm regards,

Rev. Martin E. Lee, IIP  
Intentional Interim Pastor

On Monday, March 29, 2021, I received the following reply:

Reverend,

Thank you so much for your email and for your kind words. It is so rewarding to hear about the various ways the book has had an impact and how it is being used in practice. You raise a couple of good questions and I wish I had a specific answer to give you. As I read what you wrote, I related it to a membership model – where members pay dues and, in return, have access to a series of programs or offerings from an organization. The revenue from the dues is not typically allocated out to the individual offerings. In this case, I would envision a program for the weekly offerings which would bear the relatively small expense of gathering the money and show a surplus in the end of money generated. There would also be a series of programs for the various individual ministries which would all operate at a subsidy. In these cases, the *relative* impact of each of the individual ministries becomes important. As you are completing the mission impact assessment, we really focus on each of the criteria and ask, “Relative to other programs, how does this program . . .” The completed map would then show the big picture financial relationship of how the weekly gatherings subsidize the ministries and the relative assessment ensures that the highest impact ministries should get funded first. It is a bit messy but allows for a robust discussion.

As for volunteer time, we do not typically capture that on the matrix map, unless there is someone who is coordinating the volunteers and making sure that it happens. That said, if most of the efforts are volunteer, there can be ways to allocate an arbitrary amount to each program based on the amount of effort that they take to conduct. The key when I have seen this applied is to make sure you look at all the programs together and then allocate an amount (say a total of \$100,000) between all the programs based on which require more effort than others.

I hope this helps somewhat. Please let me know if you’d like to discuss more. Again, thank you for your email!

Steven D. Zimmerman

The finance committee agreed that one-third of general offerings should be allocated to PLC worship ministries and two-thirds of general offerings should be divided equally among the five remaining ministries. The finance committee also agreed that any major gifts received from general offerings during the year were to be smoothed into the spending plan from that point forward. The finance committee agreed funds designated to a specific ministry would be credited as revenue to that specific ministry fund in the given year.

Data was gathered to assess the “true cost” of each ministry activity, including staff and volunteer time. In determining the true cost of each ministry (Appendices 16 and 17), the finance committee was tasked to calculate the combination of all costs related to the particular ministry, including (but not limited to) staff time, volunteer time, shared costs, direct costs, and administration costs.<sup>19</sup> The goal was for PLC’s finance committee to agree on, for internal use only,<sup>20</sup> a formula for calculating shared expenses. Shared ministry expenses (common costs) do not relate to any one ministry but are shared among multiple ministries; for instance, the pastor, church secretary, musician, utilities, and mortgages.<sup>21</sup> This entailed allocating income and expenses of each core ministry, including staff salaries.

The bookkeeper concluded, after pouring over the numbers, the only model that made sense to share the value of staff salaries was to follow the staff’s time allocation and use the same percentages to calculate revenue shared and administration costs (expenses). Since two of the

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<sup>19</sup> For purposes of the ministry map true cost is the allocation of actual costs to each ministry where these costs are borne.

<sup>20</sup> Not intended for public financial reporting or statements.

<sup>21</sup> To help account and monitor these time allocations the Brown University job description template provides a place to allocate percent of time spent on each core ministry. See the Church Secretary position description I developed for Yolanda.

core ministries (Revive LA and STAR Preschool) are not part of the approved spending plan (budget) they do not receive any credit for revenue out of the offerings, but any identified time the staff reports is allocated to those ministries as a shared expense. The following is the formula used to calculate a ministry's true cost: Total Hours allocated to a ministry *divided* by Total Employee Time *multiplied* by Total Cost of employee *equals* "True Cost." The finance committee agreed to use the same time-allocation percentages resulting from calculating true cost for employees for the remaining expenses less direct costs.

To understand even further the true cost of each ministry, PLC could quantify the volunteer hours associated with each core ministry represented on the GIST Ministry Map. The authors of *Nonprofit Sustainability* note, "Similar to in-kind expenses, if it weren't for the generous time of volunteers, many nonprofit organizations wouldn't be able to survive, yet alone thrive."<sup>22</sup> Each ministry may be supported by hundreds of volunteer hours each year. At this time the finance committee elected not to calculate volunteer time.

### Assumptions, Role of Researcher and Limitations

#### **Assumptions**

Ministry leaders have ample access to resources about tithing time, talent, and treasures on an *individual* basis (i.e., as a pastor, teacher, or church member). These resources also detail how best these individuals may give to support ministry endeavors. This research study assumes a general understanding of individual stewardship practices and instead concentrates on *congregational* stewardship practice.

Similarly, LCMS ministry leaders have ample access to resources about spiritual and

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<sup>22</sup> Steve Zimmerman and Jeanne Bell, *The Sustainability Mindset: Using the Matrix Map to Make Strategic Decisions* (San Francisco: Jossey-Bass, 2015), 109.

emotional well-being and it is assumed they are engaged in daily prayer and devotion. Consequently, I did not attempt to analyze the spiritual condition of the congregation or leaders in my study. That is, I did not assess ministry leaders' church attendance, Bible study participation, or devotional and prayer life, but assumed a basic minimum standard in these areas.

### **Role of Researcher**

Understanding that the presence of the researcher in the system is enough to influence the system, the role of the researcher in action research is to actively engage the subject of the research and move toward transformational change. The researcher becomes part of the system, using a “spiral of steps, each of which is composed of a circle of planning, action and fact-finding about the result of the action.”<sup>23</sup> Similarly, as an IIM pastor, trained in “adaptive leadership skills, tools, and techniques” to encourage healthful change within a system, I entered the system at PLC for this research project. I used a series of tools in a spiral of steps to gauge the current state of the organizational system at PLC and encourage movement toward PLC's future state goals. Ultimately, however, maintaining a neutral, research posture was crucial to the success of the project, avoiding becoming fused in the system and of no clinical use.

Through participating with PLC in this action research project, I experienced numerous stewardship conversations on topics such as church governance, staffing configuration, and finance. Often congregations struggle in balancing how best to steward the human and capital resources God has given (as He generously gives to all ministries) to reach local communities. To have these conversations required me to provide attentive pastoral care and encouragement of

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<sup>23</sup> “Action Research,” Wikipedia, accessed October 30, 2021, [https://en.wikipedia.org/wiki/Action\\_research](https://en.wikipedia.org/wiki/Action_research).

each leader and their assigned ministry's value and worth. During the process it was important for me to be aware of various leaders' discomfort in discussing the specifics of the various ministries, particularly the ones they are stewarding. As both pastor and researcher, I reminded participants this activity was another way to view their particular ministry in relation to the others and look for what is working, what is not working, and what might be improved. I assured the participants this activity would not be used to criticize any ministries or the leaders of those ministries.

It was necessary for me to grow comfortable with being honest about how the leaders scored each ministry and challenge leaders to discuss what the scores and "true costs" of the various ministries might mean. Ultimately, I had to be comfortable with uncomfortable stewardship conversations about ways to improve stewarding God's mission, God's people, and God's things. My challenge in the project was to suspend my personal and professional opinions, based on experience with stewardship practices in local churches and schools. I had to seek a balance, being open to new learning, allowing for greater dialogue and contributions from PLC members related to their specific experiences and goals.

## **Limitations**

Research in developing the GIST Ministry Map was robust in that multiple and varied methods and tools were used to assess PLC's current state for the eight core ministries (Appendices 2–17). However, the Gospel Impact Survey included only seven participants to assess the relative Gospel impact of the core ministries for plotting on the GIST Ministry Map. This sample size would have been insufficient had the other supporting sources not been used to confirm the survey findings. The survey sample size would also have been insufficient to assess ministries of a larger congregation. Since PLC only worships an average of 45 people weekly, a

sample size of 7 is 16%.

Another limitation of the research methodology is assessing Gospel impact *at all*. Prior to distributing the Gospel Impact Survey and the final GIST Ministry Map, it may have been helpful to provide a better explanation to the PLC leaders regarding the concept of relativity. For example, the “Y” axis on the GIST ministry map illustrates Gospel impact for each ministry *relative* to the other ministries in the survey. It is not an actual measurement of Gospel impact (which we leave to the Holy Spirit). The same applies to the financial data plotted on the “X” axis. First, the financial data is not actual financials but the totality of the approved spending plan (proposed budget) and the combination of projected direct costs, shared costs, and administration costs. The financial data, then, is a cost-benefit analysis of each ministry in relation to the other ministries at PLC.

PLC’s leaders were to be given the opportunity to rate their trial experience using the GIST tool and GIST Ministry Map for assessing stewardship knowledge and practice. Instead, the questions in the final GIST Leader’s Evaluation Survey pertained mainly to assessing PLC’s core ministries and only indirectly pertained to their impressions of the trial experience with the GIST tool and GIST Ministry Map.

The most significant limitation of this research project involves testing and evaluating the GIST Ministry Map for its usefulness in improving strategic decision-making towards aligning ministry efforts. The GIST Ministry Map was designed to assist congregations make the hard strategic ministry decisions to best align resources for Gospel impact and financial viability. The dynamic self-study and implementation phases are not yet complete to properly test or evaluate the GIST tool for its usefulness in making those hard decisions. The “Action” column of the Gospel Imperative Decision Table remains TBD, or to be determined, as the decisions are yet to

be made. Based on the GIST findings, the congregation has agreed to the self-study process to explore further the implications. A task force has been created of nine members to lead the congregational self-study.

The Gospel Impact and Stewardship Tool (GIST) is customized to plot core ministries (no matter the size) into a collective image on a single sheet of paper. With a new view of each ministry in relation to one another and the dual bottom line, hopefully leaders are able to see and discuss these ministries in a more robust way. As Steve Zimmermann notes in his email, “It is a bit messy, but allows for robust discussion.”<sup>24</sup> With a clearer idea of each ministry’s Gospel impact and financial viability, leaders can more readily make those difficult stewardship decisions in order to be faithful participants in the economy of God.

Further research could possibly make the process a little bit less messy. For example, a longer-term study could give more data on the Gospel imperative decision-making process and how best to lead a congregation through these tough decisions. Using the GIST tool in a larger, more complex ministry setting would give more data on the scope and reach of the tool. The GIST tool may be used to analyze possible mergers of congregations and new staff hires.<sup>25</sup> Also,

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<sup>24</sup> Steve Zimmerman, Author of *The Sustainability Mindset*, March 29, 2021.

<sup>25</sup> I have been asked to evaluate a proposed ministry merger-partnership of three congregations and one university ministry. I will be using The Gospel Impact and Stewardship Tool (GIST) to assist in the impact analysis. The seven congregations being considered, for the analysis located on the westside of Los Angeles in what is referred to as the “Coastal Communities” or “Ocean Cities” are: Palisades Lutheran Church (PLC); Pilgrim Lutheran Church, Santa Monica (PSM); First Lutheran Church of Venice (FLV); First Lutheran, Culver City; Our Savior Westchester Churches, Manhattan Beach; Palos Verdes; and LA University Ministry. The GIST is able to provide a visual map for each of the individual congregations to then create an overall picture of where the efficiencies or dilution of efforts may exist. In the book “Nonprofit Sustainability: Making Strategic Decisions for Financial Viability” under the sections “Analyzing New Opportunities” and Using the Matrix Map to Analyze a Possible Merger” the authors discussion using the mapping tool for conducting impact analysis in considering a significant restructure. They comment, “The decision about whether to merge is multifaceted and involves not only finances and program similarity but also organizational culture and governance” (p. 123). He adds, “As discussions of a possible merger begin, it is helpful if both organizations have a solid understanding of themselves. Creating a Matrix Map is a good way to give a visual demonstration of the activities in which the organization engages and how they interrelate” (p. 123). Strategic decisions will need to be made, such as, which core activities would be combined? How will each congregation’s other core ministries be impacted? Will there be efficiency savings? What will the impact be on each congregation’s current governance models and staffing configuration?

a better assessment process could gather more feedback from leaders as to what worked and what didn't work.



## CHAPTER FIVE

### PRESENTATION AND EVALUATION OF THE DATA

The GIST Ministry Map<sup>1</sup> consists of several markings: the “X” and “Y” axis, the circles, and four “Gospel Imperative” quadrants. The “Y” axis (vertical) plots the results of the leader’s “Gospel Impact Survey” with the score identified in the center of each circle. The higher up or lower down the “Y” axis reflects the leader’s perception of relative Gospel Impact. The “X” axis (horizontal) plots PLC’s financial data, net revenue, provided by the finance committee. Those activities further to the left are less sustainable than those further to the right, while PLC’s “Worship” ministry is plotted in the center suggesting a break-even ministry. Not all ministries will operate at a surplus and not all at deficient, but some have to operate at a surplus to fund the ones operating at a deficit.

The size of the bubbles on the GIST Ministry Map depicts how expensive each of the measured ministries are, reflecting the biggest expense to the congregation: labor costs. Most of the cost represented by the size of the bubbles is how much time the pastor spends on each ministry as a percentage of his overall labor cost to PLC. Consequently, the worship service is the biggest bubble, with stewardship ministry a distant second. Another significant cost is use of space. The bubble size is different from the position of the bubble on the “X” axis, because an expensive ministry with a large bubble may have its costs covered by sufficient revenue, while a ministry to the left of the “Y” axis does not bring in revenue sufficient to cover its costs.

Authors Bell, et al., note, “When this step is completed, the Matrix Map not only allows you to see how each activity is contributing to your programmatic and financial sustainability but also allows managers and the board to see the degree to which resources are coming from and

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<sup>1</sup> See Figure 1.

going to various business lines.”<sup>2</sup> Now a picture of PLC’s current strategic ministry plan emerges. Depending on which of the four quadrants a ministry is plotted (Star, Heart, Money Tree, or Stop) will assist the congregation in evaluating how to proceed with the current ministry model. New discussions about what adjustments to make depend on how ministries are prioritized to accomplish the congregation’s mission and Vision.

Combining PLC’s six formal ministries with its two informal ministries gives an average overall score on the Gospel Impact Survey of 2.2. Plotted on the visual map, PLC leaders are able to picture how ministry efforts at PLC are average. Individually, PLC members are clearly gifted and active, but their collective ministry efforts result in less than the sum of their parts.<sup>3</sup> Based on the results of the GIST Ministry Map, PLC leaders believe they can do better with their invitation to partner with God in His mission in the world.

### **Evaluation of Data**

The results of the Gospel Impact Survey plotted on the GIST Ministry Map reveal that no core ministry received a high score (Appendix 15). Nor are any ministries plotted solidly in the “Star” or “Heart” quadrants. The six formal PLC ministries are all grouped around the “Money Tree” quadrant, meaning they are receiving funding but there is little satisfying Gospel impact as reported by PLC’s own leaders. The leaders were surprised they scored four of the six formal PLC ministries as nearly average, with two below average. On a scale of 1–4, with 4 being the highest, they rated themselves on average 2.6 in Gospel impact.

Bible study rated the highest, with a score of 2.7 in the Gospel Impact Survey. Bible study

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<sup>2</sup> Bell, et al., *Nonprofit Sustainability*, 60.

<sup>3</sup> Just as organizations can know more than the individuals who make up the organization, “In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do.” (Argyris and Schön, *Organizational Learning*, 5.)

has a small 1.0-point lead over the Elder ministry and 2.0 point lead over Worship and Outreach. While there is no clear flagship ministry to rally spirits and resources around, feeling significant mission is being accomplished, Bible study is possibly in the “Star” quadrant. As a counterweight, however, PLC has a very low Sunday morning Bible Study attendance. Members disperse among several midweek Bible studies, reflecting the church’s tendency to fragment both in fellowship and doctrine. Many of the Gospel Impact Survey respondents are either current or former Bible study teachers. These leaders naturally rate themselves as above average in Bible study. When including cost to the congregation, there is one clear loser: stewardship ministry.

The two informal PLC ministries (STAR Preschool and Revive LA) scored the lowest on the financial analysis and, consequently, on the visual map. The PLC leaders (which include two Revive LA pastors) gave Revive LA a score of 2.5 and STAR Preschool a score of 1.7 in the Gospel Impact Survey. What causes STAR Preschool and Revive LA to stand out from the other ministries is their cost to PLC without adding significant benefit to PLC’s Gospel impact.

STAR Preschool was plotted solidly in the “Stop Sign” quadrant of the visual map, meaning it has very little Gospel impact (alignment with PLC’s Vision for ministry, excellence in execution, leverage, and community building) and very little financial benefit. STAR Preschool is operating at a financial deficit according to both actual and true cost analysis. Revive LA is between the “Heart” and “Stop Sign” quadrants, meaning the leaders are conflicted over this ministry’s alignment with the PLC vision for Gospel impact, and is certainly not helping PLC financially. Revive LA operates at a deficit when considering true cost.

A concern raised from the GIST Ministry Map is what the ministry relationship between Revive LA and PLC shall look like going forward. Is Revive LA a “daughter” ministry or “partnership” ministry of PLC? What duties does PLC have to Revive LA? Based on Revive

LA's plotting on the GIST Ministry Map, it falls on the edge of the "Stop Sign" quadrant, with a strategic imperative of close or give away. Revive LA's leadership is quite concerned about being placed in this quadrant given the possible implications.

In fact, this leader was so upset they communicated such over a group email to the PLC Council and Elders saying:

Dear Pastor Lee,

Is the chart below preliminary and the breakdown to discuss? Revive LA uses the facility about 4 hours on Sunday. The chart does not account for Revive LA giving nor the professional work we provide for "PLC" especially for last year. Thank you pastor and I fully understand the explanations & really appreciate it. This still seems subjective at this stage but according to the numbers & the charts, "PLC's" position is:

**Revive LA:**

- Costs "PLC" \$3,075.25 a month for 4 hours use of space including storage
- Provides no income to "PLC"
- On a scale from 1 to 4 on Gospel Impact, **"PLC" leaders believe we provide minimal Gospel Impact rating a 2.5.**
- Nobody from Revive LA does any work for "PLC" and Revive LA does not incur any costs?

Is this the "PLC" position?

Sincerely,

Stewardship Committee Chair and Senior Pastor of Revive LA

Reply:

Hey "Chair and Senior Pastor of "Revive LA,"

Patience. A robust conversation is coming in soon and regarding all the ministries. Revive LA scored right at the top of the scoring for all "PLC" ministries. Right now, we are simply gathering data and input from many pockets of "PLC." What it all means to you and the congregational members and how you move forward in ministry together and call your next pastor is yet to be discussed. God has an incredible plan. Continue to trust Him as I know you do. It will be awesome to see what He has in store for you all.

Pastor Lee

Leader's reply:

Working on the patience part – (smiley face).

### **Data Analyses**

The results of the GIST Ministry Map are even more effective in illustrating the current state of PLC's ministries than anticipated. PLC's GIST Ministry Map reveals a pattern that explains the effect of PLC's multiple, fragmented, and often competing ministries (Appendix 18). I had anticipated all the core ministries to have different levels of relative Gospel impact. But, despite PLC's high levels of participation and community engagement in a heavily populated ministry context, the GIST Ministry Map shows PLC's eight core ministries gain little movement from the map axes. The most reasonable explanation is that PLC's competing doctrinal positions and ministry efforts cancel each other out. At minimum, the GIST Ministry Map shows PLC's eight core ministries are unable to gain any real traction, possibly due to an inability to define their spiritual identity and their mission and Vision in the community.

The stalemate between competing ministry efforts that is particularly apparent in day-to-day ministry but not explicitly depicted on the GIST Ministry Map pertains to PLC's pastors and the dual denominational affiliation. LCMC doctrine states, "all the people are ministers of the church called to proclaim the good news of Jesus Christ."<sup>4</sup> A template bulletin at PLC reflects this doctrinal position; and the doctrine is applied in practice at PLC. Since everyone is a pastor, no one is. Some members hold that, "Theological degrees are preferred,"<sup>5</sup> while others prefer being led by the "Spirit." Those who are ordained and called pastors to PLC contradict one

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<sup>4</sup> "A View of the LCMC from an LCMS Pastor," The Brothers of John the Steadfast, accessed October 30, 2021, <https://steadfastlutherans.org/2010/08/a-view-of-the-lcmc-from-an-lcms-pastor-by-rev-joshua-v-scheer/>.

<sup>5</sup> GIST Leader's Evaluation Survey response.

another doctrinally. Pastor Short-term said “Pastor Longest-term would teach the opposite of what I taught.”<sup>6</sup>

The research data was evaluated based on how well the congregational leaders were able to identify core ministry activities and how they work together to accomplish PLC’s mission. Identifying core ministry activities sounds at first blush like a very low bar. Every local church and school ministry should be able to describe what they are doing.<sup>7</sup> Considering that PLC is a small, family-sized church, the number and type of core ministry activities should be easily identifiable. On the one hand, listing the core ministry activities was easy; on the other hand, deciding which ministry activities are attributable to PLC as ministries and how to categorize them was not. The GIST tool was helpful in prompting the conversation and in clarifying the ministry relationships. Through the process of identifying PLC’s core ministry activities, PLC leaders were given opportunities to learn about organizational stewardship concepts, like how each ministry should be aligned with PLC’s overall Vision for ministry.

The research data was additionally to be evaluated based on how well the congregational leaders were able to select the four criteria on which each ministry would be scored and provide a relative score for each ministry. The criteria were chosen, instead, based on the “Top 10 Concerns” results identified during the one-on-one interviews and described in detail in the 1<sup>st</sup> Quarter Report (Appendix 24). The leaders were able to use the criteria effectively, without asking additional clarification, and their responses to the Gospel Impact Survey questions reflected responses in the one-on-one interviews and other sources.

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<sup>6</sup> Interview notes see Appendices pages 210–213, date March 2021 and July 2021.

<sup>7</sup> As W. Edwards Deming (Engineer, Statistician, MIT Lecturer) famously said, “If you can’t describe what you are doing as a process, you don’t know what you are doing.” (“Demings 14 Principles of Total Quality Management,” Effective Leadership Management 101, accessed October 30, 2021, <https://effectiveleadershipandmanagement101.blogspot.com/2012/05/demings-14-key-principles-of-total.html>.)

The research data was further to be evaluated based on how helpful the GIST Ministry Map was in making strategic decisions pertaining to each ministry. The GIST Leader's Evaluation Survey was distributed to the PLC Council, Elders, and the Transition Task Force leaders, and ten responded to the survey. Responses to the GIST Leader's Evaluation Survey are a sample of the decisions to be made by the PLC voting body. Having the leaders weigh in on how they feel about the strategic ministry options shows that making the difficult strategic decisions is possible for PLC and that the GIST tool is useful in helping make those decisions toward better alignment of ministry efforts. The responses to the GIST Leader's Evaluation Survey also demonstrated that PLC's leaders had gained knowledge of congregational stewardship practices and how best to apply the learning at PLC. Finally, the congregational leaders were to be given the opportunity to rate their trial experience using the GIST Ministry Map for assessing congregational stewardship knowledge and practice. However, the questions in the final GIST Leader's Evaluation Survey pertained mainly to assessing PLC's core ministries but gauged their impressions of the trial experience with the GIST tool and GIST Ministry Map indirectly.

The GIST Ministry Map assists PLC leaders see both strengths and weaknesses in their current strategic ministry plan. The current ministry state is a misalignment of resources, goals, and core values. PLC and Revive LA pastors, worship services, and ministry and outreach goals are not aligned. PLC and Revive LA are two separate entities with different staffing models, governance structures, budgets, and funding strategies. Revive LA specializes in reaching young people, unchurched people, and the recovery community. PLC specializes in serving the traditional music and higher education communities. Both ministries are interested in the arts but are in conflict about style.

The GIST Ministry Map assisted both PLC and Revive LA leaders to affirm each other's

Vision of God's mission while, at the same time, recognize their Vision for ministry may not be the same. Since Revive LA is only informally a core ministry of PLC, this misalignment may be acceptable, depending on how PLC meets its Gospel imperatives. Partnering in ministry may not be the goal in this case but partnering in making congregational stewardship decisions may still be possible.

The GIST Ministry Map shows that PLC and Revive LA may need each other, since the Map shows Revive LA, which specializes in ministry to young people, operating at a deficit according to the true cost, and PLC Family and Youth Ministry scoring at 1.7 in Gospel impact. The two ministries can see clearly that collaboration and dialogue could help to improve each other's ministry in a concerted and integrated manner. One of the rating criteria in the Gospel Impact Survey was community building: how well does a particular ministry build community inside and outside the church? Another rating criteria was leverage: how well does a ministry create opportunities for other ministry efforts? The better a ministry complements and promotes other ministries the better it scores in the GIST survey.

The GIST map does not show a similar complementary relationship between any PLC ministry and STAR Preschool. STAR Preschool is ranked solidly in the "Stop Sign" quadrant, necessitating either increased financial benefits from the relationship with STAR Preschool or better alignment with PLC's ministry goals. A more formal effort of integration is needed between PLC and both STAR Preschool and Revive LA, but particularly between PLC and STAR Preschool. Leaders also recognize the pastor's time could be more concentrated in the ministries where growth is hoped.

Those involved in the system may interpret the GIST Ministry Map results differently. For example, when the question was asked in the GIST Leader's Evaluation Survey, "Is it possible



ministry efforts are unintentionally working at cross-purposes and out of alignment?” one leader replied, “Possibly. But Pastor Long-term made it work successfully for many years.” The results of the GIST Ministry Map show that the multiple ministry efforts are not *currently* working successfully toward alignment with PLC’s goals for ministry. Additionally, attendance records and one-on-one interviews reveal that PLC ministries have been in decline and conflict since PLC’s inception in 1970. Most GIST Leader’s Evaluation Survey respondents agreed that PLC’s ministry misalignment is “obviously hindering PLC’s Gospel impact.” One respondent said, “the relationship [between the ministries] remains superficial.”

The GIST Ministry Map provides a visual picture of how impactful PLC’s ministries are in their current state. After 50 years functioning with a dual denominational identity, the qualitative data (interviews, Emotional Thermostat, and Gospel Impact Survey) and quantitative data (Organizational Flow Chart, Financial Analysis Data Table) illustrate the intentionally loosely defined theological and organizational structures are being tested. For example, the evidence demonstrates this very “open-minded” community of believers is questioning the legitimacy of the “pastors” of Revive LA. Some respondents were concerned the process leading to their ordination was not acceptable, primarily due to lack of a theological degree and following a “regularly” accepted process of ordination.

The dual denomination topic seems to emerge regularly. The leaders could make many low-level technical changes, like making quick decisions prompted by the Gospel Imperative Decision Table (Appendix 19). While these activities may need to occur, and would create the sense of moving forward, they may move the stewardship needle very little. Tackling the dual denominational challenge would be an adaptive change and would create significant missional impact. This would be utilizing the organizational stewardship concept of “leverage.” Senge

argues for “leverage” as a strategic use of resources. He asserts, “The bottom line of systems thinking is leverage – seeing where actions and changes in structures can lead to significant, enduring improvements.”<sup>8</sup>

### **Expected Findings**

The leaders of PLC are accustomed to living with ambiguity. This ambiguity-tolerance would be commendable if the ambiguity facilitated creativity or generative learning. In this case, ambiguity has led to theological, organizational, and stewardship costs that may be contributing to ministry underachievement and, in some cases, deficits. While Pastors Long-term and Longest-term made it work for many years, it is possible the lack of definition became more problematic over time. Pastor Short-term stated clearly, “As much as they try to convince themselves, [the dual denominational affiliation] does not work. Too many egos are vested in its origins and legacy for the congregation to reassess the benefits, or not, in maintaining a dual denominational ministry today.”<sup>9</sup> Several key leaders dismiss Pastor Short-term’s opinions due to personal reasons related to his ministry and departure. Others have expressed to me the topic of dual denomination should be off the table: it should not be evaluated, monitored, or discussed. These may be the signs of protectionism and a closed system, forces of homeostasis.

There was a split between GIST Leader’s Evaluation Survey respondents over whether the dual denominational affiliation and theological differences are a significant drag on overall ministry effectiveness. As Argyris and Schön, explain, failure of an organization to learn is related to the degree views differ among individual members of the organization.<sup>10</sup> Certainly, the

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<sup>8</sup> Senge, *The Fifth Discipline*, 114.

<sup>9</sup> Research notes, March 2021.

<sup>10</sup> Argyris and Schön, *Organizational Learning II*, 67.

ambiguity makes it difficult for PLC to have a Vision for ministry and for individual ministries to align with that Vision.

Many of PLC members and leaders can now see how the congregation may be stuck around significant theological issues, practices, or relationships. A goal of the GIST tool is to provide a method of analyzing a congregation's current state ministry and stewardship effectiveness with their future state goals for vitality or needs for sustainability. The GIST tool accomplished the goal of providing a visual image of what PLC members and leaders perceptions are of the current state of ministry and stewardship effectiveness. They now have permission, a rationale, and a vocabulary to discuss strengths and weaknesses of the ministries within the context of improving congregational stewardship of God's mission, God's people, and God's things. I hope a beneficial result of working through the implied choices identified by the Gospel Imperatives Decision Table will help PLC leaders realize the need for greater clarity of spiritual identity, leading toward a clearer mission and Vision.

The GIST tool assists PLC leaders to recognize they do not have the resources to do all the ministries to the level they hope. I expect a beneficial result of this study will be providing a pathway for PLC to learn to speak intelligently and honestly about their stewardship challenges. For example, the congregational leaders (and especially the finance committee) were excited about how to allocate a pastor's (or other staff person's) time and related costs across the six formal ministries and two informal (partnership) ministries. The leaders had never seen this data before. They now realize it is crucial to monitor and strategically allocate time expenditures in position descriptions for staff persons for greater alignment and integration of ministry resources. This true cost data worksheet was especially beneficial in giving the leaders a better idea of how to formulate ministry descriptions for the next settled pastor and church secretary. I expect that

the PLC finance committee continues to use the “true cost” calculations when determining the value of ministry activities, and in expense projections.

It will be necessary for the leaders to report out to the congregation what they have learned. What to do with the learning? If the findings are taken seriously, several conversations should now take place with the rest of the congregation. The congregation should come to terms with their history. The congregation should evaluate their current governance model and staffing configurations and assess the options. The congregation should explore what their Vision for ministry is. These questions will all be addressed through the congregational self-study. A Transition Task Force (TTF) team has been put together to host cottage meetings<sup>11</sup> and explore further with the members the theological, organizational, relational, and programmatic implications of the GIST map findings. These will not be easy discussions. The GIST Ministry Map prompts the members in acknowledging the current ministry model is not meeting their expectations and that a robust solution should be offered for improvement when PLC is ready.

The GIST tool and GIST Ministry Map proved successful in providing clarity on the alignment of PLC’s core ministries toward improved Gospel impact and financial viability. PLC’s leaders demonstrated improvements in learning and knowledge of congregational stewardship concepts and practice. The GIST Ministry Map provides a vehicle for holding sensitive but much needed conversation. It is assisting the leaders to make their tacit concerns more explicit. In a way it is creating a healthy emotional triangle; that is, I am observing the leaders focusing their anxiety on to the GIST Ministry Map and not on each other. The GIST map doesn’t take it personally, so the conversation is able to continue and opposing viewpoints are able to remain in collegial dialogue. More objective discussions about such things as

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<sup>11</sup> See Appendix 28.

“alignment” in ministry are possible, since the focus is not personal, or even about performance. Instead, it becomes a conversation about priorities and Vision in ministry. PLC is struggling with the implications and beneficial outcomes may take time.

Overall, this research project was successful in the goals and benefits predicted through developing and testing the Gospel Impact and Stewardship Tool (GIST) for its usefulness in helping congregations like Palisades Lutheran Church align ministry efforts toward improving Gospel impact and financial health for present vitality and future sustainability. The findings and benefits of the GIST tool in application at PLC provides a sample of how the GIST tool developed through this study may be suitable for wide LCMS congregational (and other LCMS organization) applicability. The GIST Ministry Map may prove even more useful in larger churches with more staff, new staff hires, complex ministries, mergers, and multiple ministry teams to map. A visual picture of how the component parts work as a whole could provide clarity in a way similar to what PLC experienced, with the added benefit of meeting a greater need for clarity in a larger, more dynamic, ministry setting.

## CHAPTER SIX

### SUMMARY

At a recent pastor's conference in Denver, Colorado, Reggie McNeal<sup>1</sup> sounded the alarm. He warns, "Many churches would rather die than change."<sup>2</sup> It will become harder for mainline churches holding tight to past stewardship philosophies, or deep-rooted strategies of fraternal financial organizations (born out of or given rise during the industrial age), and outdated outreach and evangelism models. Many mainline denominations have fallen prey to the stewardship challenge that occurred in Acts 6:1, "In those days when the number of disciples was increasing, the Hellenistic Jews among them complained against the Hebraic Jews because their widows were being overlooked in the daily distribution of food." Maybe not coincidentally, the majority of church closures occur among the aged (and poor) of whom many are widows. LCMS President Rev. Dr. Matthew Harrison observes the shortages occurring for the aging congregations in the LCMS. He concludes, "large numbers of LCMS adherents tend to be found in counties that are losing population and where the median age is higher. To avoid further decline of the LCMS, young people must be persuaded to move to these communities (and those already living there must be dissuaded from moving)."<sup>3</sup>

At the same time, Harrison appears to recognize it may not be reasonable to expect young people to stay or move back to these areas where there is significant population decline. He envisions, "Alternatively, the LCMS will need to plant new churches in those communities

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<sup>1</sup> Church ministry consultant and author of "The Present Future," (2009).

<sup>2</sup> Denver, Colorado with the Dr. Reggie McNeal for the 2021 LuTMA Annual Conference, June 21 – 23, 2021.

<sup>3</sup> Ryan C. MacPherson, "Generational Generosity: Handing Down Our Faith to Our Children's Children," *Journal of Lutheran Mission* Volume 3, no. 1, Special Issue (December 2016): 24, <https://lcms.app.box.com/s/7srzc59zgc972sl9fbb9abnunql5skt2>.

where young people are moving.”<sup>4</sup> Many financial organizations are ready to assist in making the shift. These professional financiers will assist “legacy congregations” in translating their remaining property and assets into a “legacy fund.”

For instance, Christian Church Foundation of Indianapolis, Indiana offers, “When a congregation closes its physical ministry, it can still bless other ministries and provide its own lasting, faithful legacy.”<sup>5</sup> Legacy planning is a thoughtful approach to extending a congregation’s Gospel impact beyond the financial viability of their current ministry model. The legacy fund model is both adaptive and generative learning at the same time. It is adaptive since it leaves behind a gift for the next generation, similar to what people of God have endeavored to do from ancient times (Proverbs 13:22). It is generative since it is an innovative approach to ministry the congregation has not pursued before. In this approach, the church’s physical, tangible presence (assets) is translated to an intangible “legacy fund.”

Church consultants and stewardship specialists are thinking of new strategies to help churches transition from old ministry models to models for the next generation of church.<sup>6</sup> The key may be a balanced stewardship and revitalization approach. In Martin Luther’s explanation of the Seventh Commandment he writes, “We should fear and love God so that we do not take our neighbor’s money or possessions, or get them in any dishonest way, but help him to improve and protect his possessions and income.”<sup>7</sup> In this conversation, the concern is less on stealing and

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<sup>4</sup> MacPherson, "Generational Generosity," 24.

<sup>5</sup> “Legacy Congregations,” Christian Church Foundation: Helping Disciples Make a Difference, accessed October 30, 2021, <https://www.christianchurchfoundation.org/legacy-congregation>.

<sup>6</sup> The Michigan District of the LCMS will offer a continuing education conference to Intentional Interim Ministry (IIM) pastors in the Fall of 2021. The topic is holding facilitating the “legacy congregation” conversations. Some of the topics at the IIM Conference will be: “legacy congregation”, “When ‘revitalization’ is not an option”, “What part does ‘Kingdom geography’ play in the discussion”, and “How do we talk about closure.” (See Appendix 31, <https://michigandistrict.org/event/intentional-interim-ministry-continuing-education-fall21/>.)

<sup>7</sup> Martin Luther, *Luther’s Small Catechism with Explanation* (St. Louis, Missouri: Concordia, 2008), 85.

more on how to help our neighbor “improve and protect” their church ministry. Prior to effecting a merger or legacy fund strategy congregational leaders will benefit from a diagnostic analysis, or impact analysis, of the current state of day-to-day ministry. These impact analysis tools guide the leaders to making intelligent decisions and give the ability to measure and monitor both Gospel impact and financial viability. After utilizing generative and adaptive learning for ministry revitalization to no avail, then the merger and legacy conversations may make sense.

Building projects and strategic real estate purchases, anticipating where the next population wave may occur,<sup>8</sup> can make for exciting times and rally resources. A great deal of emphasis for the congregations is placed on buildings and a great deal of emphasis for the judicatories is placed on real estate purchases<sup>9</sup> and the proverbial “location, location, location.” This approach may work and may be the right move in the short-term, but it is not transformational. In a way it may be chasing the market. A chase-the-market strategy is difficult with efficient markets and trends that are already widely known and established.<sup>10</sup> Many congregations may be too distracted by building projects to practice transformational stewardship, neglecting resourcing missional activities toward the *Missio Dei*.

Congregations often receive harsh criticism for existing just to maintain their brick and mortar, while having been sold the buildings or building projects as a solution to waning growth in the first place. Often this is referred to as a maintenance ministry. Local churches and schools

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<sup>8</sup> Five District Executives of the LCMS have discussed with me various strategies to consolidate the smaller, and older, churches with “vital momentum-filled lead church partnering” (“Better Together: Making Church Mergers Work,” Jim Tomberlin and Warren Bird.) consequently forming a bigger church.

<sup>9</sup> This trend is reminiscent of the efforts in Luther’s day to build St. Peter’s Cathedral and of Mark 13:1.

<sup>10</sup> Investopedia notes, waiting too long to chase trends that have already been well established and priced into valuations is where investors may find trouble. Investing based heavily on market chasing emotion rather than careful analysis can also be problematic and unprofitable on the whole. ([Chasing the Market Definition \(investopedia.com\)](#))



need solutions that help them navigate the changed economic environment without neglecting the mission of the church to seek and save the lost. Bell, Masaoka, and Zimmerman's *Nonprofit Sustainability* offers a working model that can apply in churches: a dual bottom line with both programmatic and financial elements.<sup>11</sup>

Technical changes can disguise fundamental failings.<sup>12</sup> Relying on *past* knowledge is not learning and may even be counterproductive, “tend[ing] to misdirect inquiry rather than facilitate problem resolution.”<sup>13</sup> Training in past knowledge “may do little more than to make organizations proficient in yesterday’s techniques.”<sup>14</sup> Instead, congregations are to be learning organizations, “subject to a ‘learning imperative.’”<sup>15</sup>

Ronald Heifetz, Alexander Grashow, and Marty Linsky warn the organizational system is fierce and will attempt to assimilate, meaning aggressively absorb new members into the current state. Heifetz, et al., explain why organizations often push forward without adapting to the changes around them. They assert, “Organizational systems take on a life of its own, selecting, rewarding, and absorbing members into it who then perpetuate the system.”<sup>16</sup> The goal for many mainline denominational churches is to keep the machine and momentum going, avoiding any delay. Heifetz, et al., warn such self-reinforcing behavior can “become tenacious quickly.”<sup>17</sup> That is, the organizational system discourages behavior that disrupts the established way of thinking

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<sup>11</sup> Bell, et al., *Nonprofit Sustainability*, 23–5.

<sup>12</sup> “Lipstick on a Pig,” Wikipedia: The Free Encyclopedia, accessed October 30, 2021, [https://en.wikipedia.org/wiki/Lipstick\\_on\\_a\\_pig](https://en.wikipedia.org/wiki/Lipstick_on_a_pig).

<sup>13</sup> Schwandt and Marquardt, *Organizational Learning*, 3.

<sup>14</sup> Schwandt and Marquardt, *Organizational Learning*, 3.

<sup>15</sup> Argyris and Schön, *Organizational Learning II*, xvii.

<sup>16</sup> Ronald Heifetz, Alexander Grashow, and Marty Linsky, *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World*, (Boston, Mass: Harvard Business Press, 2009), 50.

<sup>17</sup> Heifetz, et al., *The Practice of Adaptive Leadership*, 50.

and talking, even during times of momentous change. The IIM pastor enters a system to disrupt the established way of thinking and talking, making use of times of momentous change to facilitate healthy new beginnings.

In all his wisdom, King Solomon advises, “There is a time for everything, and a season for every activity under the heavens: a time to be born and a time to die, a time to plant and a time to uproot, a time to kill and a time to heal, a time to tear down and a time to build” (Ecclesiastes 3:1–3). Just like individuals, organizations like churches, may naturally come to die. They may have fulfilled their mission on earth and deserve to receive a dignified death, being allowed to depart in peace so that new ministries may emerge. However, other churches may die prematurely from neglect or intentional means, so that the assets can be redistributed for other purposes. The GIST tool offers a practical solution to both diagnosing organizational stewardship problems and providing a map toward better organizational stewardship decision-making for both Gospel impact and financial viability.

The challenge in this project was to develop a stewardship analysis tool that is able to provide a visual map that can be applied at any congregation or faith-based organization to show the integration of Gospel impact and financial viability of the individual ministries. God, the Master Steward, cleverly (with redemption for all in mind) uses material and human resources to force us into conversation (transactions) with Him and each other. In the marketplace of humanity, forced transactions under the law must occur, giving opportunities to put our faith to practice – to love the Lord and love our neighbor. In the Church, her pastors should not shy away from such conversations, as our Lord did not hold onto His equality with God but chose to deal with us in the profane and material world (Philippians 2:6–7). Instead, more reflection and awareness of the transformational stewardship opportunities in this new age, leading to

innovative and missional responses, should happen.

The Apostle Paul explains, “This, then, is how you ought to regard us: as servants of Christ and as those entrusted with the mysteries God has revealed. Now it is required that those who have been given a trust must prove faithful” (1 Corinthians 4:1–2). Gregory Lockwood describes, “The passive ‘be found’ implies an agent, a master who expects and finds faithful service from his steward. Although 4:2 is a general statement about the most desirable quality in stewards, it also takes its color from the context, where Paul has in mind his stewardship of God’s mysteries and his accountability to God.”<sup>18</sup> The church and her under-stewards must be found faithful. Lockwood highlights, as does the Apostle Paul, this means faithfulness in stewarding the mysteries of God. All things should be marshaled for the benefit of advancing this singular mission – to seek and to save the lost, to restore that which belongs to the Master Steward.

The good news is God is in the business of opening minds, eyes, and hearts, giving knowledge and cultivating learning (Luke 24:31). God blesses His little Church with all sorts of earthly tools and broken vessels to be recruited into the service of the Gospel of Jesus. It is my fervent prayer more work will be done by LCMS stewardship leaders, seminary faculty, parish pastors, and congregational leaders to refine and make improvements on this stewardship assessment tool referred to in this project as the “Gospel Impact and Stewardship Tool” (GIST). Hopefully, although small, it will be a mighty servant in the Master Steward’s hands.

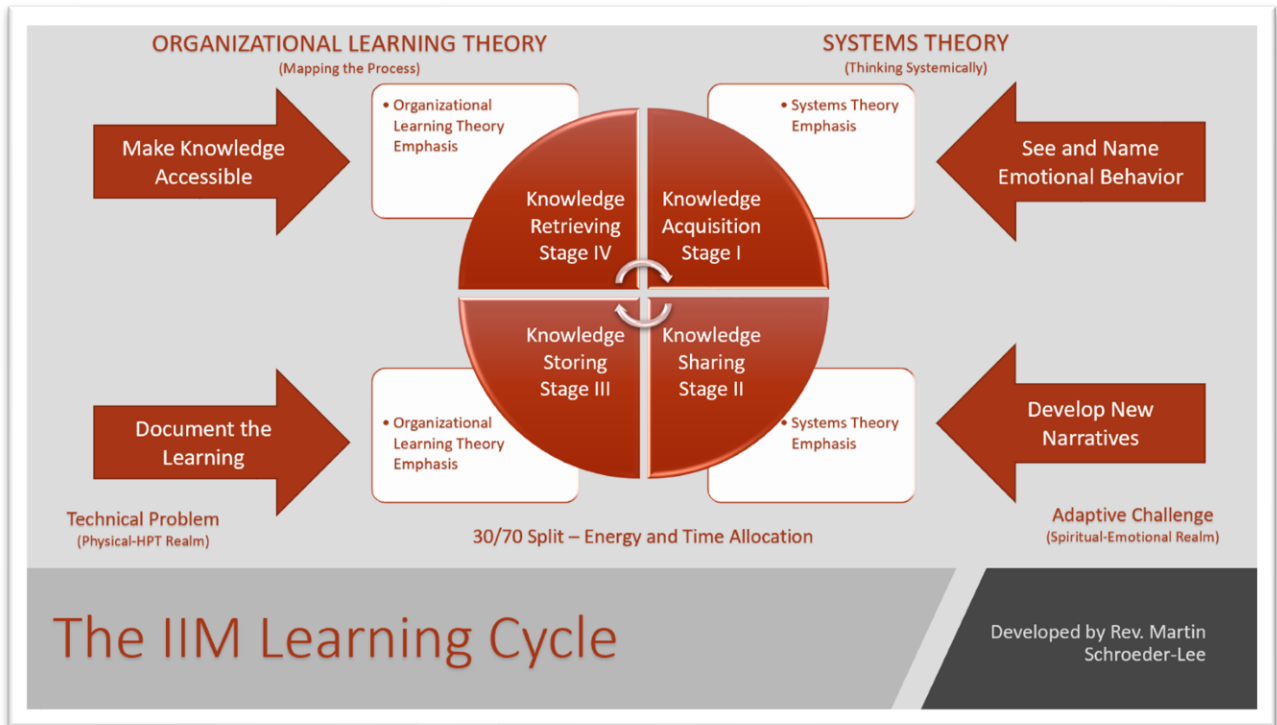
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<sup>18</sup> Gregory J. Lockwood, *Concordia Commentary: I Corinthians*, (St. Louis, MO: Concordia, 2000), 129.

# APPENDIX ONE

## Knowledge Wheel and Learning Process

Figure 6: Two Complementary Theories to Promote Congregational Stewardship



## APPENDIX TWO

### MATRIX MAP STRATEGIC IMPERATIVES



## APPENDIX THREE

### ONE-ON-ONE INTERVIEW QUESTIONS

#### (ADAPTED FROM NALIP MANUAL)

**(Instructions:** I am encouraging every member, or friend, of the congregation who schedules a meeting with me to please complete this interview tool. Not only will it help inform our meeting it will provide me a reference point for reporting to the congregation various themes and patterns which emerge from within the congregation.)

1. What do you see as the three major concerns your congregation has during this pastoral transition?
  - a.
  - b.
  - c.
2. What would you like to see accomplished during the next six months?
3. What steps are necessary to take in order to meet any or all these goals?
4. What do you see as some of the strengths of your congregation?
5. In what areas does your congregation need to make improvements or do better?
6. In what specific ways do you want the interim pastor to support you during this transitional period?
7. What are some specific ways you intend to support the interim pastor?
8. What are your feelings about the future of this congregation?
9. What are some of the attitudes expressed by the members about the congregation's life and mission?
10. Name any trends you have seen occur since your former pastor left?
11. What is your involvement in this congregation? (Past and present)

Are there any other concerns/issues you would like to mention here

## APPENDIX FOUR

### EMOTIONAL THERMOSTAT

1) When completing the “Emotional Thermostat” as part of the one-on-one interviews...

- **Three (3)** people responded: “Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.”

- **One (1)** person responded: “Very distressed; I’ll have to wait and see.”

- **Two (2)** people responded: “Feel very distressed: am participating in this process to help myself and our congregation with the healing that needs to be done.”

- **Five (5)** people responded: “Am moderately distressed about events at our church, yet...”

- **One (1)** person replied: “Am still somewhat upset, need healing time, but will continue to participate.”

- **Three (3)** people responded: “Am okay but will need time with new leadership.”

- **Five (5)** people responded: “Am okay about things and look forward to new leadership and mission.”

- **One (1)** person responded: “Doing quite well, thank you, and looking with excitement to our future mission.”

2) “Stabilization of membership so we don’t lose more members.”

3) “We need to open up from being a country club like church to a missionary church that speaks to you and young people.”

4) “Give me and my wife motivation to stay in PLC.”

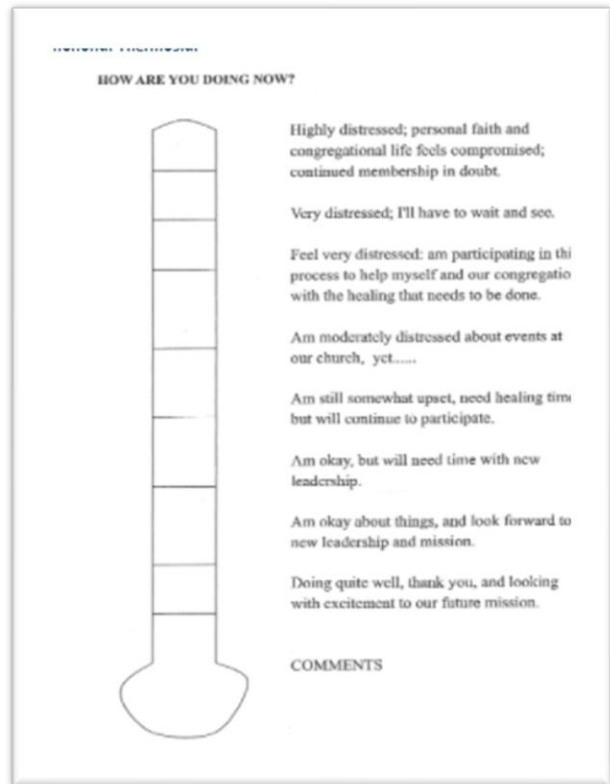
5) “I need to feel comfortable and cannot do so with some members mindset.”

6) “It is in trouble. A declining and aging congregation.”

7) “The downward membership trend predates Pastor Davis.”

8) “Part of the pruning is God’s plan. We have to trust God.”

9) “Concerned about losing membership and keeping good people involved.”



The diagram shows a vertical thermometer-like scale with 10 horizontal segments. To the right of the scale are seven descriptive levels of distress, each corresponding to a segment. The top segment is labeled 'Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.' The second segment is 'Very distressed; I'll have to wait and see.' The third is 'Feel very distressed: am participating in the process to help myself and our congregation with the healing that needs to be done.' The fourth is 'Am moderately distressed about events at our church, yet....'. The fifth is 'Am still somewhat upset, need healing time but will continue to participate.' The sixth is 'Am okay, but will need time with new leadership.' The seventh is 'Am okay about things, and look forward to new leadership and mission.' The eighth is 'Doing quite well, thank you, and looking with excitement to our future mission.' Below the scale is a section labeled 'COMMENTS'.

Figure 2 - Emotional Thermostat

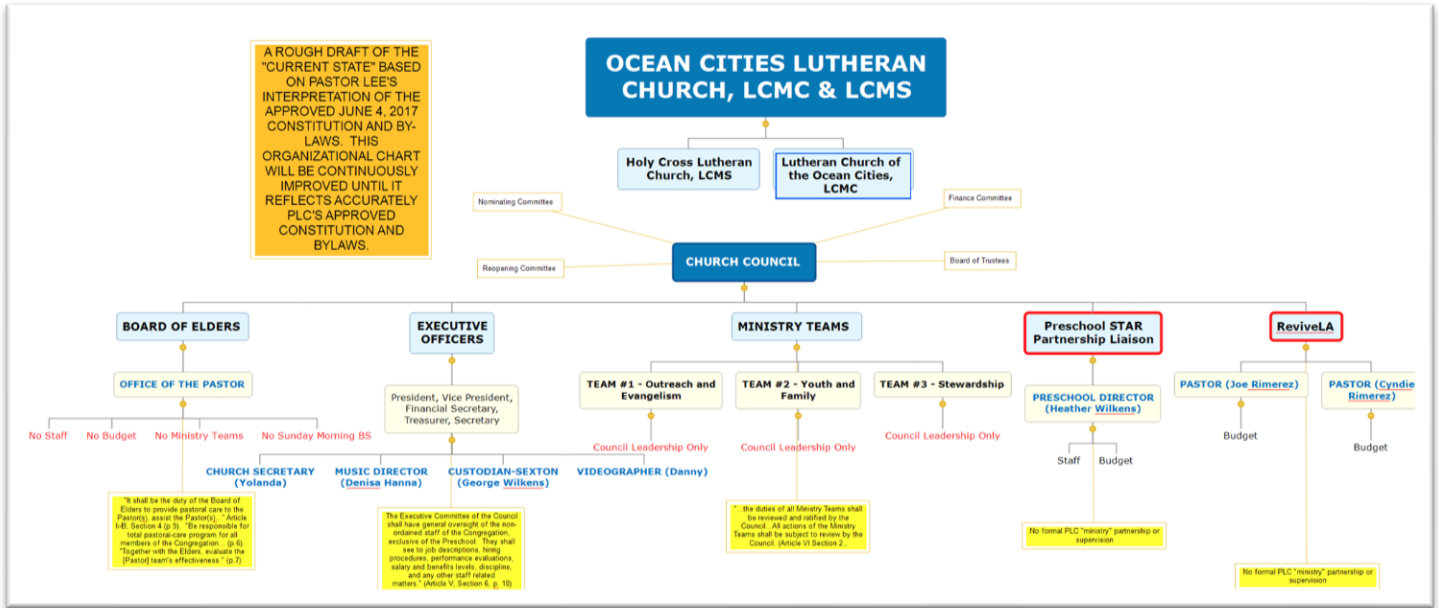
- 10) “Growing an interested and eager participation of ‘new recruits.
- 11) “I have rather bad feelings that we will not have a future.”
- 12) “Very capable and devoted people, though numbers are dwindling. Excellent physical buildings and space.”
- 13) “We need to move closer to 150 members than 50 (it would be ok to go to over 150 but I doubt it happens).”
- 14) “Uncertain about future. Membership has declined over the past 25 years.”
- 15) “We are vibrant, diligent & very much alive, but also an aging group. That said, we need to figure out how to attract members of all ages, adults & children alike



# APPENDIX FIVE

## ORGANIZATIONAL CHART

Figure 7: Organizational Chart (Current State) for Palisades Lutheran Church



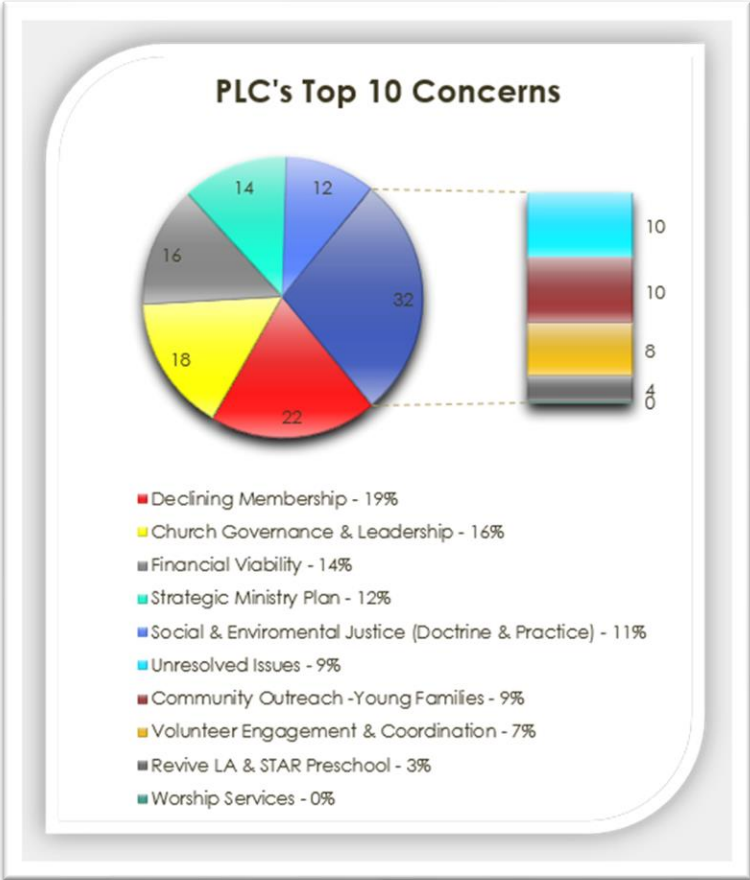
## APPENDIX SIX

### **PALISADES LUTHERAN TOP 10 CONCERNS**

Be confident and do not fear! “He will never leave you nor forsake you. Do not be afraid; do not be discouraged” (Deuteronomy 31:8). When addressing matters of concern for congregational members, it can get discouraging fast! We need to take a deep breath and remember that God is still God and knows what He is doing. Some members are ready for the roller coaster ride! One member commented: “Let them (The Palisades) know we’re alive.” The same person continued, “Be patient, calm, kind...clever?” concluding that PLC members can stay future-focused and hopeful. To that encourager, we say: “AMEN!” God intends to redeem this time between settled pastors. So, buckle up! BIG Hairy Audacious (and Divine) Goals ahead!

When asked the one-on-one interview question, “What do you see as the three major concerns your congregation has during this pastoral transition?” the top six member responses were: *Declining Membership, Church Governance and Leadership, Financial Viability, Strategic Ministry Plan, Social Justice and Environment Issues, and Unresolved Issues*. The chart below reflects the cumulative responses.

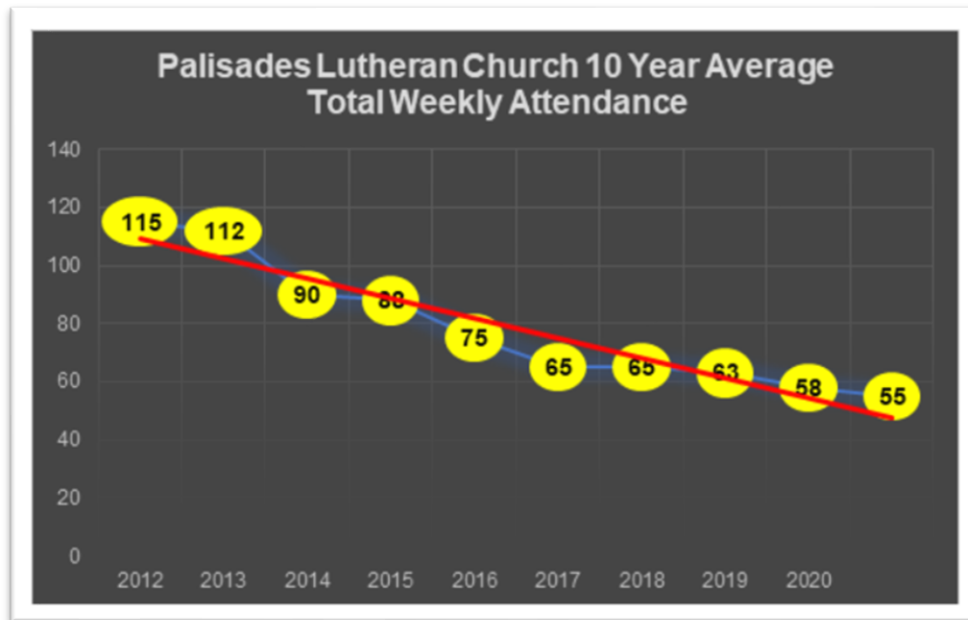
Figure 8: Palisades Lutheran Church's Top Ten Concerns



## APPENDIX SEVEN

### PALISADES LUTHERAN 10-YEAR AVERAGE WEEKLY ATTENDANCE

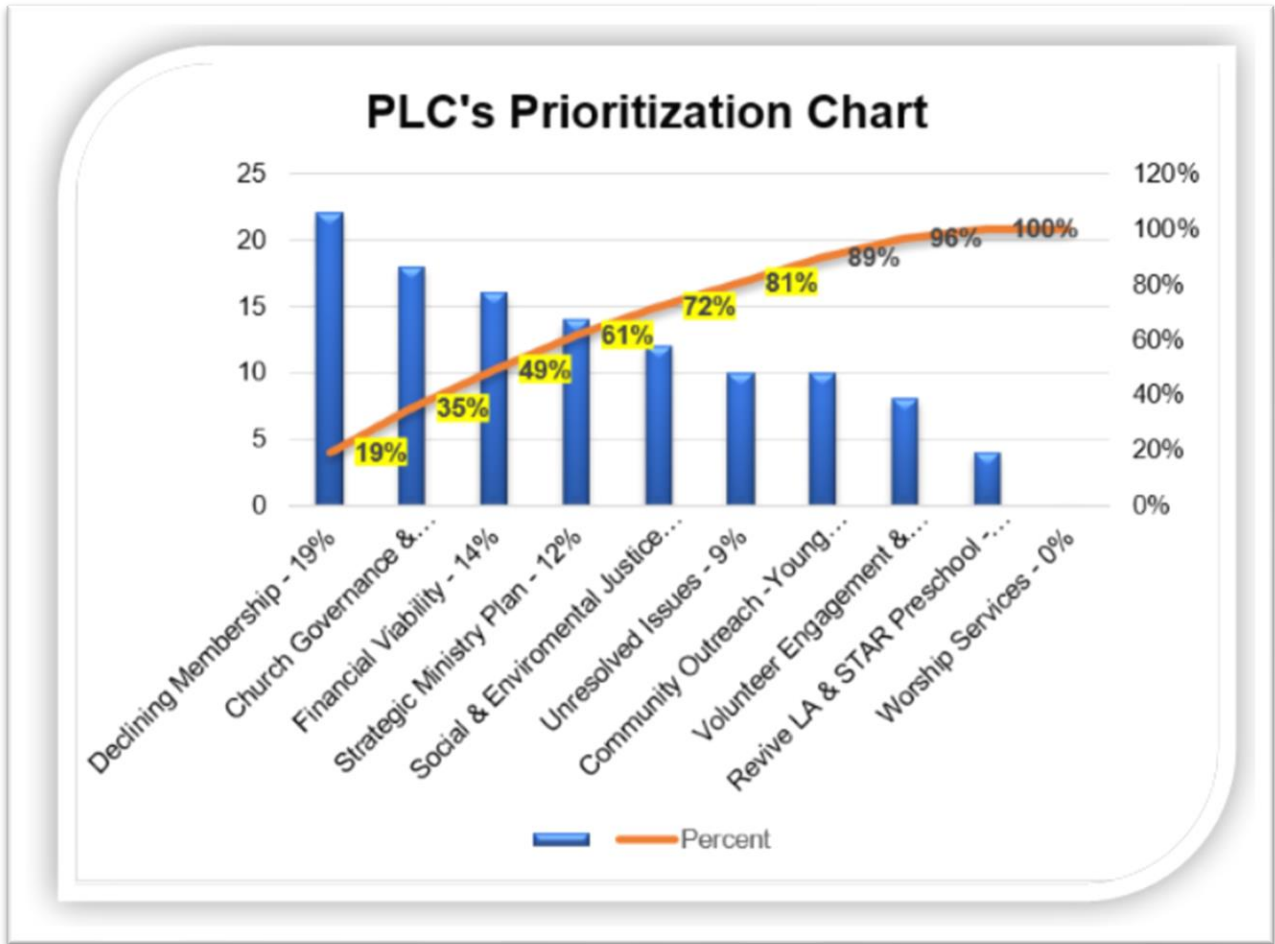
Figure 9: Palisades Lutheran Church Average Weekly Attendance (AWA)



## APPENDIX EIGHT

### PALISADES LUTHERAN PRIORITIZATION CHART

Figure 10: Prioritizing Palisades Lutheran's Member Concerns

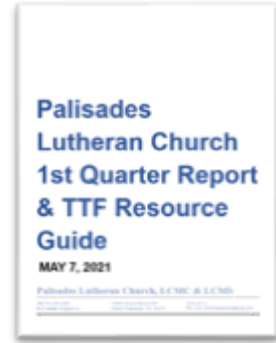


## APPENDIX NINE

### 1<sup>ST</sup> QUARTER REPORT - INTRODUCTION

#### Purpose

Intentional Interim Ministry (IIM) is provided for the unique time between pastors both to *repair* from past experiences and to *prepare* for the future. IIM includes perspectives that are derived from systems thinking and organizational learning and stewardship. The only persons who can make fundamental change in a system are the people involved in the emotional process themselves. Although the Intentional Interim Pastor (IIP) has adaptive leadership skills, tools, and techniques to encourage it, the change that needs to happen comes by God's grace to the Congregation from the inside out – not from the outside in.<sup>1</sup> In preparing the IIM 1<sup>st</sup> Quarter Report, my objective is to be a faithful lens, describing the church as it is seen by the members – the themes and narratives that are important to you.



#### Participation

Dear Members of Palisades Lutheran Church, thank you for your participation. It adds to the collective learning process. I arrived on Monday, February 1, 2021 and it has now been 3 months (at 4/5 time) since we began this journey together. Special thanks to Palisades Lutheran Church staff, lay-leaders, and members who have worked diligently to gather data, fill out surveys, attend focus group meetings, and provide proof reading<sup>2</sup> to deliver an accurate document for PLC's congregational self-study and continued learning.

Content in the *1<sup>st</sup> Quarter Report* has been assembled from 51 one-on-one member interviews, three Council meetings, three Elder meetings, one Youth and Family Ministry Team meeting, six congregational Bible studies, four staff meetings, more than fifty telephone conversations and hundreds of texts and emails with individual members. The following internal documents and survey results have been consulted:

1. **Palisades Lutheran Church By-laws** ("Most Recent Amendment June 4, 2017").
2. The STAR Preschool Agreement – 2020 – 2021 "At Palisades Lutheran Church."
3. **Palisadian-Post** – "Out of the Past" article, dated February 11, 2021.
4. **Synthesis of all 5 Elders small group** meetings held in October and November 2019 and Elders summary delivered December 2019. ("Snapshot of history of PLC including conflict history.")
5. A Questionnaire of 12 questions from Rev. Kenneth Davis to Rev. Wally Mees.
6. An Update on Children's Church from John Hellmuth dated March 1, 2021.
7. Desired Outcomes of Intentional Interim Ministry at PLC submitted by the Council and Elders on October 20, 2020 to Rev. Martin Lee, IIP and the Pacific Southwest District of the LCMS.
8. The LCMS Church 10-Year Statistics and Records for PLC.<sup>3</sup>
9. PLC's annual income statements from 2011 – 2020 and PLC Financial Notes
10. Leadership Survey – Gospel Impact & Stewardship Tool (GIST) for strategic

ministry planning.

## **Document Summary**

The *1<sup>st</sup> Quarter Report* is intended to be a resource for the members and stakeholders of Palisades Lutheran Church (PLC), the Pacific Southwest District (PSD) of the Lutheran Church—Missouri Synod (LCMS), and the Lutheran Congregations in Mission for Christ (LCMC). It will be used by the Transition Task Force (TTF) as the primary resource document for leading the congregational self-study (IIM Phase Two) over the next six months. In fact, it is now a historical document of PLC. This report is divided into two sections:

- **Section I: PLC Top 10 Concerns (ministry priorities)** – This is a major part of the report, making up nearly two-thirds. The structure is give-and-take. The members give their responses to various questions and receive adaptive feedback from IIP. This entire section is guided by the “Top 10” member concerns. Remember, **God promises** He is working through “*all things*,” withholding nothing, so that your joy might be made complete (John 15:11).
- **Section II: Recommendations** – In this section I recommend four topics for congregational learning. Together, we will seek to create communities of interest around these topics. Dr. Karl Albrecht observes, “The combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.” May God and His Word lead our thoughts and actions that we may “*throw off everything that hinders*” and “*run the race marked out for us.*” (Hebrews 12:1).

## APPENDIX TEN

### 1<sup>ST</sup> QUARTER REPORT - RECOMMENDATIONS

#### **RECOMMENDATION #1 – CHURCH GOVERNANCE AND LEADERSHIP** (pgs. 11 – 18)

Become aware of church governance options with leadership styles that make sense for PLC. Choose and implement the church governance model and leadership style, faithfully and in Christian love.

#### **RECOMMENDATION #2 – STRATEGIC MINISTRY PLAN** (pgs. 22 – 30)

Identify a ministry Vision for PLC. Utilize the Gospel Impact and Stewardship Tool (GIST) to create a ministry map around PLC's core ministries. Facilitate group discussions to evaluate strategic imperatives, and vote on a strategic ministry action plan.

#### **RECOMMENDATION #3 – SOCIAL AND ENVIROMENTAL JUSTICE**

**(Doctrine & Practice)** (pgs. 31 – 36)

Review Appendix A and add a column for the LCMS. Study PLC's doctrinal and denominational identity. Study the Commission on Church Theology and Relations (CTCR) document titled: "Render Unto Caesar...Render Unto God: A Lutheran View of Church and State." Facilitate group discussions on the complexities involved in matters of conscience and to appreciate the similarities and differences between divine and social activism.

#### **RECOMMENDATION #4 – UNRESOLVED ISSUES** (pgs. 38 – 46)

Identify and address patterns that prevent PLC from *coming to terms with history*. Facilitate conversation to aid in repairing from the past and preparing for the future. Work through the grief/change process in a positive and constructive manner so that healing may begin.



## APPENDIX ELEVEN

### PLC CORE MINISTRIES IDENTIFIED

Figure 11: Core Ministries of Palisades Lutheran Church

WORSHIP MINISTRY	BIBLE STUDY MINISTRY
YOUTH AND FAMILY MINISTRY	OUTREACH AND EVANGELISM
STEWARDSHIP MINISTRY	REVIVE LA MINISTRY
STAR PRESCHOOL MINISTRY	ELDER MINISTRY

## APPENDIX TWELVE

### PARTICIPANT'S INSTRUCTIONS

#### SECTION 1 OF 4 – GOSPEL IMPACT STEWARDSHIP TOOL INTRODUCED

Every church has a ministry model that can be visually mapped. That is, every church has a set of core activities it executes, and strategies for obtaining the necessary funds. Often, such activities and funding strategies are not well articulated.

The first step in making the ministry model explicit is identifying the church's core ministries and mapping their impact on promoting the Gospel of Jesus Christ. A robust way of considering relative impact is to look more closely at the components of impact.

The following four criteria have been selected:

- Alignment with Core Mission
- Excellence in Execution
- Community Building
- Leverage

On a scale of 1 to 4, with 4 being the highest, please rate each of the 8 ministries on the four criteria listed below. As you complete your assessments, remember that there are no "right" answers, and consider all the information you have from your experience with the ministry.

Ratings:

- "1" not much impact
- "2" some impact
- "3" very strong impact
- "4" exceptional impact

Please know this process is not about deciding which ministry programs are good and which are bad. Rather, it is about acknowledging and collectively thinking through which ministry programs have relatively more Gospel impact than others. Therefore, ministry programs cannot all be at the low end or high end of the impact spectrum.

#### SECTION 2 OF 4 – GIST PURPOSE

This research project will assess what congregational stewardship knowledge and practices may be improved on for greater vitality and sustainability. This study will culminate in a Gospel Impact and Stewardship Tool ("GIST") Map which will place core ministries onto a visual map consisting of four quadrants (also see image below):

- “The STAR: High Gospel Impact High Financial Viability,”
- “The STOP SIGN: Low Gospel Impact, Low Financial Viability,”
- “The HEART: High Gospel Impact, Low Financial Viability,” and
- “The MONEY TREE: Low Gospel Impact, High Financial Viability.”

The purpose of assessing the Gospel impact and financial viability of ministries is to encourage alignment among ministry efforts and foster congregational learning opportunities in stewardship knowledge and practice.

This research project will aim to identify perceived deficits in two stewardship categories: Gospel impact and financial health. It will provide a method of assessing a congregation's current state ministry and stewardship effectiveness with their future state goals for vitality or needs for sustainability. I hope the Gospel Impact and Stewardship Tool ("GIST") developed through this study will be suitable for wide congregational applicability.

I expect the beneficial results of this project to be to:

- (1) clarify mission and vision.
  - (2) align resources according to God's mission and the ministry vision.
  - (3) provide a pathway for church and school partners to speak intelligently and honestly about congregational stewardship challenges.
  - (4) prompt discussions on how to effectively address the congregational stewardship problems in a comprehensive and integrated manner.
  - (5) motivate church leaders and ministry teams to partner and collaborate on congregational stewardship decisions.
  - (6) identify strategic imperatives; that is, which ministries to grow ("The Star"), contain costs ("The Heart"), increase impact ("The Money Tree"), and close or give away ("The Stop Sign"); and
  - (7) encourage church and ministry team partnerships to adopt, as routine practice, the use of the Gospel Impact and Stewardship Tool (GIST) in monitoring and reporting mission progress.
- In summary, the ultimate desired outcome will be improved participation in God's mission to feed the sheep and reach the lost and leave our Church and ministries in a better condition than when received.

### SECTION 3 OF 4 – DESCRIPTION OF HOW THE DATA WILL BE ANALYZED AND INTERPRETED

Findings and conclusions will be evaluated against the ability to organize and interpret data into achievable goals and recommendations for congregations. The project will provide an assessment of the Gospel Impact and Stewardship Tool's usefulness as applied at Palisades Lutheran Church. The findings will then be evaluated on the need for such a tool, the ease of use of the tool, and the sample congregation's relative satisfaction with the tool and the results.

### SECTION 4 OF 4 – INFORMED CONSENT/ASSENT DOCUMENT

Researcher: Rev. Martin E. Lee, M.Div.

Title: Student, Doctor of Ministry

Location: Palisades Lutheran Church, California

The Purpose: This research project will assess what congregational stewardship knowledge and practices may be improved on for greater vitality and sustainability.

Reason for conducting research: To provide a congregational stewardship assessment of alignment of ministry efforts for Gospel impact and financial health.

Member of Palisades Lutheran Church.

Selection Process: You were selected because you are listed as a member of Palisades Lutheran Church.

Description of What Participant is to do: Complete to the best of their ability the survey questions.

Length of time participation will take: 30 - 45 minutes

How anonymity will be protected: Any names will be altered for purposes of protecting individual identities.

How information will be protected: All digital data from this research project will be stored on my password protected lap top computer. Hard copies of all data (to include consent forms, transcriptions of interviews, surveys) will be stored in a secure, locked file cabinet at my home office.

Benefits to Participants: Benefits may be realized by Palisades Lutheran Church, not necessarily by individual members. Positive outcomes may result from this project, including reaffirming the mission and vision, promoting unity around sharing the mission and vision between ministries, and highlighting opportunities to align human, facility, and financial resources.

Risks to Participants: The only foreseeable discomfort would be in the process of self-reflection. That is, issues may rise that highlight areas of dissatisfaction with the current state of the congregation's stewardship.

Assurance of Voluntary Participation: Your records will be kept confidential and will not be released without your consent except as required by law.

Your identity will be kept private. If the results of this study are written in a theological or scientific journal, or presented at a professional or scientific meeting, your name will not be used. The data will be stored in a locked file cabinet. Your digitally signed consent form will be stored in a cabinet separate from the data. Any interviews with audiotape will be transcribed without any information that could identify you. And recordings will then be erased [or destroyed].

Assurance that withdrawing from the research has no consequences: Your decision to take part in this research study is entirely voluntary. You may refuse to take part in, or you may withdraw from the study at any time without penalty or loss of benefits to which you are normally entitled. You may leave the study for any reason.

**Statement of Your Consent:**

I have read the above description of this research study. I have been informed of the risks and benefits involved, and all my questions have been answered to my satisfaction. Furthermore, I have been assured that any future questions I may have will also be answered by the researcher. By submitting my name, email address and answers I am voluntarily agreeing to take part in this study. I understand I will receive a copy of this consent form sent to my email.

As a participant you will be able to receive copies of your answers on request.

You can reach the researcher, Martin E. Lee at: 517-755-8770.

Should you have any questions or concerns you can contact Martin E. Lee's supervisor, Rev. Dr. David Peter at: 314-505-7101.

For further assistance please contact Rev. Dr. Mark Rockenback, Director of Doctor of Ministry program at Concordia Seminary. Dr. Rockenback can be reached for questions or concerns at: 314-505-7109.

Concordia Seminary, 801 Seminary Place, St. Louis, MO 63105.

**APPENDIX THIRTEEN**

**GOSPEL IMPACT SURVEY QUESTIONS**

Answer to the best of your ability. It may be tempting to give responses to show favor to one ministry or another. Please make every effort not to. This is an opportunity to think in a new way about the different dimensions of PLC's mission, ministry, and funding.

1. Name \*

---

2. Email \*

---

**Survey Questions**

Answer to the best of your ability. It may be tempting to give responses to show favor to one ministry or another. Please make every effort not to. This is an opportunity to think in a new way about the different dimensions of PLC's mission, ministry, and funding.

3. A. 1. Relative to other programs, how well does PLC's WORSHIP MINISTRY <sup>1 point</sup> contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* *Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

4. 2. Relative to other programs, how well do PLC's BIBLE STUDIES contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* *Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

5. 3. Relative to other programs, how well does PLC's YOUTH AND FAMILY MINISTRY contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* 1 point

Mark only one oval.

---

Not much impact  1  2  3  4 Exceptional impact

---

6. 4. Relative to other programs, how well does PLC's OUTREACH AND EVANGELISM contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* 1 point

Mark only one oval.

---

Not much impact  1  2  3  4 Exceptional impact

---

7. 5. Relative to other programs, how well does PLC's STEWARDSHIP MINISTRY contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* Mark only one oval.

---

Not much impact  1  2  3  4 Exceptional impact

---

8. 6. Relative to other programs, how well does REVIVE LA contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* Mark only one oval. 1-point

---

Not much impact  1  2  3  4 Exceptional impact

---

---

Not much impact     Exceptional impact

---

9. 7. Relative to other programs, how well does STAR PRESCHOOL contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* *Mark only one oval.* 1-point

---

Not much impact  1  2  3  4 Exceptional impact

---

10. 8. Relative to other programs, how well do the ELDERS contribute to PLC's overall mission to promote the Gospel of Jesus Christ? \* *Mark only one oval.* 1-point

11. B. 1. Is PLC's WORSHIP delivered in an exceptional manner? \* 1 2 3 4

*Mark only one oval.*

---

Not much impact  1  2  3  4 Exceptional impact

---

12. 2. Are PLC's BIBLE STUDIES delivered in an exceptional manner? \* 1 point

*Mark only one oval.*

---

Not much impact  1  2  3  4 Exceptional impact

---

13. 3. Are EVANGELISM AND OUTREACH at PLC delivered in an exceptional manner? \* 1-point

*Mark only one oval.*

---

Not much impact  1  2  3  4 Exceptional impact

---

14. 4. Are YOUTH AND FAMILY MINISTRIES at PLC delivered in an exceptional manner? 1-point  
\*

*Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

15. 5. Is STEWARDSHIP at PLC delivered in an exceptional manner? \*

*Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

16. 6. Is REVIVE LA delivered in an exceptional manner? \*

1  
point

*Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

17. 7. Is STAR PRESCHOOL delivered in an exceptional manner? \*

1  
point

*Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---

18. 8. Is the ELDER MINISTRY delivered in an exceptional manner? \*

1  
point

*Mark only one oval.*

---

Not much impact  <sup>1</sup>  <sup>2</sup>  <sup>3</sup>  <sup>4</sup> Exceptional impact

---



19. C. 1. Does PLC's WORSHIP MINISTRY build community around PLC Church as a whole? \*

Mark only one oval.

---

Not much impact     1     2     3     4    Exceptional impact

---

20. 2. Does PLC's BIBLE STUDY MINISTRY build community around PLC Church as 1 point a whole? \*

Mark only one oval.

---

Not much impact     1     2     3     4    Exceptional impact

---

21. 3. Does PLC's YOUTH AND FAMILY MINISTRY build community around PLC 1 point Church as a whole? \* Mark only one oval.

---

Not much impact     1     2     3     4    Exceptional impact

---

22. 4. Does PLC's STEWARDSHIP MINISTRY build community around PLC Church 1 point as a whole? \*

Mark only one oval.

23. 5. Does REVIVE LA build community around PLC Church as a whole? \*

Mark only one oval.

---

Not much impact     1     2     3     4    Exceptional impact

---

24. 6. Does PLC's OUTREACH AND EVANGELISM MINISTRY build community around PLC Church as a whole? \* 1 point

Mark only one oval.

Not much impact  1  2  3  4 Exceptional impact

25. 7. Does STAR PRESCHOOL build community around PLC Church as a whole? 1 point \*

Mark only one oval.

Not much impact  1  2  3  4 Exceptional impact

26. 8. Does ELDER MINISTRY build community around PLC Church as a whole? \* 1 point

Mark only one oval.

Not much impact  1  2  3  4 Exceptional impact

27. D. 1. Does PLC's WORSHIP MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \*

Mark only one oval.

Not much impact  1  2  3  4 Exceptional impact

28. 2. Does PLC's BIBLE STUDY MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \* 1-point

Mark only one oval.

---

Not much impact     1     2     3     4    Exceptional impact

---

29. 3. Does PLC's YOUTH AND FAMILY MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \* 1-point

*Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

30. 4. Does PLC's OUTREACH AND EVANGELISM MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \*

*Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

31. 5. Does PLC's STEWARDSHIP MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \* 1-point

*Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

32. 6. Does REVIVE LA MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \* 1-point
- Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

33. 7. Does the ELDER MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? \* *Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

34. 8. Does STAR Preschool benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole? <sup>1-point</sup> \* *Mark only one oval.*

---

Not much impact     1     2     3     4    Exceptional impact

---

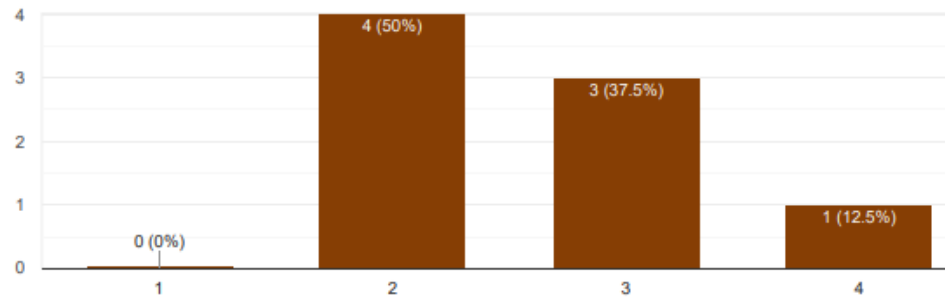
## APPENDIX FOURTEEN

### SURVEY RESULTS

#### Survey Questions

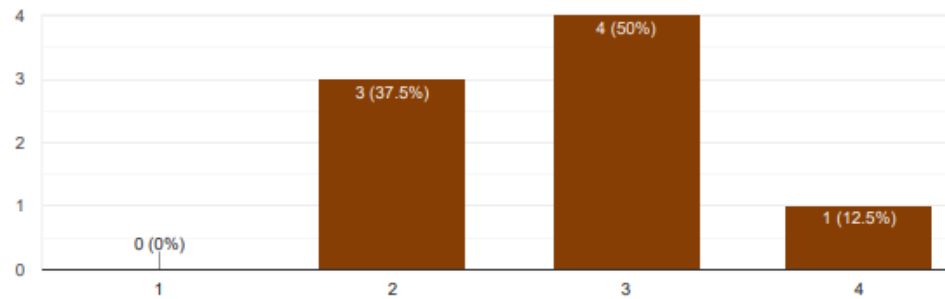
A. 1. Relative to other programs, how well does PLC's WORSHIP MINISTRY contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



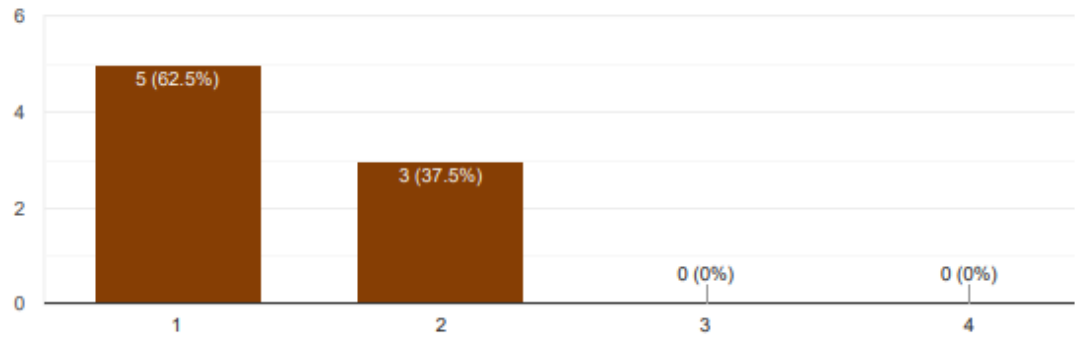
2. Relative to other programs, how well do PLC's BIBLE STUDIES contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



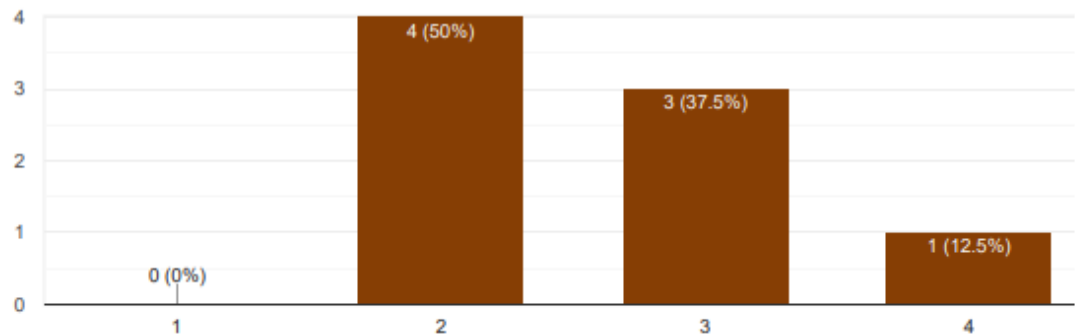
3. Relative to other programs, how well does PLC's YOUTH AND FAMILY MINISTRY contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



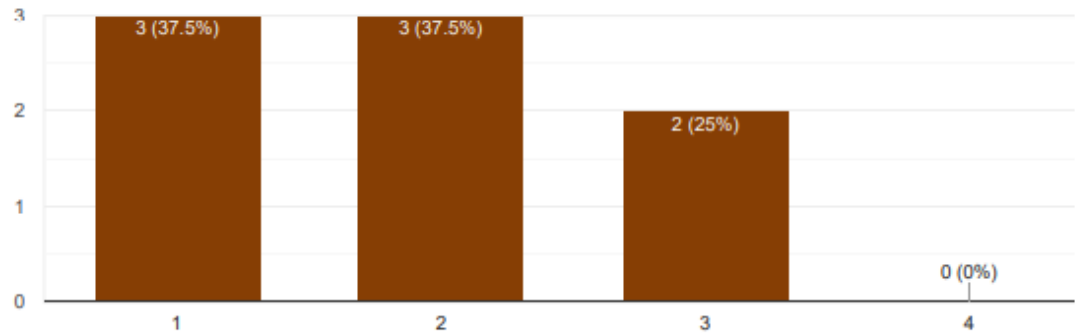
4. Relative to other programs, how well does PLC's OUTREACH AND EVANGELISM contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



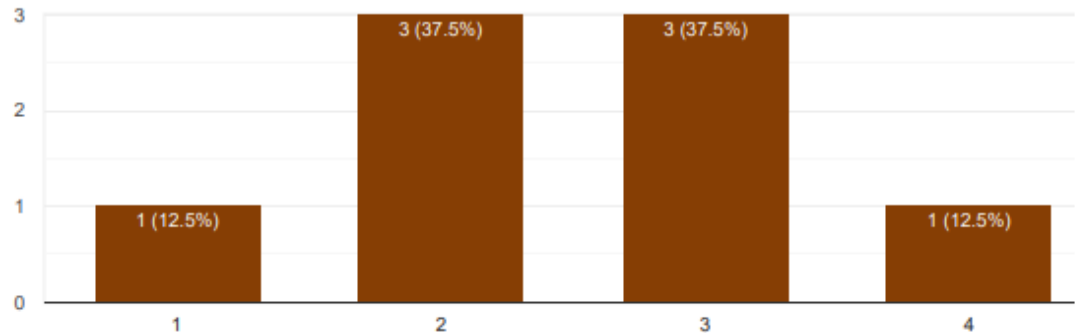
5. Relative to other programs, how well does PLC's STEWARDSHIP MINISTRY contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



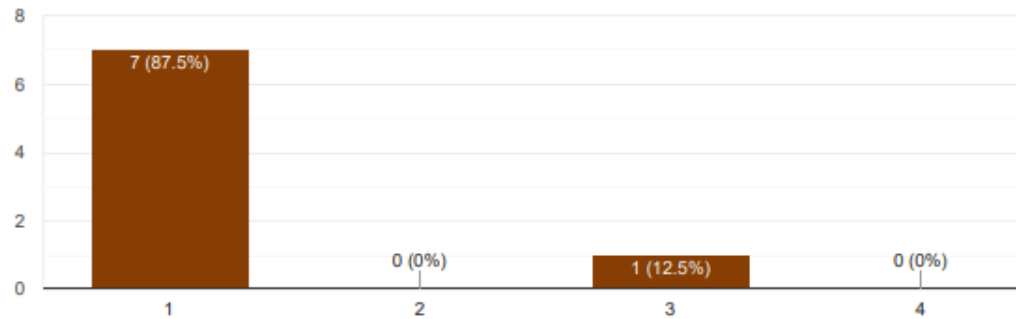
6. Relative to other programs, how well does REVIVE LA contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



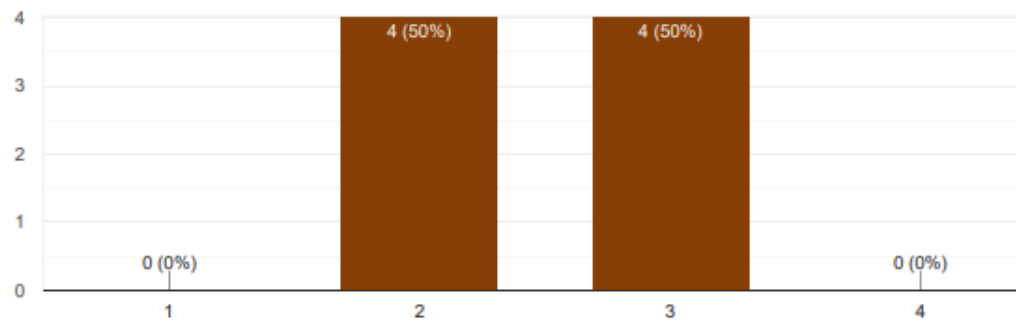
7. Relative to other programs, how well does STAR PRESCHOOL contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

8 responses



8. Relative to other programs, how well do the ELDERS contribute to PLC's overall mission to promote the Gospel of Jesus Christ?

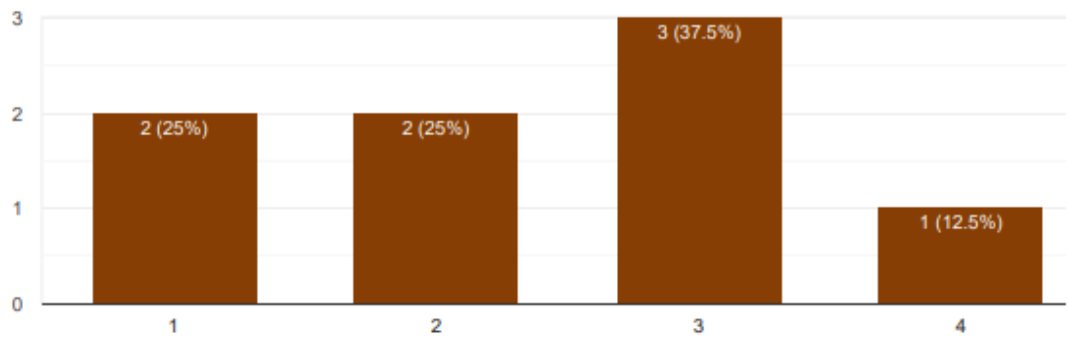
8 responses





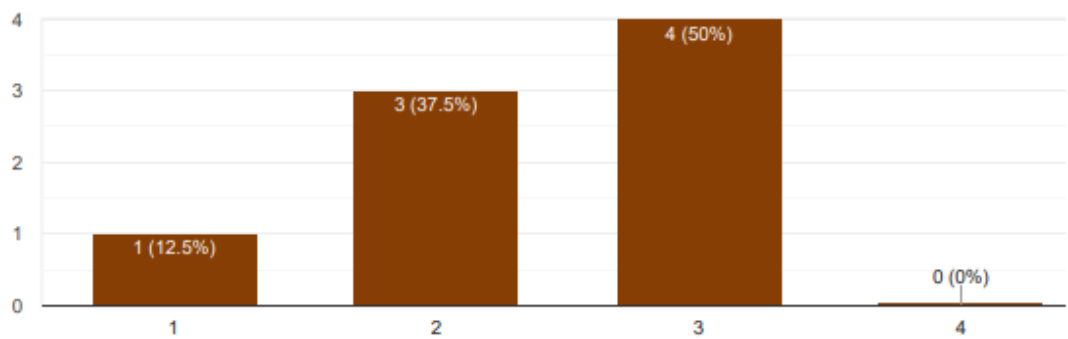
**B. 1. Is PLC's WORSHIP delivered in an exceptional manner?**

8 responses



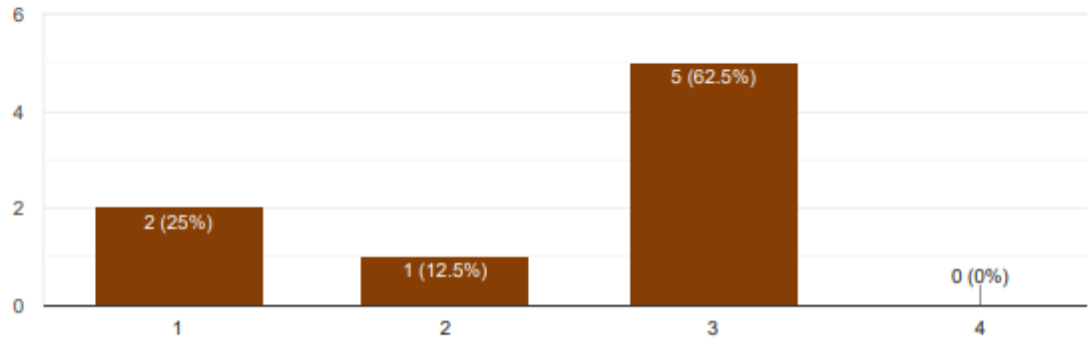
**2. Are PLC's BIBLE STUDIES delivered in an exceptional manner?**

8 responses



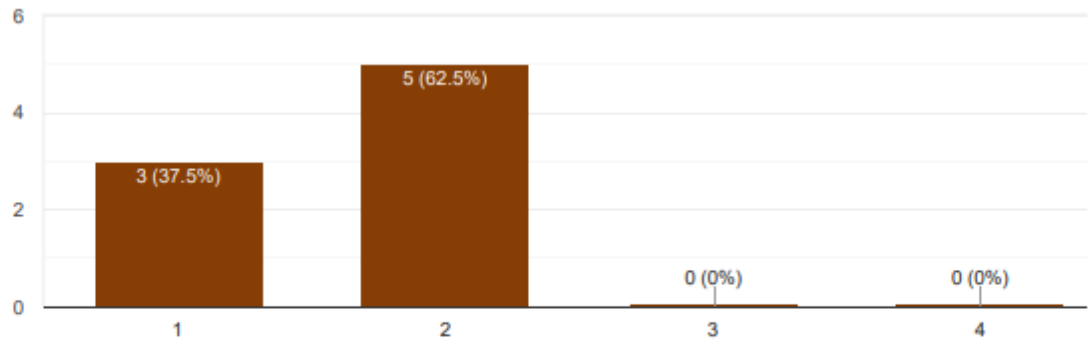
3. Are EVANGELISM AND OUTREACH at PLC delivered in an exceptional manner?

8 responses



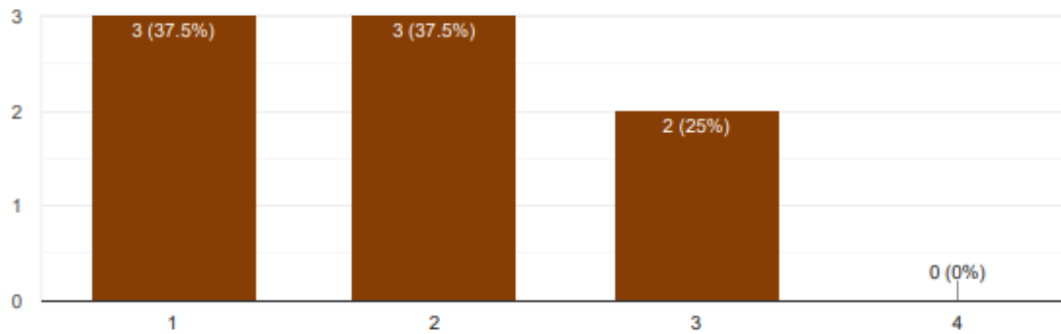
4. Are YOUTH AND FAMILY MINISTRIES at PLC delivered in an exceptional manner?

8 responses



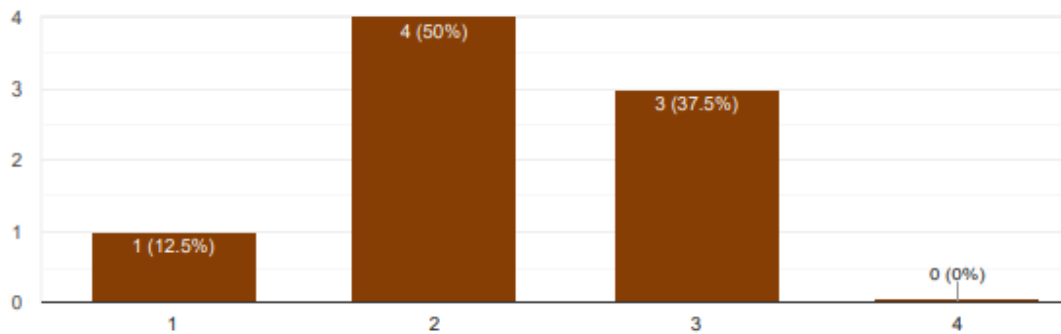
5. Is STEWARDSHIP at PLC delivered in an exceptional manner?

8 responses



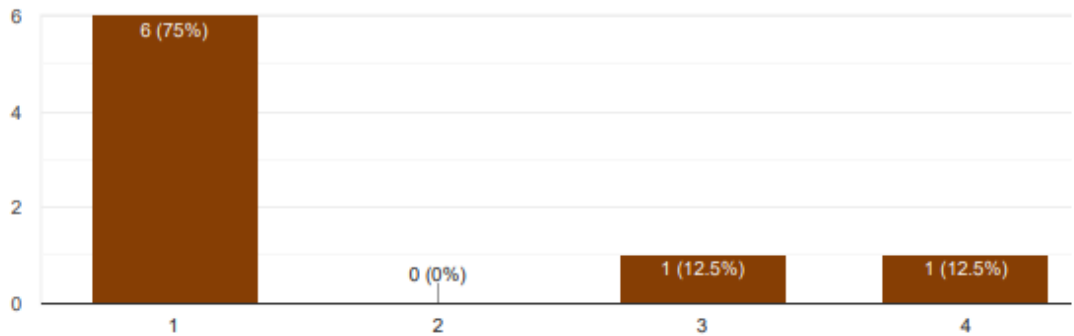
6. Is REVIVE LA delivered in an exceptional manner?

8 responses



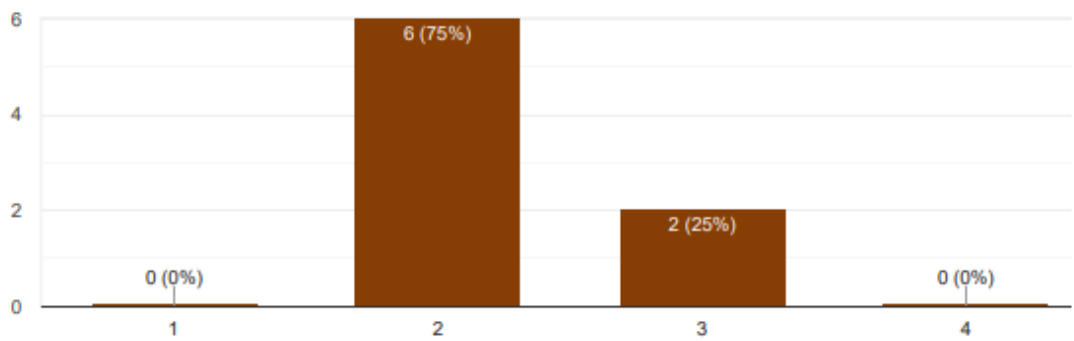
7. Is STAR PRESCHOOL delivered in an exceptional manner?

8 responses



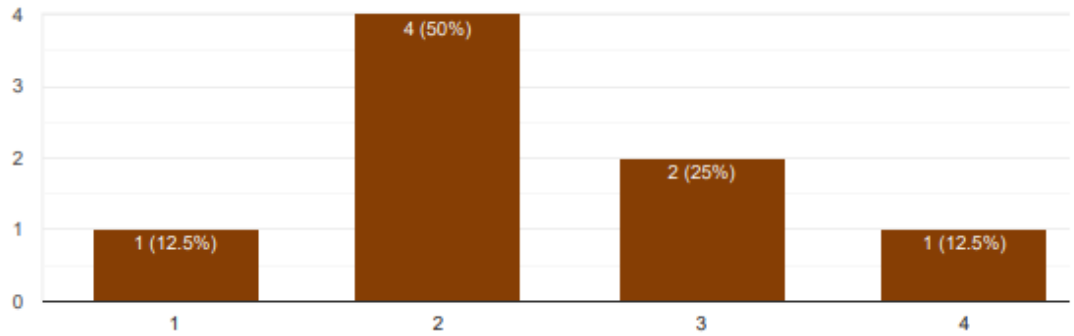
8. Is the ELDER MINISTRY delivered in an exceptional manner?

8 responses



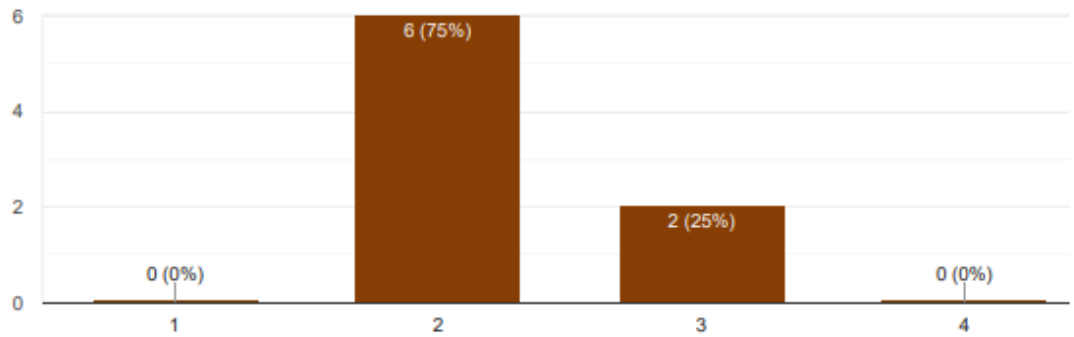
C. 1. Does PLC's WORSHIP MINISTRY build community around PLC Church as a whole?

8 responses



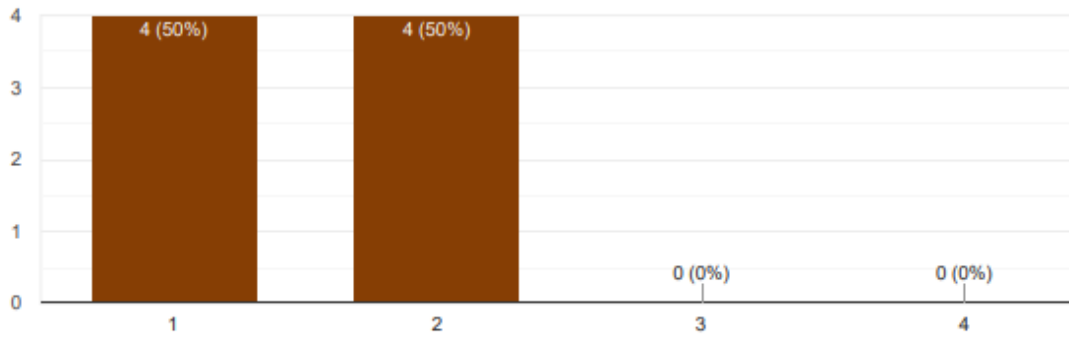
2. Does PLC's BIBLE STUDY MINISTRY build community around PLC Church as a whole?

8 responses



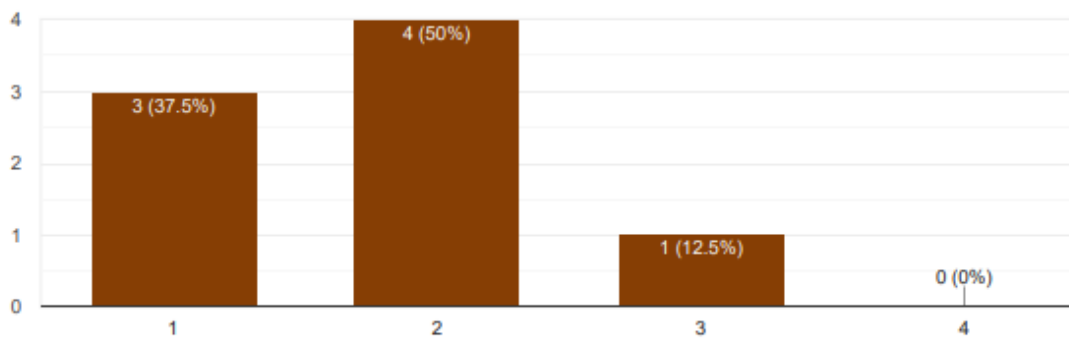
3. Does PLC's YOUTH AND FAMILY MINISTRY build community around PLC Church as a whole?

8 responses



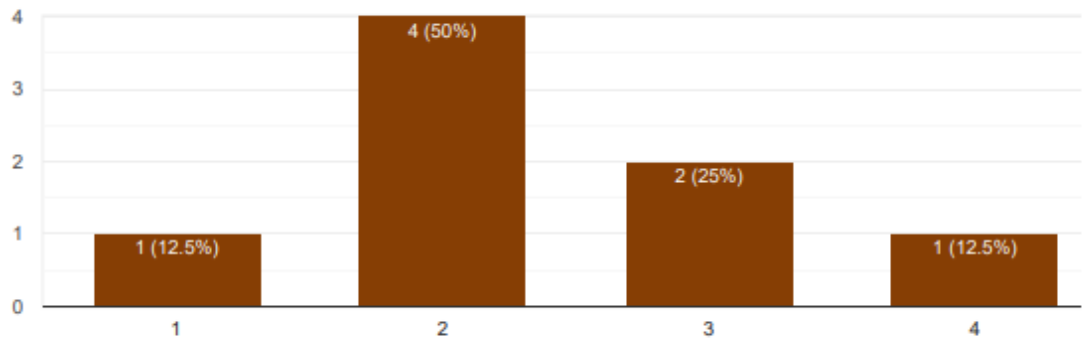
4. Does PLC's STEWARDSHIP MINISTRY build community around PLC Church as a whole?

8 responses



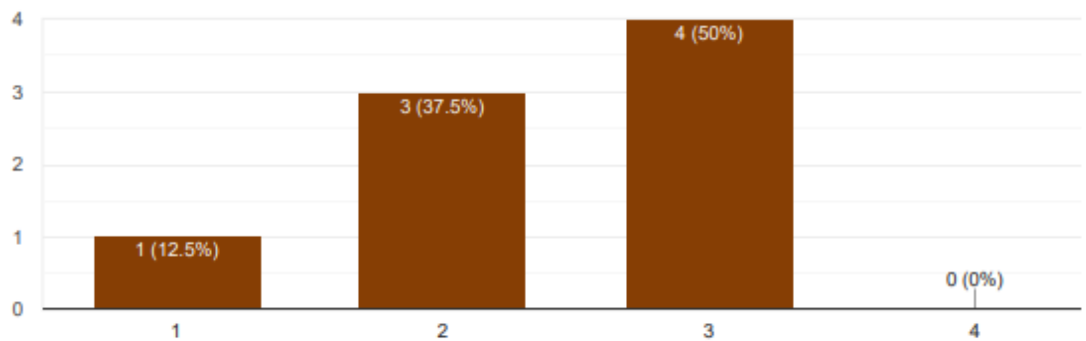
5. Does REVIVE LA build community around PLC Church as a whole?

8 responses



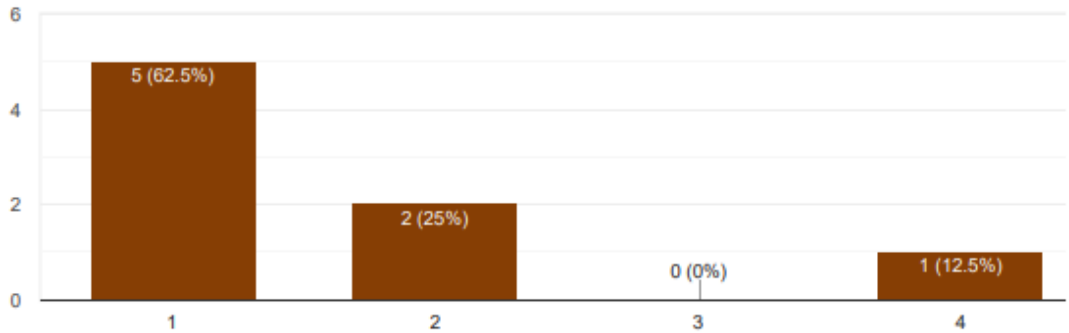
6. Does PLC's OUTREACH AND EVANGELISM MINISTRY build community around PLC Church as a whole?

8 responses



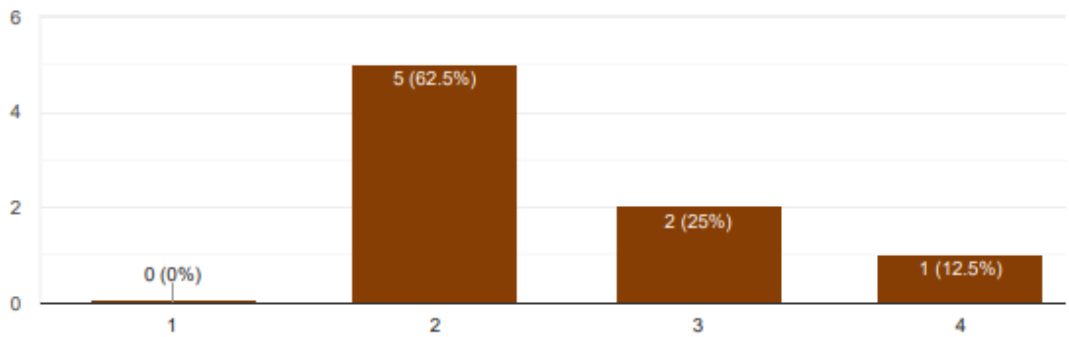
7. Does STAR PRESCHOOL build community around PLC Church as a whole?

8 responses



8. Does ELDER MINISTRY build community around PLC Church as a whole?

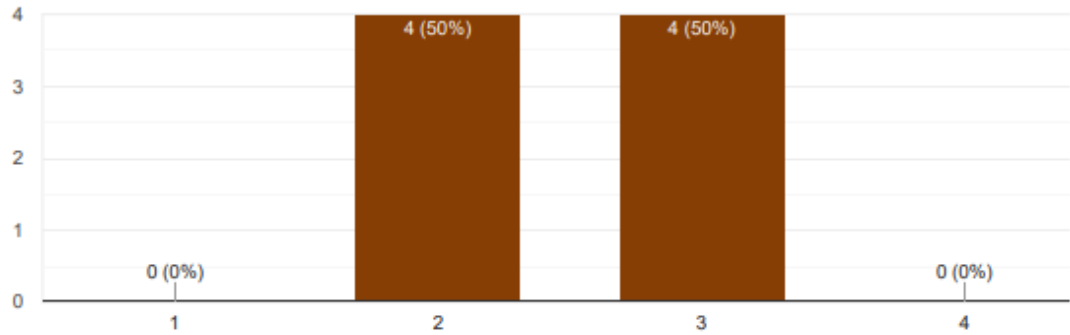
8 responses





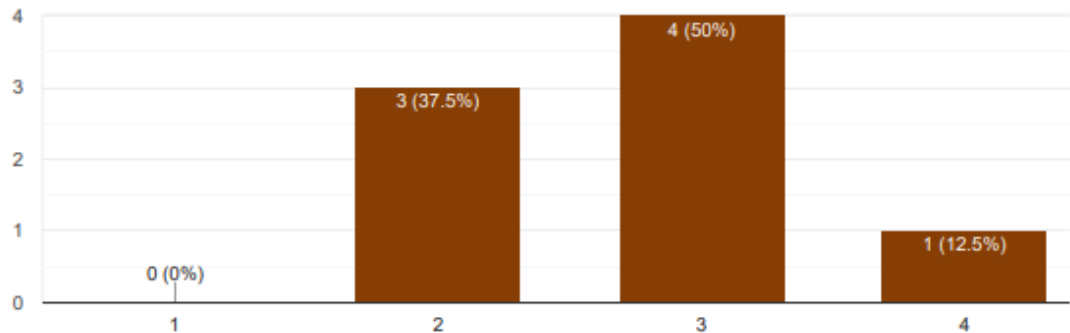
D. 1. Does PLC's WORSHIP MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



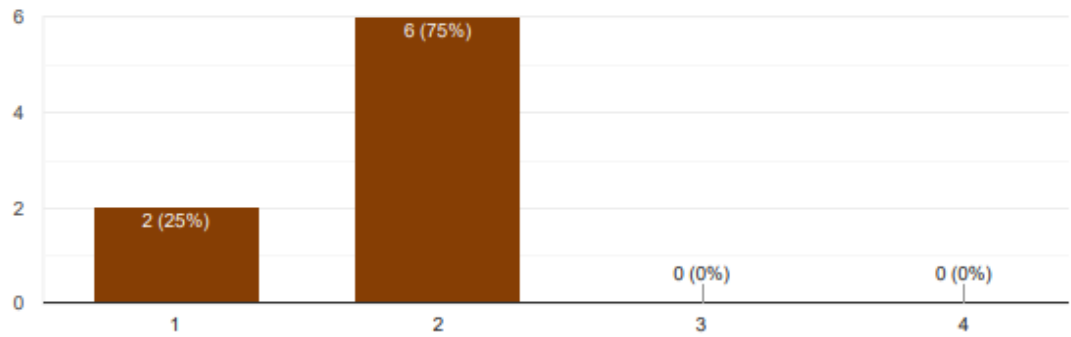
2. Does PLC's BIBLE STUDY MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



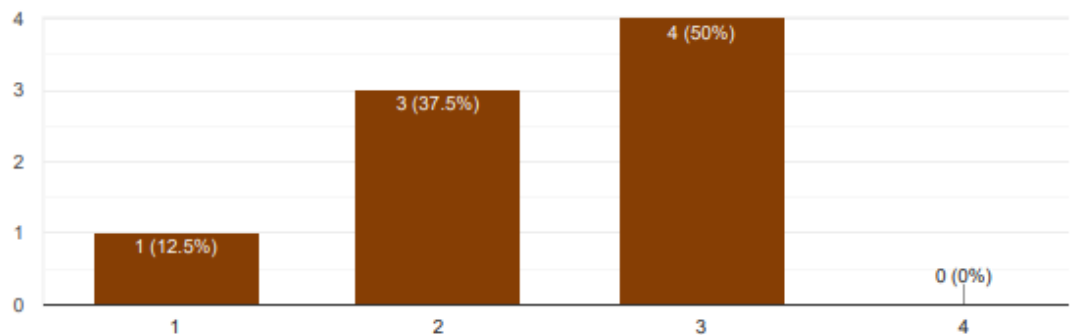
3. Does PLC's YOUTH AND FAMILY MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



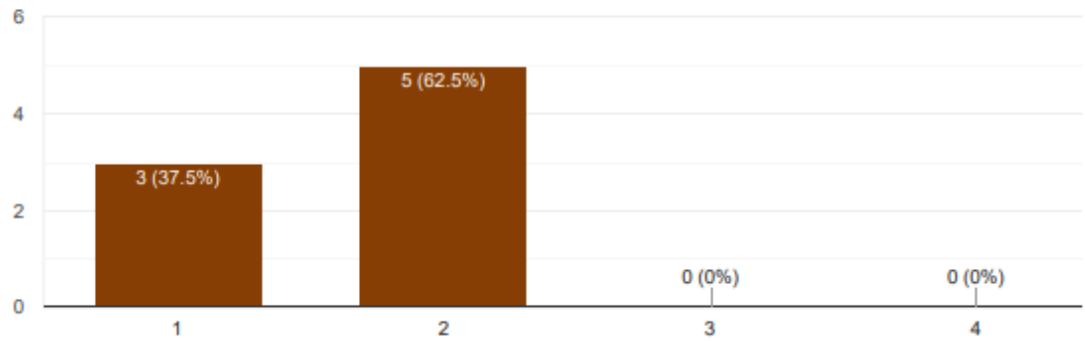
4. Does PLC's OUTREACH AND EVANGELISM MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



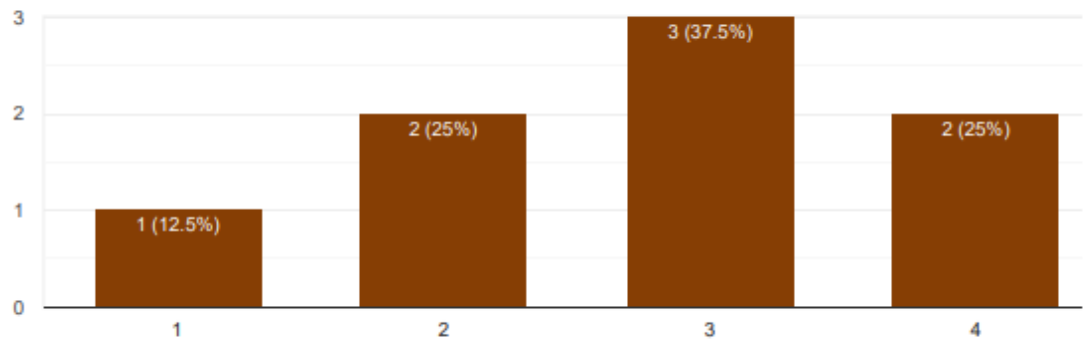
5. Does PLC's STEWARDSHIP MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



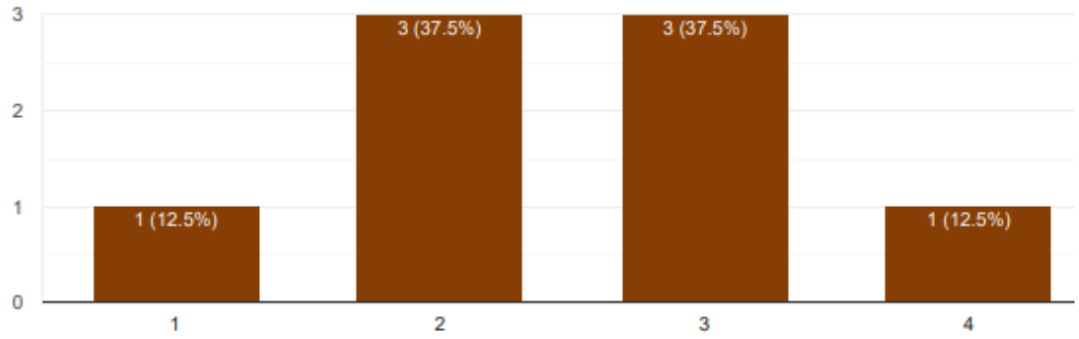
6. Does REVIVE LA MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



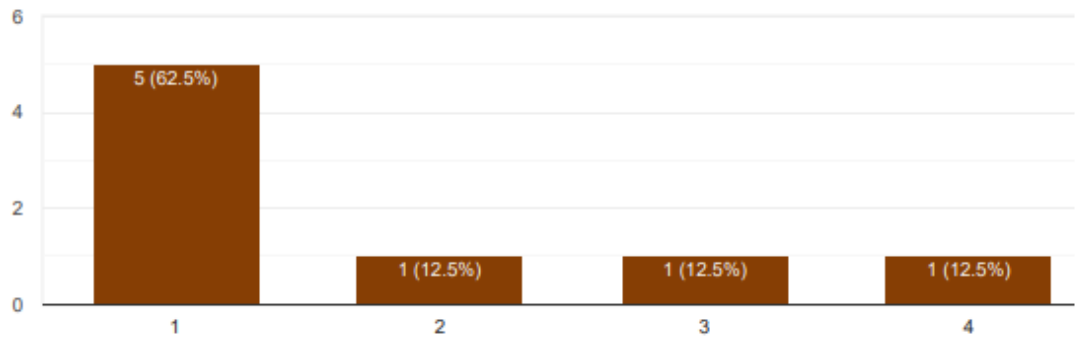
7. Does the ELDER MINISTRY benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



8. Does STAR Preschool benefit and nurture important relationships and partnerships inside and outside PLC for the benefit of PLC as a whole?

8 responses



## APPENDIX FIFTEEN

### GOSPEL IMPACT SURVEY RESULTS SCORED

Figure 12: Results of Gospel Impact Survey for Palisades Lutheran Church

<b>Gospel Impact and Stewardship Tool (GIST)</b>					Rev. Martin Lee, III
<b>Assessing Mission Impact</b>					
<p>On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.</p>					
Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	<i>Alignment with Core Mission</i>	<i>Excellence in Execution</i>	<i>Community Building</i>	<i>Leverage</i>	
Worship	2.5	2.5	2.4	2.5	2.5
Bible Study	3.0	2.5	2.3	2.8	2.7
Youth & Family	1.4	1.7	1.7	1.9	1.7
Outreach & Evangelism	2.7	2.2	2.5	2.5	2.5
Stewardship	1.8	1.9	1.6	1.6	1.7
Revive LA	2.6	2.0	2.5	2.7	2.5
Star Preschool	1.3	1.8	1.7	1.8	1.7
Elder	2.7	2.4	2.4	2.7	2.6

**Assessing Alignment with PLC's Gospel Impact (Goals for Mission, Vision, and Core Values)**

## APPENDIX SIXTEEN

### PLC TRUE COST DATA AND FINANCIAL DATA

Figure 13: Financial Data for Palisades Lutheran Church

<b>Gospel Impact and Stewardship Tool (GIST)</b>								Rev. Martin Lee, IIP	
	Worship	Bible Study	Youth & Family	Outreach & Evangelism	Stewardship	Revive LA	STAR Preschool	Elder	Total
Revenue	\$ 126,541.22	\$ 43,866.79	\$ 27,086.80	\$ 27,086.80	\$ 62,563.59		\$ -	\$ 27,086.80	\$ 314,232.00
Direct Expense	44,604.00	2,500.00	2,500.00	2,500.00	-	7,500.00	10,768.00	2,500.00	72,872
Shared Costs	69,318.69	24,029.23	14,848.61	14,848.61	34,287.55	23,167.09	2,149.35	12,393.51	195,043
Administration	11,461.50	3,972.29	2,454.42	2,454.42	5,667.77	3,830.18	10,765.00	2,454.42	43,060
<b>Total Expenses</b>	<b>125,384</b>	<b>30,502</b>	<b>19,803</b>	<b>19,803</b>	<b>39,955</b>	<b>34,497</b>	<b>23,682</b>	<b>17,348</b>	<b>310,975</b>
<b>Surplus / (Deficit)</b>	<b>\$ 1,157</b>	<b>\$ 13,365</b>	<b>\$ 7,284</b>	<b>\$ 7,284</b>	<b>\$ 22,608</b>	<b>\$ (34,497)</b>	<b>\$ (23,682)</b>	<b>\$ 9,739</b>	<b>\$3,257</b>

Notes:

1. In 2021 PLC has elected to subsidize two ministry as follows: Revive LA in the amount of \$34,497 and STAR Preschool in the amount of \$23,682.
2. **Revenue:** The amount of revenue allocated to each PLC-based ministry aligned with the amount of time each PLC staff member gave in support of that ministry.
3. **Direct Expenses:** Actual expenses incurred solely by this particular ministry or program or activity; including: labor, rental terms, etc.
4. **Shared Costs:** The amount of revenue allocated to each PLC-based ministry aligned with the amount of time each PLC staff member gave in support of that ministry.
5. **Administration Costs ("Overhead"):** 25% of Overhead Expenses were allocated to STAR Preschool (in addition to Utility expenses). Rationale: Occupancy is five (5) days per week and 100% of office space available to STAR Preschool at all times. 75% of other overhead expenses allocated to the six PLC-based ministries and Revive LA.

**Stewardship Calculator #1 - "True Cost" Data and Financial Analysis**

**APPENDIX SEVENTEEN**

**STEWARDSHIP CALCULATOR – STAFFING PLAN**

Figure 14: True Cost Calculations for Palisades Lutheran Church’s Ministries and Staffing

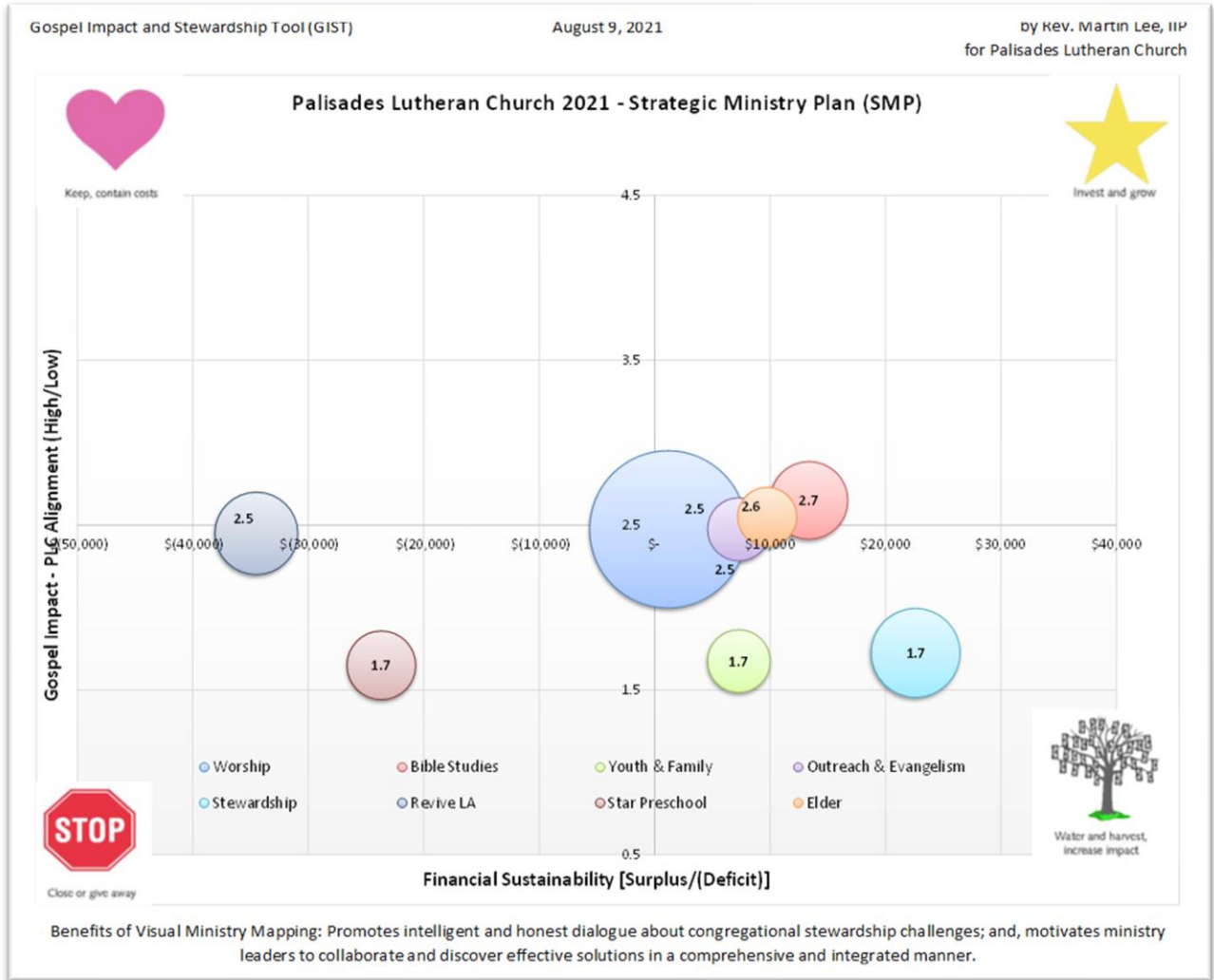
<b>Stewardship Calculator - Staffing Plan ("True Cost")</b>			
<b>Position/Hours:</b>	Pastor/32	<b>Salary:</b> \$ 147,500.00	
<b>Ministries</b>	<b>Hours</b>	<b>Percent of Time</b>	<b>"True Cost"</b>
Worship	12	31%	\$ 45,974.03
Bible Study	5	13%	\$ 19,155.84
Youth and Family	3	8%	\$ 11,493.51
Outreach and Evangelism	3	8%	\$ 11,493.51
Stewardship (admin.)	7	18%	\$ 26,818.18
Revive LA	5	13%	\$ 19,155.84
STAR Preschool	0.5	1%	\$ 1,915.58
Elder	3	8%	\$ 11,493.51
<b>Total:</b>	<b>38.5</b>	<b>100%</b>	<b>\$ 147,500.00</b>

<b>Stewardship Calculator - Staffing Plan ("True Cost")</b>			
<b>Position/Hours:</b>	Secretary/15	<b>Salary:</b> \$ 18,000.00	
<b>Ministries</b>	<b>Hours</b>	<b>Percent of Time</b>	<b>"True Cost"</b>
Worship	10	66%	\$ 11,880.00
Bible Study	0.75	5%	\$ 900.00
Youth and Family	0.75	5%	\$ 900.00
Outreach and Evangelism	0.75	5%	\$ 900.00
Stewardship (admin.)	1.5	10%	\$ 1,800.00
Revive LA	0.15	1%	\$ 180.00
STAR Preschool	0.45	3%	\$ 536.42
Elder	0.75	5%	\$ 900.00
<b>Total:</b>	<b>15.1</b>	<b>100%</b>	<b>\$ 17,996.42</b>

<b>Combined Staff - "True Cost"</b>	
Worship	\$ 57,854.03
Bible Study	\$ 20,055.84
Youth and Family	\$ 12,393.51
Outreach and Evangelism	\$ 12,393.51
Stewardship	\$ 28,618.18
Revive LA	\$ 19,335.84
STAR Preschool	\$ 2,452.01
Elder	\$ 12,393.51
<b>Total:</b>	<b>\$ 165,496.42</b>
<b>2021 Approved Budget:</b>	<b>\$ 314,232.00</b>
<b>Staff Percent of Budget:</b>	<b>53%</b>

# APPENDIX EIGHTEEN

## PLC'S GIST MINISTRY MAP
















**APPENDIX NINETEEN**

**GOSPEL IMPERATIVE DECISION TABLE**

Figure 15: Ministry Imperatives based on Gospel Impact Survey

PLC CORE MINISTRIES	QUADRANT	GOSPEL IMPERATIVE ("Relative")	ACTION
Worship	 	Keep. Contain costs. Invest grow, increase Gospel impact.	TBD
Bible Study		Keep. Contain costs. Invest and grow.	TBD
Youth and Family		Water harvest and increase Gospel impact.	TBD
Outreach and Evangelism	 	Keep. Contain costs. Invest and grow, increase Gospel impact.	TBD
Stewardship		Water harvest and increase Gospel impact.	TBD
Revive LA	 	Close or give away. Keep. Contain costs.	TBD
STAR PreSchool		Close or give away.	TBD
Elders		Keep. Contain costs. Invest and grow.	TBD

## APPENDIX TWENTY

### GIST GIST LEADER'S EVALUATION SURVEY

8/10/2021

Gospel Impact and Stewardship Tool (GIST) Ministry Map - Leader's Evaluation Survey

# Gospel Impact and Stewardship Tool (GIST) Ministry Map - Leader's Evaluation Survey

Dear PLC Leader,

Thank you for taking the time to participate and now complete this final survey in partial completion of my Doctor of Ministry Major Applied Project (MAP) at Concordia Seminary. The purpose of assessing gospel impact and financial viability (a "dual bottom line" approach) of PLC ministries is to promote alignment among PLC's eight core activities, resources, and strategic ministry goals; while also, to foster congregational dialogue and learning opportunities for improved congregational stewardship.

The ten (10) survey questions are categorized into four research groups: two theological, three organizational, three relational, and two programmatic. The set of 10 questions is intended to evaluate the usefulness of the GIST Ministry Map to increase dialogue, and promote new ways of understanding the gospel impact and financial viability of PLC's ministries in an integrated manner.

The value of this stewardship project will be evaluated on the ability to organize and interpret the data produced into achievable goals and recommendations for Palisades Lutheran Church.

Your assistance in this final research survey is much appreciated. It will help determine if this stewardship assessment tool should be developed further for use in the church at large.

\* Required

1. Email \*

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Researcher: Rev. Martin E. Lee, M.Div.

Title: Student, Doctor of Ministry

Location: Palisades Lutheran Church, California

The Purpose: This research project will assess what congregational stewardship knowledge and practices may be improved on for greater vitality and sustainability.

Reason for conducting research: To provide a congregational stewardship assessment of alignment of ministry efforts for Gospel impact and financial health.

Member of Palisades Lutheran Church.

Selection Process: You were selected because you are listed as a member of Palisades Lutheran Church.

Description of What Participant is to do: Complete to the best of their ability the survey questions.  
Length of time participation will take: 30 minutes to 45 minutes.

How anonymity will be protected: Any names will be altered for purposes of protecting individual identities.

How information will be protected: All digital data from this research project will be stored on my password protected laptop computer. Hard copies of all data (to include consent forms, transcriptions of interviews, surveys) will be stored in a secure, locked file cabinet at my home office.

Benefits to Participants: Benefits may be realized by Palisades Lutheran Church, not necessarily by individual members. Positive outcomes may result from this project, including reaffirming the mission and vision, promoting unity around sharing the mission and vision between ministries, and highlighting opportunities to align human, facility, and financial resources.

Risks to Participants: The only foreseeable discomfort would be in the process of self-reflection. That is, issues may rise that highlight areas of dissatisfaction with the current state of the congregation's stewardship.

Assurance of Voluntary Participation: Your records will be kept confidential and will not be released without your consent except as required by law.

Your identity will be kept private. If the results of this study are written in a theological or scientific journal, or presented at a professional or scientific meeting, your name will not be used. The data will be stored in a locked file cabinet. Your digitally signed consent form will be stored in a cabinet separate from the data. Any interviews with audiotape will be transcribed without any information that could identify you. And recordings will then be erased [or destroyed].

Assurance that withdrawing from the research has no consequences: Your decision to take part in this research study is entirely voluntary. You may refuse to take part in, or you may withdraw from the study at any time without penalty or loss of benefits to which you are normally entitled. You may leave the study for any reason.

Statement of Your Consent:

I have read the above description of this research study. I have been informed of

**Informed  
Consent/Assent  
Document**

8/10/2021

Gospel Impact and Stewardship Tool (GIST) Ministry Map - Leader's Evaluation Survey

the risks and benefits involved, and all my questions have been answered to my satisfaction. Furthermore, I have been assured that any future questions I may have will also be answered by the researcher. By submitting my name, email address and answers I am voluntarily agreeing to take part in this study. I understand I will receive a copy of this consent form sent to my email.

As a participant you will be able to receive copies of your answers on request.

You can reach the researcher, Martin E. Lee at: 517-755-8770.

Should you have any questions or concerns you can contact Martin E. Lee's supervisor, Rev. Dr. David Peter at: 314-505-7101.

For further assistance please contact Rev. Dr. Mark Rockenback, Director of Doctor of Ministry program at Concordia Seminary. Dr. Rockenback can be reached for questions or concerns at: 314-505-7109.  
Concordia Seminary, 801 Seminary Place, St. Louis, MO 63105.

Getting Started

Your personal identifying information will be kept private and confidential. As noted in Section 2 of 4, regarding participant risks, "The only foreseeable discomfort would be in the process of self-reflection. That is, issues may rise that highlight areas of dissatisfaction with the current state of the congregation's stewardship." If any question is too uncomfortable please type in as much and skip to the next question. These questions are challenging in order to learn the most and be a blessing to PLC's future ministry. I pray the best for PLC, each of you, and your next settled pastor. Thank you again for your participation.

2. Name \*

\_\_\_\_\_

3. Email \*

\_\_\_\_\_

Leader's Survey Questions

Please complete the following questions.

4. 1) (Programmatic) All six PLC-based ministries are weighted towards the "Money Tree" quadrant, while the two "partnership" ministries (STAR Preschool and Revive LA) are weighted towards the "Heart" and the "Stop Sign". PLC is funding these eight ministries with time, talent and resources but believes they should have greater gospel impact. What might be reasons these ministries are not achieving desired impact? (Remember, gospel impact was scored based on four criteria: alignment with PLC's mission/vision, execution with excellence, community building, and leverage.) \*




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5. 2a) (Programmatic) Many churches will have a few ministries they execute exceptionally well relative to the other ministries. If you could select from the six PLC and two partnership ministries three or four ministries which would you give priority staff support and funding to promote exceptional execution? \*



Check all that apply.

- Worship
- Outreach & Evangelism
- Youth & Family
- Bible Study
- Revive LA
- STAR Preschool
- Stewardship
- Elders

6. 2b) Why did you select the three or four ministries above? \*

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7. 3) (Relational) A further concern raised from the GIST ministry map is what will the ministry relationship between PLC and Revive LA look like. Is the current ministry model sustainable? (Yes/No. Explain.) What would you envision in the next 3, 5, and 10 years? \*

Gospel Impact and Stewardship Tool (GIST) Rev. Steve Lee, 2017

	Ministry	Miss. Study	Teach. & Equip.	Outreach & Evangelism	Discipleship	Revive LA	Other	Total
Revenue	\$118,241.22	\$41,046.71	\$27,866.93	\$7,236.30	\$2,042.28	\$	\$27,866.93	\$274,202.38
Direct Expenses	\$6,252.58	\$2,282.91	\$2,282.91	\$228.28	\$	\$2,042.28	\$2,282.91	\$13,088.91
Shared Costs	\$6,252.58	\$2,282.91	\$2,282.91	\$228.28	\$	\$2,042.28	\$2,282.91	\$13,088.91
Administrative	\$7,407.32	\$2,672.32	\$2,672.32	\$267.23	\$	\$2,672.32	\$2,672.32	\$15,691.54
Total Expenses	\$16,912.50	\$7,238.14	\$7,238.14	\$723.79	\$	\$7,238.14	\$7,238.14	\$49,450.15
Net Profit (Deficit)	\$	\$33,758.60	\$20,584.82	\$6,512.51	\$2,042.28	\$	\$20,584.82	\$124,752.23

**Notes:**

- In 2021 PLC has decided to reduce its ministry as follows: Revive LA to the amount of \$20,000 and other ministries to the amount of \$2,000.
- Revenue: The percent of revenue allocated to each PLC based ministry is equal to the percent of the total staff member given in support of that ministry.
- Shared Expenses: A total expense amount given to the particular ministry is program or activity including labor, rental items, etc.
- Shared Costs: The amount of indirect expenses allocated to each PLC based ministry is equal to the amount of the total staff member given in support of that ministry.
- Administrative Costs (Overhead): 20% of total indirect expenses were allocated to PLC based ministries (to include in 2021 expenses). Remaining company is for 2021 staff per month and 100% of office space available to PLC based ministries at all times. 20% of other overhead expenses allocated to the on-site administrative activities.

Stewardship Calculator 01 - "True Cost" Data and Financial Analysis

You may have to magnify your screen to view the image.

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8. 4) (Relational) A further concern raised from the GIST ministry map is what will the ministry relationship between PLC and STAR Preschool look like. Is the current ministry model sustainable? (Yes/No. Explain.) What would you envision in the next 3, 5, and 10 years? \*

**Gospel Impact and Stewardship Tool (GIST)**

	Worship	Disc. PLC	Prch. & Pkng. Pr	Outreach & Evangelism	Ministry Trng	Revive LA	STAR Preschool	Other	Total
Revenue	\$120,341.20	\$42,064.70	\$27,060.00	\$2,300.00	\$2,000.00	\$ -	\$27,060.00	\$174,225.90	
Direct Expense	\$6,015.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$12,015.00
Shared Costs	\$5,710.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$13,710.00
Administration	\$7,800.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$13,800.00
<b>Total Expense</b>	<b>166,325.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>11,000.00</b>	<b>166,325.00</b>
Net Profit (Loss)	\$ -	\$11,064.70	\$16,060.00	\$300.00	\$1,000.00	\$ -	\$16,060.00	\$152,225.90	\$179,240.90

Notes:  
 1. In 2021 PLC has elected to subsidize its ministry activities through Revive LA to the amount of \$20,000 and STAR Preschool to the amount of \$10,000.  
 2. Revenue: The amount of revenue allocated to each PLC based ministry aligned with the amount of the each PLC staff member given in support of that ministry.  
 3. Direct Expense: Actual expense incurred solely by that particular ministry to program or activity including labor, rental, travel, etc.  
 4. Shared Costs: The amount of revenue allocated to each PLC based ministry aligned with the amount of the each PLC staff member given in support of that ministry.  
 5. Administration Costs ("Overhead"): 20% of Direct Expenses were allocated to STAR Preschool (in addition to 2000 expenses), Outreach Evangelism is \$20,000 per month and 100% of office costs available to STAR Preschool at all times. 10% of other overhead expenses allocated to the other PLC ministries/ministries as well.

Stewardship Calculator v1 - "True Cost" Data and Financial Analysis

You may have to magnify your screen to view the image.

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9. 5) (Relational) The pastors of Revive LA do not hold theological degrees. Some PLC members have reservations about Revive LA pastor's ordination status. What are your ordination and educational expectations for pastors called to serve PLC? \*

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10. 6) (Organizational) The "true cost" concept helps illustrate how critical it is to monitor staff support of the various ministries. Is the PLC pastor's current allocation across the six PLC ministries and two partnership ministries what you envisioned? How would you recommend improving the allocation for higher gospel impact? \*

<b>Stewardship Calculator - Staffing Plan ("True Cost")</b>			
<b>Position/Hours:</b>	Pastor/32	<b>Salary: \$ 147,500.00</b>	
Ministries	Hours	Percent of Time	"True Cost"
Worship	12	31%	\$ 45,974.03
Bible Study	5	13%	\$ 19,155.84
Youth and Family	3	8%	\$ 11,493.51
Outreach and Evangelism	3	8%	\$ 11,493.51
Stewardship (admin.)	7	18%	\$ 26,818.18
Revive LA	5	13%	\$ 19,155.84
STAR Preschool	0.5	1%	\$ 1,915.58
Elder	3	8%	\$ 11,493.51
<b>Total:</b>	<b>38.5</b>	<b>100%</b>	<b>\$ 147,500.00</b>

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- 11. 7) (Organizational) Were PLC to formally partner with STAR Preschool in ministry what would that look like? That is, to improve the overall "Gospel Impact" score how would you envision restructuring staff relations to create leverage of resources, ministry alignment, and improved execution? Is the current arrangement sustainable over the next 3, 5, and 10 years? \*

Assessing Gospel Impact

On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.

Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	Alignment with Core Mission	Excellence in Execution	Community Building	Leverage	
PLC's Bible Studies	3.0	2.5	2.3	2.8	2.7
PLC's Elder Ministry	2.7	2.4	2.4	2.7	2.6
PLC's Worship Ministry	2.5	2.5	2.4	2.5	2.5
PLC's Outreach and Evangelism	2.7	2.2	2.5	2.5	2.5
Revive LA	2.6	2.0	2.5	2.7	2.5
PLC's Stewardship Ministry	1.8	1.9	1.6	1.6	1.7
PLC's Youth and Family Ministry	1.4	1.7	1.7	1.9	1.7
Star Preschool	1.3	1.8	1.7	1.8	1.7

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12. 8) (Organizational) Were PLC to formally partner with Revive LA in ministry what would that look like? That is, to improve the overall "Gospel Impact" score how would you envision restructuring staff relations to create leverage of resources, ministry alignment, and improved execution? Is the current arrangement sustainable over the next 3, 5, and 10 years? \*

**Assessing Gospel Impact**

On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.

Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	Alignment with Core Mission	Excellence in Execution	Community Building	Leverage	
PLC's Bible Studies	3.0	2.5	2.3	2.8	<b>2.7</b>
PLC's Elder Ministry	2.7	2.4	2.4	2.7	<b>2.6</b>
PLC's Worship Ministry	2.5	2.5	2.4	2.5	<b>2.5</b>
PLC's Outreach and Evangelism	2.7	2.2	2.5	2.5	<b>2.5</b>
Revive LA	2.6	2.0	2.5	2.7	<b>2.5</b>
PLC's Stewardship Ministry	1.8	1.9	1.8	1.6	<b>1.7</b>
PLC's Youth and Family Ministry	1.4	1.7	1.7	1.9	<b>1.7</b>
Star Preschool	1.3	1.8	1.7	1.8	<b>1.7</b>

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13. 9) (Theological) Depending on a denomination's theological beliefs that denomination may or may not be in favor of Lutherans for Life, same-sex-unions, women's ordination, or how to address social and environmental justice issues. PLC leaders expressed to Pastor Lee and District President Mike Gibson that such differences do exist at PLC, and PLC is not satisfied with how the current incongruencies are being managed . It was explained the practice has been to simply avoid these denominational and doctrinal matters in order to avoid giving offense. The GIST ministry map may be picking up on this concern with all six PLC ministries just simply existing but not flourishing. How is PLC's dual denominational structure, with built in doctrinal differences, helping or hindering PLC's Gospel Impact? \*

**Assessing Gospel Impact**

On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.

Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	Alignment with Core Mission	Excellence in Execution	Community Building	Leverage	
PLC's Bible Studies	3.0	2.5	2.3	2.8	2.7
PLC's Elder Ministry	2.7	2.4	2.4	2.7	2.6
PLC's Worship Ministry	2.5	2.5	2.4	2.5	2.5
PLC's Outreach and Evangelism	2.7	2.2	2.5	2.5	2.5
Revive LA	2.6	2.0	2.5	2.7	2.5
PLC's Stewardship Ministry	1.8	1.9	1.6	1.6	1.7
PLC's Youth and Family Ministry	1.4	1.7	1.7	1.9	1.7
Star Preschool	1.3	1.8	1.7	1.8	1.7

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- 14. 10) (Theological) On the wall in the PLC narthex there is a poster board listing desired qualities in the next settled pastor. One of those qualities is the "Pastor should give relevant, Bible based sermons; ...". After pastoring two and one-half years at PLC the recently departed pastor explained, "If you are faithful to your denominational faith community [doctrine & belief] you will offend half the people half the time, or you are unable to faithfully preach and teach in line with your particular denomination. The dual denomination strategy is holding PLC back. But they do not want to talk about that." (Shared with permission from the departed pastor.) What do you think? Does the departed pastor have a reasonable concern? Is it possible ministry efforts are unintentionally working at cross-purposes and out of alignment? \*




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Google Forms

## APPENDIX TWENTY-ONE

### GOSPEL IMPACT SURVEY CRITERIA

#### **1. Alignment with Core Mission**

Over time, ministries may drift in core mission alignment. Hence, at any given time, some ministries are more aligned than others in Gospel impact. Most (or probably all) current ministries have some level of impact on individual participants, but there is room for discussion about whether these ministries are ever increasing (Eph 4:12-13) in alignment with the congregation's core mission to promote the Gospel of Jesus Christ.

#### **2. Excellence in Execution**

Often ministry programs will spend more explicit attention to planning than to execution. The criterion of excellence is a way of getting at execution. Is this ministry program something that the church-school offers in an outstanding, superior way? Do we execute this ministry program competently, or do we execute it amazingly well? The following are sources of information related to the criterion of excellence: Program evaluation data; Feedback from customers, patrons, and clients; and Direct observation; Staff performance evaluations; and Staff turnover and exit interviews.

#### **3. Community Building**

One measure of impact may be related to building the capacity and strength of the community – care ministries, spiritual growth, and mission field – rather than to building the organization itself. Does the ministry program help build the community around the church? The following sources may provide information related to the criterion of community building: Interviews with community and ministry leaders; Reviews of member support; and recent surveys.

#### **4. Leverage**

Ministry programs, of course, do not exist in isolation. One element of impact is leverage, the degree to which a ministry program increases the impact of other ministry programs. A ministry may score high on the criterion of leverage because it creates opportunity for evangelism, member and visitor assimilation, youth engagement, volunteer participation, worship attendance or increased offerings.



## APPENDIX TWENTY-TWO

### IIM 30-DAY REPORT

Palisades Lutheran Church, LCMC-LCMS, March 1, 2021

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### IIM 30-Day Report

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Dear Members of Palisades Lutheran Church,

Thank you for the warm welcoming basket and cards. You have been truly kind in assisting us to settle into a new community. We arrived Saturday, January 29, 2021 and began ministry together on Monday, February 1, 2021. It is now 30 calendar days since our journey here began. I have met with over 20 individual members out of the average weekly attendance of 50 (from the annual report). I still hope to meet with two-thirds of the congregation. That means 14 more PLC members need to schedule a meeting with me within the next 4 weeks.

#### Purpose

Intentional Interim Ministry (“IIM”) is provided for the unique time between pastors both to *repair* from past experiences and to *prepare* for the future. My role as your intentional interim pastor is like John the Baptist: I assist congregations to receive their new shepherd. The process begins by assisting congregations to better understand who God has called them to be, where God has called them to go, and how God has equipped them to get there. Depending on what PLC learns, PLC will be better prepared to receive a new settled pastor. Each stage in the congregational life cycle and each size category qualification may require a differently gifted pastor and/or governance model.

#### Challenges Ahead

In the one-on-one meetings to date, PLC members have noted disconnection, confusion, over-reaching, and even some past conflict due to the many, separate ministry efforts and associated informal relationships, ministry descriptions, and expectations. A few examples noted by PLC members of these separate ministry efforts include the STAR Preschool, Revive LA, and LCMC/LCMS membership. PLC members are curious if it will be possible to agree on a unified vision for ministry so that finite ministry resources (including human capital) can be in alignment under a common mission. Key to illustrating and addressing unification concerns will be participation in diagramming the congregation’s “current state” organization-ministry chart.

An additional opportunity for insight and learning is in understanding the implications of congregational life cycle theory in PLC’s current- and future-state planning. Once PLC can place herself on the life cycle arch, members will better know which of the below life cycle interventions may be most useful: renewal, revitalization, redevelopment, or redemptive death. When asked which congregational life cycle stage(s) PLC most reflects, many respondents indicated they thought the congregation’s current state was in either the “Adolescence” or “Old Age” stage. Participation in the one-on-one interview questions will help place PLC on the life cycle arch for life cycle intervention.

# Palisades Lutheran Church, LCMC-LCMS, March 1, 2021

If you have not already, please schedule your one-on-one interview with me so your voice can be heard and reflected in this learning process.

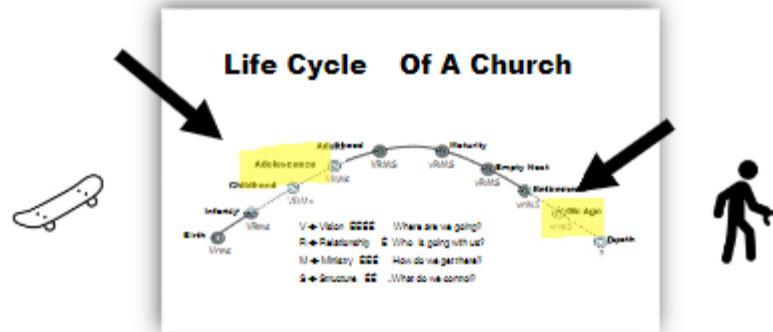
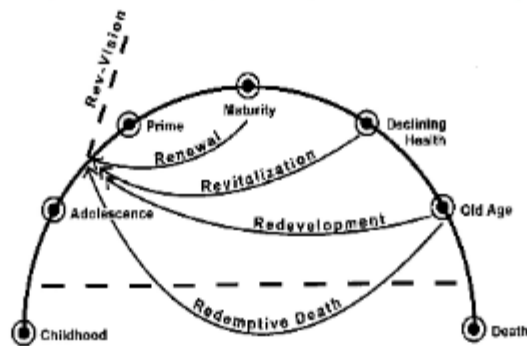


Figure 1 - Congregational Life Cycle Theory



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Rev. Martin E. Lee, IIP  
Intentional Interim Pastor



## APPENDIX TWENTY-THREE

### IIM TWO MONTH REPORT, APRIL 14, 2021

#### Palisades Lutheran Church, LCMC-LCMS, April 14, 2021

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## Pastor Lee's April 14, 2021 IIM Report

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Dear Council Members,

Easter Blessings! He is Risen. He is Risen indeed, Hallelujah! This brief report marks 2.5 months from the start date of the Intentional Interim Ministry (IIM) at PLC. The **Joining Phase** (months 1 – 3) is on track accordingly. PLC is now entering the **Learning Phase** (months 4 – 9). The Learning Phase will be kicked off by the 1<sup>st</sup> Quarter Report I hope to deliver by April 30. (The **IIM Process Map** which outlines the twelve-month timeline is published on the church website under the dropdown menu titled: "IIM Info".)

In the Learning Phase, a select group of PLC members will lead the congregational self-study. Much of the self-study will be based on the findings of the all-important one-on-one interviews. The individual contributions from PLC members are the primary resource in framing the topics of most importance for the study. Another highlight during this first quarter has been defining church office staff duties and responsibilities. A position description for the church secretary was developed. Wonderful conversation has begun about the division of labor among the Council, Ministry Teams, and church staff.

What a joy it has been to worship with you during Lent and now in the Easter season! As our Savior's resurrection reminds us of God's power and desire to restore life, we can be encouraged for our church, family, and world. Our hope is built on nothing less than Jesus' blood and righteousness. The Ragman has taken our old rags. He has taken PLC's old rags. And He has dressed us in new rags of righteousness.

Blessings in Christ,  
Pastor Lee

### Tasks Completed

1. One-on-One Interviews – 42 (tbc)
2. Meeting with Pastors RZ Meyer and Kenneth Davis
3. Congregational Systems Inventory (CSI) – 10 (tbc)
4. Gospel Impact and Stewardship Tool (GIST) – 8 (tbc)
5. Secretary Job Description approved and signed.
6. Church Office Assistant Title approved
7. Elder Discipleship and Leadership Training approved

## Palisades Lutheran Church, LCMC-LCMS, April 14, 2021

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### Active Tasks – New/Outstanding

1. Transition Task Force (TTF) Member Selection – Please secure six TTF members **by Saturday, May 1, 2021.**
2. Church Office Assistant Position Description
3. 10-Years of PLC Financials and Average Weekly Attendance Statistics
4. 1<sup>st</sup> Quarter Report
5. Elder Discipleship and Leadership Training
6. Meeting with Pastor Perry Fruhling, LCMS Coordinator for Pastoral Ministry

### Challenges Ahead

1. Leadership Participation
2. Membership Participation
3. Staffing

APPENDIX TWENTY-FOUR

1<sup>ST</sup> QUARTER REPORT, MARCH 7, 2021

# Palisades Lutheran Church 1st Quarter Report & TTF Resource Guide

**MAY 7, 2021**

**Palisades Lutheran Church, LCMC & LCMS**

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*“...Let us throw off everything than hinders...and run the race marked out for us.” (Hebrews 12:1)*



Figure 1 – Making space for all God’s Ministries to Catch a Wave at PLC!



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## ICON KEY



The “**Chi-Rho**” icon is meant for encouragement. These appear wherever there is an opportunity for God’s redemptive work in comforting, instructing, or healing. These activities of God will be highlighted in “**RED**” font.



The “**Explorer**” icon appears when there is a “Learning Moment”: an opportunity to investigate new ideas and explore new ways of thinking. The Explorer highlights moments when the congregation may want to climb into the balcony and assume a research posture.



The “**Tack**” icon appears wherever there is a task to complete. The task will be underlined. The work may “belong” to a ministry team, congregational leaders, the whole congregation, or others. Often, the primary work of the church is repentance and forgiveness.



The “**Folder**” icon appears wherever the report is referring to Pastor Lee’s personal notes from meetings, interviews, or learning he has received from the congregation over these last 90 days.

## INTRODUCTION


### Purpose

Intentional Interim Ministry (IIM) is provided for the unique time between pastors both to *repair* from past experiences and to *prepare* for the future. IIM includes perspectives that are derived from systems thinking and organizational learning and stewardship. The only persons who can make fundamental change in a system are the people involved in the emotional process themselves. Although the Intentional Interim Pastor (IIP) has adaptive leadership skills, tools, and techniques to encourage it, the change that needs to happen comes by God’s grace to the Congregation from the inside out – not from the outside in.<sup>1</sup> In preparing the IIM 1<sup>st</sup> Quarter Report, my objective is to be a faithful lens, describing the church as it is seen by the members – the themes and narratives that are important to you.

### Participation

Dear Members of Palisades Lutheran Church, thank you for your participation. It adds to the collective learning process. I arrived on Monday, February 1, 2021 and it has now been 3 months (at 4/5 time) since we began this journey together. Special thanks to Palisades Lutheran Church staff, lay-leaders, and members who have worked diligently to gather data, fill out surveys, attend focus group meetings, and provide proof reading<sup>2</sup> to deliver an accurate document for PLC’s congregational self-study and continued learning.

Content in the *1<sup>st</sup> Quarter Report* has been assembled from 51 one-on-one member interviews, three Council meetings, three Elder meetings, one Youth and Family Ministry Team meeting, six congregational Bible studies, four staff meetings, more than fifty telephone conversations and hundreds of texts and emails with individual members. The following internal documents and survey results have been consulted:

- 
- 1) **Palisades Lutheran Church By-laws** (“Most Recent Amendment June 4, 2017”).
  - 2) The STAR Preschool Agreement – 2020 – 2021 “At Palisades Lutheran Church.”
  - 3) **Palisadian-Post** – “**Out of the Past**” article, dated February 11, 2021.
  - 4) **Synthesis of all 5 Elders small group** meetings held in October and November 2019 and Elders summary delivered December 2019. (“Snapshot of history of PLC including

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<sup>1</sup> Rev. Peter Alexander, (Dean of Faculty, National Association of Lutheran Interim Pastors).

<sup>2</sup> “X” number of readers were invited to proof the document for accuracy, tone, and areas of improvement. Six of the seven readers provided feedback: two elders, one staff member, one board member, and two congregational attendees.

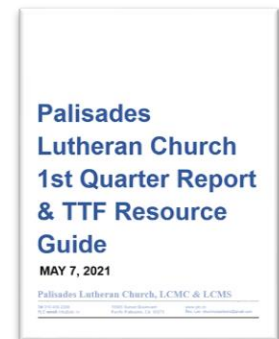


conflict history.”)

- 5) A Questionnaire of 12 questions from Rev. Kenneth Davis to Rev. Wally Mees.
- 6) An Update on Children’s Church from John Hellmuth dated March 1, 2021.
- 7) Desired Outcomes of Intentional Interim Ministry at PLC submitted by the Council and Elders on October 20, 2020 to Rev. Martin Lee, IIP and the Pacific Southwest District of the LCMS.
- 8) The LCMS Church 10-Year Statistics and Records for PLC.<sup>3</sup>
- 9) PLC’s annual income statements from 2011 – 2020 and PLC Financial Notes
- 10) Leadership Survey – Gospel Impact & Stewardship Tool (GIST) for strategic ministry planning.

## Document Summary

The *1<sup>st</sup> Quarter Report* is intended to be a resource for the members and stakeholders of Palisades Lutheran Church (PLC), the Pacific Southwest District (PSD) of the Lutheran Church—Missouri Synod (LCMS), and the Lutheran Congregations in Mission for Christ (LCMC). It will be used by the Transition Task Force (TTF) as the primary resource document for leading the congregational self-study (IIM Phase Two) over the next six months. In fact, it is now a historical document of PLC. This report is divided into two sections:



- ❖ **Section I: PLC Top 10 Concerns (ministry priorities)** – This is a major part of the report, making up nearly two-thirds. The structure is give-and-take. The members give their responses to various questions and receive adaptive feedback from IIP. This entire section is guided by the “Top 10” member concerns. Remember, **God promises** He is working through *“all things,”* withholding nothing, so that your joy might be made complete (John 15:11).
- ❖ **Section II: Recommendations** – In this section I recommend four topics for congregational learning. Together, we will seek to create communities of interest around these topics. Dr. Karl Albrecht observes, “The combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.” May God and His Word lead our thoughts and actions that we may *“throw off everything that hinders”* and *“run the race marked out for us.”* (Hebrews 12:1).

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<sup>3</sup> [Find LCMS Church - The Lutheran Church—Missouri Synod](#) .





Rev. Martin E. Lee, IIP  
Intentional Interim Pastor

## SELF-STUDY RECOMMENDATIONS SUMMARY (Transition Task Force Pull-Out Page)

### **RECOMMENDATION #1 – CHURCH GOVERNANCE AND LEADERSHIP** (pgs. 11 – 18)



Become aware of church governance options with leadership styles that make sense for PLC. Choose and implement the church governance model and leadership style, faithfully and in Christian love.

### **RECOMMENDATION #2 – STRATEGIC MINISTRY PLAN** (pgs. 22 – 30)



Identify a ministry Vision for PLC. Utilize the Gospel Impact and Stewardship Tool (GIST) to create a ministry map around PLC's core ministries. Facilitate group discussions to evaluate strategic imperatives, and vote on a strategic ministry action plan.

### **RECOMMENDATION #3 – SOCIAL AND ENVIROMENTAL JUSTICE (Doctrine & Practice)** (pgs. 31 – 36)



Review Appendix A and add a column for the LCMS. Study PLC's doctrinal and denominational identity. Study the Commission on Church Theology and Relations (CTCR) document titled: "Render Unto Caesar...Render Unto God: A Lutheran View of Church and State." Facilitate group discussions on the complexities involved in matters of conscience and to appreciate the similarities and differences between divine and social activism.

### **RECOMMENDATION #4 – UNRESOLVED ISSUES** (pgs. 38 – 46)



Identify and address patterns that prevent PLC from *coming to terms with history*. Facilitate conversation to aid in repairing from the past and preparing for the future. Work through the grief/change process in a positive and constructive manner so that healing may begin.

## PLC'S TOP 10 CONCERNS

Be confident and do not fear! “He will never leave you nor forsake you. Do not be afraid; do not be discouraged” (Deuteronomy 31:8). When addressing matters of concern for congregational members, it can get discouraging fast! We need to take a deep breath and remember that God is still God and knows what He is doing. Some members are ready for the roller coaster ride! One member commented: “Let them (The Palisades) know we’re alive.” The same person continued, “Be patient, calm, kind...clever?” concluding that PLC members can stay future-focused and hopeful.

To that encourager, we say: “AMEN!” God intends to redeem this time between settled pastors. So, buckle up! BIG Hairy Audacious (and Divine) Goals ahead!

When asked the one-on-one interview question, “What do you see as the three major concerns your congregation has during this pastoral transition?” the top six member responses were: *Declining Membership, Church Governance and Leadership, Financial Viability, Strategic Ministry Plan, Social Justice and Environment Issues, and Unresolved Issues.* The chart below reflects the cumulative responses.

God: "I have a plan for your life"  
What it feels like:



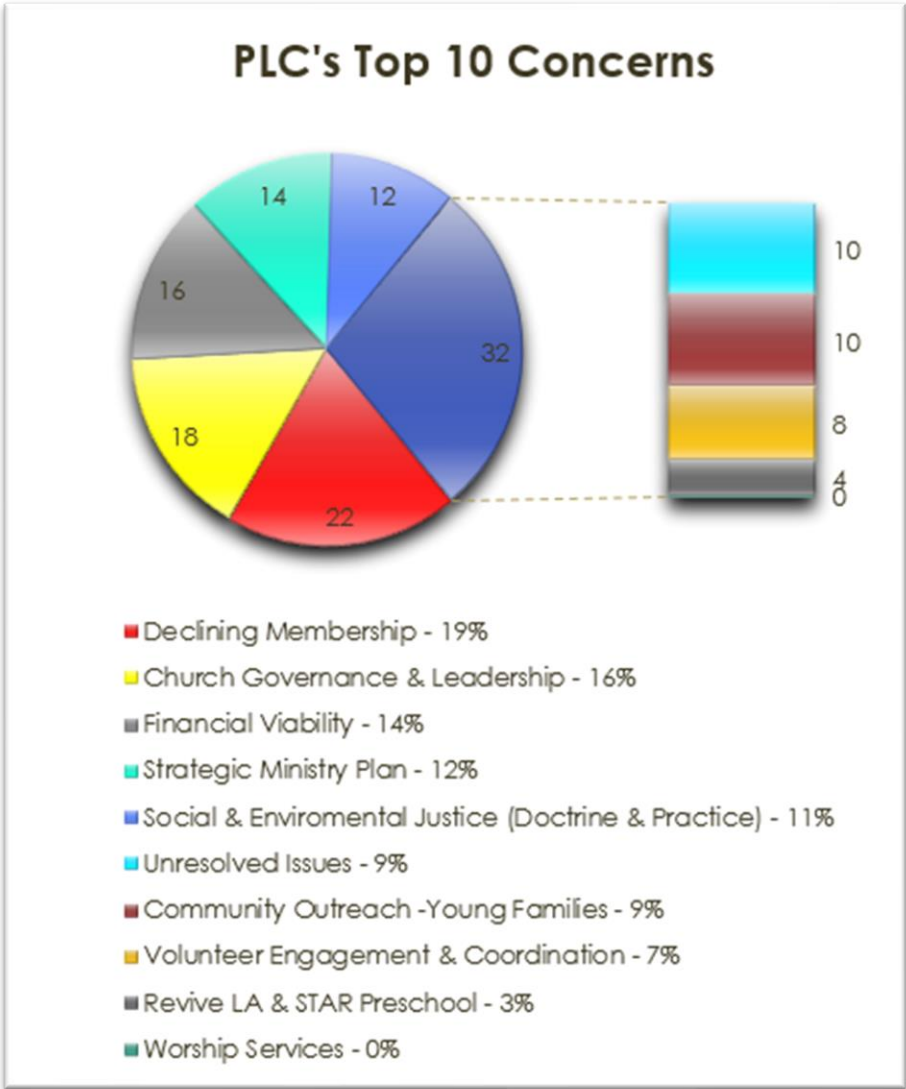


Figure 3 – PLC Member's Top 10 Concerns

## #1 – DECLINING MEMBERSHIP

### PLC MEMBER COMMENTS:

#### 16) Emotional Thermostat responses:

- **Three (3)** people responded: “Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.”
- **One (1)** person responded: “Very distressed; I’ll have to wait and see.”
- **Two (2)** people responded: “Feel very distressed: am participating in this process to help myself and our congregation with the healing that needs to be done.”
- **Five (5)** people responded: “Am moderately distressed about events at our church, yet...”
- **One (1)** person replied: “Am still somewhat upset, need healing time, but will continue to participate.”
- **Three (3)** people responded: “Am okay but will need time with new leadership.”
- **Five (5)** people responded: “Am okay about things and look forward to new leadership and mission.”
- **One (1)** person responded: “Doing quite well, thank you, and looking with excitement to our future mission.”

HOW ARE YOU DOING NOW?

10	Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.
9	Very distressed; I'll have to wait and see.
8	Feel very distressed: am participating in the process to help myself and our congregation with the healing that needs to be done.
7	Am moderately distressed about events at our church, yet.....
6	Am still somewhat upset, need healing time but will continue to participate.
5	Am okay, but will need time with new leadership.
4	Am okay about things, and look forward to new leadership and mission.
3	Doing quite well, thank you, and looking with excitement to our future mission.
2	
1	

COMMENTS

Figure 4 - Emotional Thermostat

17) “Stabilization of membership so we don’t lose more members.”

18) “We need to open up from being a country club like church to a missionary church that speaks to youth and young people.”

19) “Give me and my wife motivation to stay in PLC.”

20) “I need to feel comfortable and cannot do so with some members mindset.”

**21) “It is in trouble. A declining and aging congregation.”**

22) “The downward membership trend predates Pastor Davis.”

23) “Part of the pruning is God’s plan. We have to trust God.”

24) “Concerned about losing membership and keeping good people involved.”

25) “Growing an interested and eager participation of ‘new recruits.’”

26) **“I have rather bad feelings that we will not have a future.”**

27) “Very capable and devoted people, though numbers are dwindling. Excellent physical buildings and space.”

28) **“We need to move closer to 150 members than 50** (it would be ok to go to over 150 but I doubt it happens).”

29) “Uncertain about future. Membership has declined over the past 25 years.”

30) **“We are vibrant, diligent & very much alive, but also an aging group.** That said, we need to figure out how to attract members of all ages, adults & children alike.

### PASTOR LEE’S COMMENTS:



It was not easy finding the average weekly attendance numbers for the last 10 years. Most LCMS congregations submit an annual reporting form to the Rosters and Statistics Department of the LCMS, and these numbers are included in that report. When I called the District Office, I was informed PLC has not submitted the annual Congregation Statistics Report since 2014. The Pacific Southwest District of the LCMS recorded that in 2014 PLC reported an average weekly attendance of 90. The remaining years in the chart below are based on data gathered from leaders of PLC. Assuming these numbers are somewhat in the ballpark, PLC has experienced a 5.3% rate of decline over the last 10 years. One member noted this downward trend predates both Covid-19 and Pastor Kenneth Davis. PLC’s average weekly attendance decline over the past 10-years has outpaced the LCMS decline of nearly 2.5% over the same period.

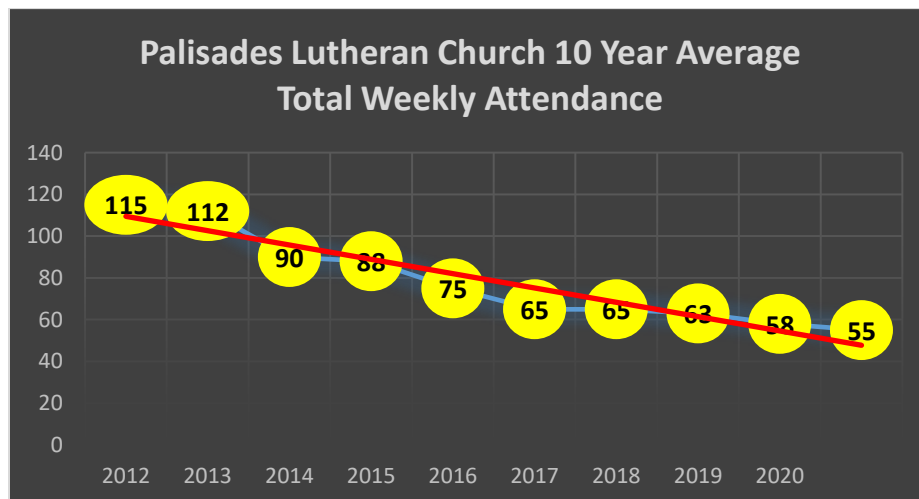


Figure 5 - PLC Average Weekly Attendance (AWA)

Like many professionals and small business owners, congregational leaders and their pastor(s) may unintentionally reduce the size of their congregation to a more comfortable and manageable fit for their spiritual, physical, and emotional capacities. More can be discussed on this point of



leadership and resource capacity during our cottage meetings.

Over the years, PLC has shifted between size categories. Table 1 illustrates the five size

Type	Average Sunday Attendance (total of all services)
Family	1-75
Pastoral	76-150
Transitional	151-225
Program	226-450
Resource	451+

Figure 6 - Congregational Size Categories

categories. The average weekly attendance in most churches in America is around 125, making most churches pastor sized. Currently, PLC would be classified as a family-sized church. During my short three months, this description fits how PLC functions as an organizational system. There are a few families and individuals who are the key influencers and have been for some time.

This is neither good nor bad. It is just a normal characteristic of a “family-sized” church. The presence, or influence, of “Mom and Dad” are felt throughout the family. In 2012, PLC would have been classified as a pastor-sized church. PLC would benefit from understanding why this transition to a smaller size category occurred. Was it due to contextual variables, church governance, staffing configuration, strategic mission-ministry drift, or something else?

PLC’s family-sized culture and leadership style will impact the congregation’s size going forward. Finding a healthy balance of shared leadership (e.g., delegating decision rights) will be key to future ministry for PLC if numeric growth is the Lord’s plan. Again, in family-sized congregations several family groups or “cliques” make most of the decisions and have access to most of the ministry resources. This is understood and accepted by both pastor and lay members. These congregations normally call pastors who are nearing, or in, retirement or fresh out of the seminary. It is hopefully understood by the congregation and pastor that the pastor’s “job” is that of a parish chaplain. They are to baptize, marry, bury, preach, teach, and do some visitation. But they are not to make significant ministry decisions. These decisions are left to the families. If both pastors and members understand their role, this arrangement is a blessing for the congregation.

Size category theory offers interesting insights on the changing role of the pastor. Some pastors can move comfortably up and down congregational sizes, while others are gifted for a specific congregational size and culture. It is helpful to point out that while a congregation may see themselves as wanting to be a “larger” size church, they may behave more like a “smaller” size church. It may be that the pastor and congregation are not in alignment with one another, or with the current congregational size, or with the desired future state. A simple review of size category theory may assist in identifying the incongruencies in lay leadership positions, staff position descriptions, staffing configuration, and church governance.

There is nothing wrong with being a “mom and pop” church. A big cultural difference is necessary to sustain a pastor-sized church. In pastor-sized congregations, the pastor tends to be the hub (the focal point) of leadership, more than a symbolic figure. Many lay people have concerns about pastors being given too much ministry oversight. Some think he/she might abuse power. Often these feelings are tied to past (unresolved) issues or experiences.

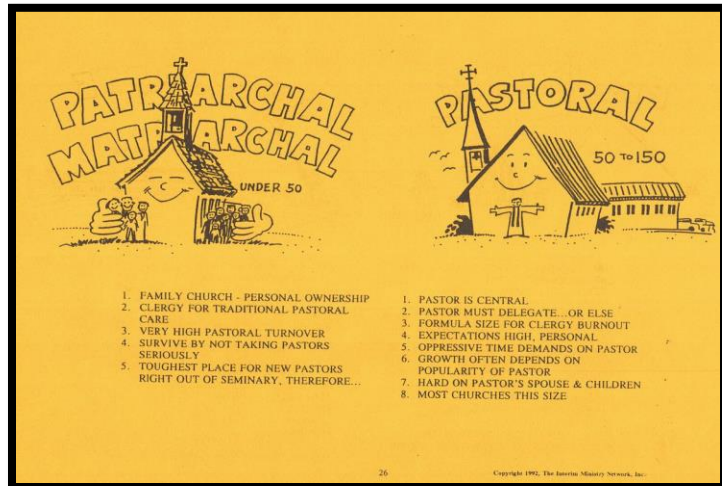


Figure 7 - Characteristics of "Mom & Pop" and "Pastor" Sized Churches

Note in Table 3 titled “Characteristics of ‘Mom & Pop’ and ‘Pastor’ Sized churches,” characteristic number 2 of pastor-sized churches reads: “Pastor must delegate...or else.” In healthy pastor-sized congregations, many parish operational-administrative tasks are delegated to the pastor who, in turn, recruits and delegates to skilled staff and lay volunteers. You know you are ready to shift from family-sized to pastor-sized when lay leaders formally grant the pastor discretion over areas of ministry and congregational resources (and do not take it back again). PLC will benefit from exploring their need and willingness to delegate more to the pastor and staff and to promote a shared ministry environment.

Regardless of size category, church workers desire to have workplace engagement, respect, trust, and motivation. Lay members tolerate no less in their own vocations. Pastors should be given the necessary authority and responsibility to properly shepherd in accordance with their vocation (Divine Call), professional experience, competencies, and educational backgrounds. Conflict over the roles, responsibilities, and leadership styles of volunteers and professional church workers may impact the overall wellness of the church and its ability to proclaim the gospel to the nations.



## #2 – CHURCH GOVERNANCE AND LEADERSHIP

### PLC MEMBER COMMENTS:



- 1) Our strengths are, “that we have very educated, cultured, and experienced management members on both sides of the political spectrum.”
- 2) **I am concerned about “figuring out leadership and who will handle various responsibilities...”.**
- 3) The steps we need to take: “speaking with church leadership and members on possible solutions.
- 4) “Church Council should be more of an overseer or executer of the congregation’s wishes and not their own. This is true even before the transition” (e.g., Rev. Kenneth Davis).
- 5) “I would like to see more communication with all the members of our congregation not just the Council.”
- 6) **“I think the Pastor will have to show leadership. For so many years now there have been too many ‘cooks’ running the congregation.”**
- 7) “I have seen good and bad. Good support. Bad management” – **“Too much micromanaging.”**
- 8) “Good leaders on Council...a pastor is needed to help with everyday issues.”
- 9) “We need a strong policy on a system for office administration by the pastor and church secretary with less people with their fingers in.”
- 10) Prior pastors (Rev. Davis and Mees) did not want to oversee the daily office routine, so people stepped up and did what they wanted to do causing overlaps, shortfalls, hurt feelings.”
- 11) **“Determine optimal staffing arrangement.”**
- 12) “Streamline policies and procedures.”
- 13) “I see the pastor as the Grand Concert Master, carefully, lovingly giving signals to each musician so that the music is melodious, not a cacophony of noise.”
- 14) “There is a power struggle between the Council and Elders.”
- 15) **“Too many chiefs.”**

### PASTOR LEE’S COMMENTS:



The members of PLC are frustrated over how day-to-day ministry gets done. There is confusion over how ministries are aligned with a strategic ministry plan that is unifying and complementary. PLC is passionate about making a Gospel impact in the community but does not know how to make that impact. The frustration is realized on all fronts – lay leaders, lay members, and staff. Based on initial observations, a formal sharing of the day-to-day ministry duties and responsibilities with the pastor and staff appears to be difficult for PLC. It will be good to explore willingness in this area.



Having been on staff as Intentional Interim Pastor (IIP) for the past three months, I am able to



affirm there is confusion over boundaries and limits. Decision rights are not clearly delegated. Ministries are fragmented, functioning in “silos.” Leaders do not effectively leverage resources (ministry teams, human capital-volunteers and staff, budgets, etc.) in a complementary, collegial, and collaborative fashion. Ministry leaders are crowding the ball, jumping into other leader’s areas of perceived responsibility. Since everything appears to belong to everyone, nothing belongs to anyone. According to members, governance and staffing have become serious issues of concern over the last 10 to 15 years. Consequently, every decision becomes a tug-of-war (power struggle), or turf war. One member said, “Too many cooks in the kitchen.” I have not observed any hostile behavior, but harmful and possibly demoralizing. The power struggles seem to be over sharing space, empowering staff, executing worship, and messaging and signage, to name a few.



*Figure 8 - Leadership Power Struggle*

To be clear, PLC has been blessed with very gifted lay leaders and pastors who love the Lord and each other. They are working diligently – maybe too hard. Given PLC leaders’ dedication, they are prone to over-functioning and rescuing. These traits have become chronic and there is little room for a new settled pastor. In fact, informally there are already five pastors (Pastor Joe, Pastor Cyndi, Pastor Roger, Pastor Meyer, and Pastor Mees, see “Unresolved Issues” section) who are

directly or indirectly shepherding the ministries of PLC.

Since the current PLC leadership is accustomed to rescuing and micromanaging the staff and resources, the congregation is held hostage and cannot mature or grow up. Over-functioning by lay-leaders means the staff can under-function. With the lay-leaders focused on staff behavior, the ministry teams entrusted to the lay-leaders may become the subject of neglect. No governing document, including job description, provides the pastor with any ministry responsibilities other than Sunday morning preaching. If the congregation chooses to share more ministry oversight with the staff, a transition plan will have to be developed to (1) hand off the new work (timeline, update job descriptions, transfer resources, etc.); (2) offer professional development and training; (3) covenant as lay leaders to manage one’s own behavior (avoid micro-managing, deep-dives, workarounds, double-delegation); and (4) extend a whole bunch of patience.

Like in any profession, church workers need professional development. A shared team ministry model between laity and clergy is more critical now than ever. PLC would be out front in the world, promoting a healthy ministry environment where the church workers and staff are excited about ministry and the members sense the joy and enthusiasm.

Many of my thoughts above are based on the table below – “Leadership Changes During an Interim – Characterized by the following issues and actions”.

**LEADERSHIP CHANGES DURING AN INTERIM** – characterized by the following issues and actions.

Power and control of decisions and direction of congregation.  
 Healthy, realistic, and open decision making; wide ownership and delegation of decisions. Managing conflicts to promote congregational unity. Honoring past leaders and finding ways to keep them involved.  
 Burn-out and drop-out of leaders, leadership development.

<b>Symptoms of Non-resolution</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Indications of Resolution</b>
Divisions, destructive sub-grouping, competition, avoidance	X					Open leadership and decision-making structures
Power plays, making end runs around process		X				Inter-dependency: readiness to work together; volunteers come
Win-lose decisions		X				Win-win decisions
Decisions are not clear, are not carried out, or fall apart	X					Clear decisions with follow-through
Church worker oversight committee becomes a power center, point of tension, and does not communicate well			X			Shared leadership in maintenance and developmental tasks
Secret meetings, self-authorized decisions, gossip, and rumors		X				Election, acceptance, and support of new leaders
Exclusiveness, blaming, avoidance of conflict	X					Inclusiveness: conflicts and differences dealt with openly; both old and new leaders involved

Figure 9 – PLC Pastoral Call Readiness: Unresolved Leadership Issues

Church governance and leadership is about PLC finding an organizational and operational structure that best enables the congregation to serve together in Christian love (and then function properly inside that model). The six most common governance models found in the LCMS are:

1. Voter’s Assembly
2. Parrish Planning Council
3. Parallel Boards
4. Policy-Based Governance
5. Policy Governance
6. Managing Board



***PLC’s Current Model: The Parrish Planning Council***

Consider again what Dr. W. Edwards Deming famously said, “Your organization is perfectly designed to get the results you are getting.” PLC’s current governance model is the “Parrish Planning Council” (also known as the “Don Abdon” model) according to the By-laws Article V, page 8. In Article V, Section 1, letter A, the pastor is listed as a member of Council. It is unclear if the Pastor(s) is a “voting member” or “non-voting ex officio member of the Church Council.”<sup>4</sup>



<sup>4</sup> “Palisades Lutheran Church By-Laws Approved by the Congregation March 28, 2004, as Amended (Most

In most settings Pastors tend not to be voting members given the conflicts of interests. The challenge with the Parrish Planning Council governance model in a family sized church is the expectation (or burden) of lay-leaders to function both as the quarterback and wide-receiver. They are expected to oversee both the strategic level planning and then execute in the day-to-day ministry operations. How is that working for PLC? Such a model worked well when there was an abundance of players on the field, volunteer-members.

Article IV, Section 2. of the By-Laws states, “Each Pastor is under the discipline of the Synod to which he belongs.”<sup>5</sup> This oversight statement presents a learning opportunity for PLC. The Pastor is under the multiple authorities. First, he/she is accountable to God (Hebrews 13:7); next, his/her respective judicatory (Synod) in matters of doctrine and holy living; and finally, the local congregation in faithful execution of his/her divine call. Many congregations will elect a “pastoral review committee” to provide annual feedback to their pastors. This committee is often made up of elders, council members, and members at large.

PLC would do well to review the various church governance models and either reaffirm a commitment to Parish Planning Council model or find a governance model that better complements PLC’s culture and leadership style.



Church governance expert, Dr. James Galvin notes, “This model tends to be more effective than a monthly voter’s meeting. With a church council meeting monthly and the ministry boards functioning the voters can meet once or twice a year to approve the annual budget and elect new officers.”<sup>6</sup> He recommends: “Instead of doing work, the council [meaning executive officers] should leave this to the pastor and staff, committees, and to the lay-led ministry boards. Their role should be fiduciary oversight, organizational health, and planning for the future.” He continues, “As much as possible, the council should act like a board.” (See **Figure 10** below titled: “Five Ways to Function as Boards.”)

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Recent Amendment June 4, 2017).

<sup>5</sup> Ibid., 7.

<sup>6</sup> Galvin, James, “Five Types of Governance in the Lutheran Church—Missouri Synod,” (Galvin & Associates, Inc., [www.galvinandassociates.com](http://www.galvinandassociates.com).) 5.

**Note:** The below chart refers to all 501c (3) organizations. Here, the term “CEO” refers to the professionally trained church worker who is tasked to oversee ministry. In the church, it may be the position of the “Pastor;” in the school, it may be the position of the “Principal” or another qualified staff

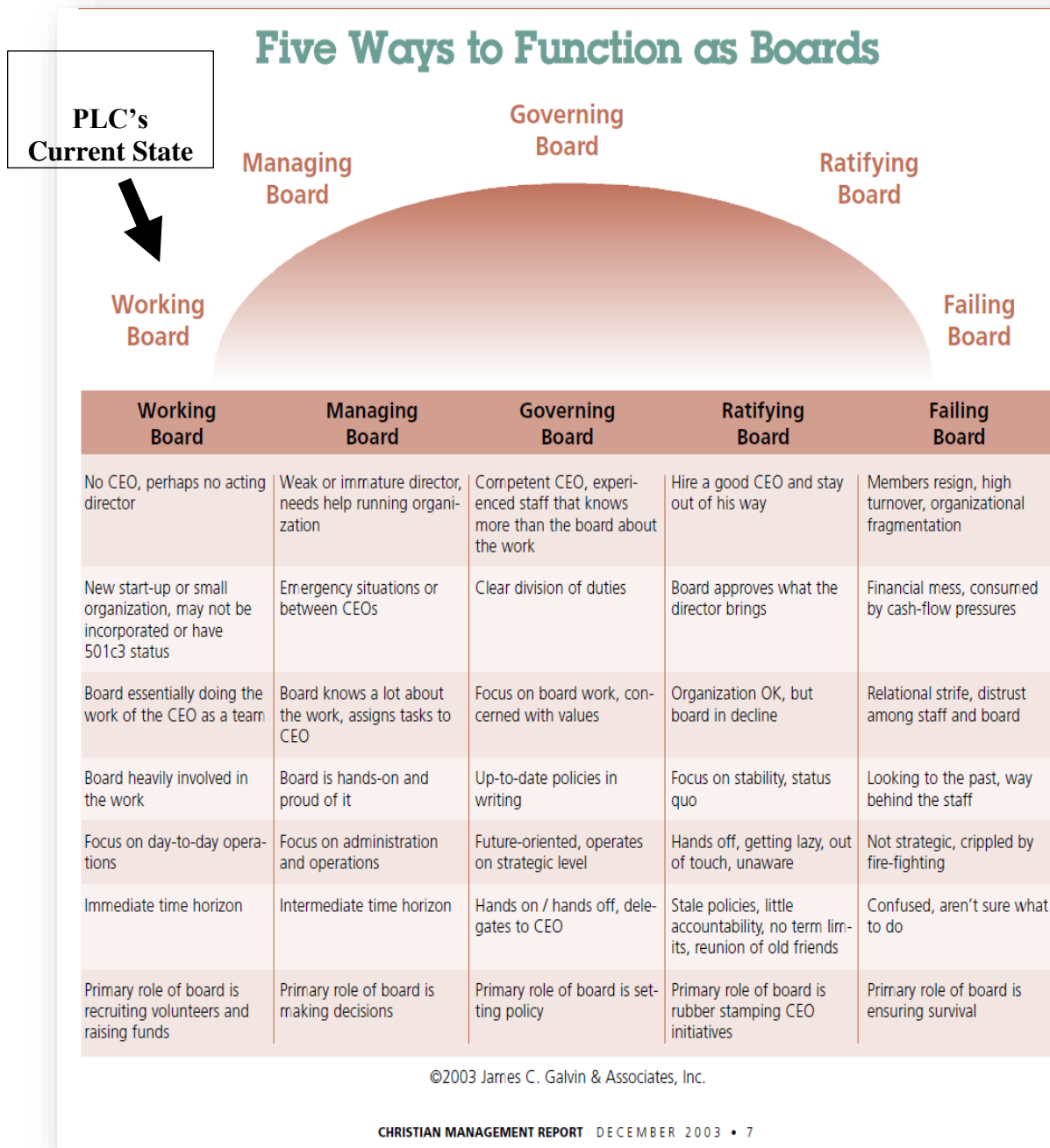
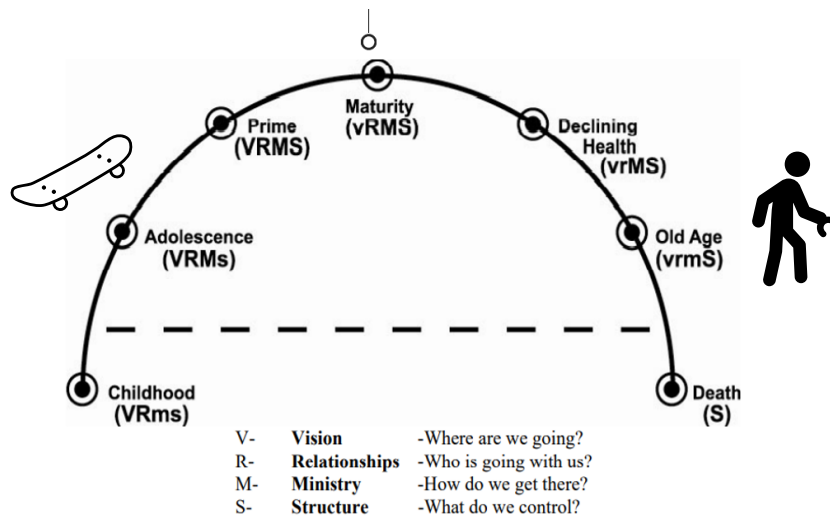


Figure 10 - PLC Leadership functions as a "Working Board."

PLC members were torn between seeing themselves in the “Adolescence” stage or the “Old Age” stage of the congregational lifecycle. Interestingly, PLC has given birth (and continues to

give birth) to a variety of new ministry fronts, suggesting they are somewhere in the earlier years of the cycle – the birthing or reproductive years. Yet members report they are feeling the effects of old age. It would be useful to consider each in the light of the following questions:

1. Where do you see **PLC** today on the life cycle?
2. Where do you see **Yourself** on the life cycle?
3. Where do you see your **Departed Pastor** on the life cycle prior to departure?
4. Where do you see the **Elder Ministry** on the life cycle?
5. Where do you see the **Worship Leaders and Ministry** on the life cycle?
6. Where do you see the **Youth Leaders and Ministry**?
7. Where do you see **Revive LA and STAR Preschool** on the life cycle?



**Where is your Congregation on the Life Cycle?**

*Figure 11 - Seven Stages of a Typical Congregational Life Cycle*

It will be important for PLC to pinpoint which life cycle stage it identifies with the most. Doing so will assist the congregation in calling a new pastor, aligning realistic goals for staffing, Vision-casting, and stewarding the congregation’s resources. For instance, if the congregation determines it is in the “adolescent” stage, it may be served well by a pastor whose leadership style is mature and who is able to “speak order into chaos.” If PLC finds herself in the “old age” stage, she may need a “chaplain” type pastor who has wonderful bedside manner and can assist certain ministries to die with dignity so new ministries may be birthed; or staff who can transition or repurpose their skills.



The below life cycle arch illustrates the type of ministry intervention necessary depending on which stage a congregation is at. This information will be useful to inform pastoral candidates of PLC's current stage and the type of ministry intervention PLC would be inviting the pastoral candidate to assist in leading.

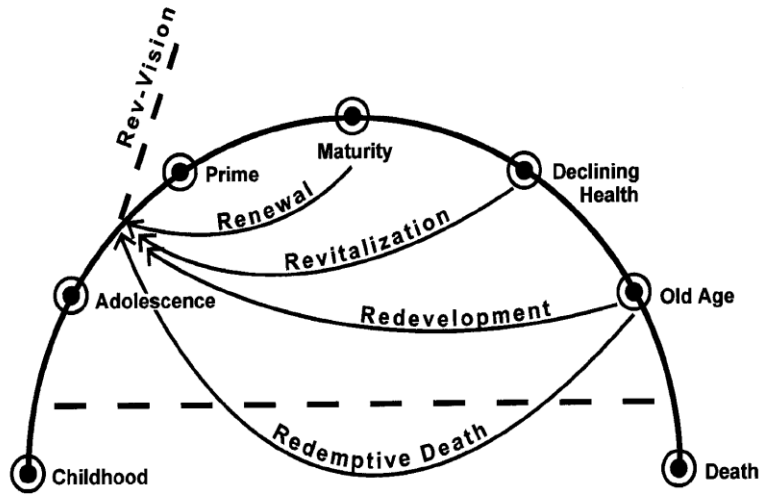


Figure 12 - Critical Points in a Church's Life Cycle for Transformation

### #3 – FINANCIAL VIABILITY

#### PLC MEMBER COMMENTS:



1. “Wondering how we will be able to continue with declining membership and income.”
2. **“One household is giving one-third of the congregational offerings.”**
3. “Get financial controls and reporting in order.”
4. “People have the impression finances are bad. They are in fact quite good. Our balance sheet is good, and our income outpaces our expenses.”
5. “Most congregation members fear that the church’s financial situation is dire. This is not the case, but the complexities surrounding finances and our history of having a trusted treasurer for decades who could handle all matters without others working on it makes us less informed.”
6. **“A major concern is can we afford a pastor?”**
7. **“We just throw money at ministries and many outside our church.”**
8. “Too much focus on finances.”
9. “I don’t know what we can afford, and I am on the Council.”
10. “I don’t think we manage funds well.”
11. **“Too many pet projects.”**

**PASTOR LEE’S COMMENTS:**



**A**ssociated with the decline in attendance is a concern for the decline in offerings and income. Interestingly, gross income appears...



A work in progress.

**2019 Year End Profit Loss Statement, a PLC excel spreadsheet submitted at Council Meeting on January 13, 2020 and developed from Pastor Lee's best efforts guess on shared expenses (allocation of volunteer hours not yet included).**

	PLC's Worship Ministry	PLC's Bible Studies	PLC's Youth and Family Ministry	PLC's Outreach and Evangelism	PLC's Stewardship Ministry	Revive LA	Star Preschool	PLC's Elder Ministry
Revenue	\$ 396,615.00	\$ 2,000.00	\$ 2,500.00	\$ 2,500.00	\$ 5,000.00	\$ -	\$ -	\$ -
Direct Expense	50,000.00	20,000.00	2,500.00	2,500.00	-	6,000.00	10,000.00	2,500.00
Shared Costs	100,000.00	7,500.00	7,500.00	-	-	25,000.00	75,000.00	7,500.00
Administration/ Volunteer hours	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>150,000</b>	<b>27,500</b>	<b>10,000</b>	<b>2,500</b>	<b>-</b>	<b>31,000</b>	<b>85,000</b>	<b>10,000</b>
<b>Surplus / (Deficit)</b>	<b>\$ 246,615</b>	<b>\$ (25,500)</b>	<b>\$ (7,500)</b>	<b>\$ -</b>	<b>\$ 5,000</b>	<b>\$ (31,000)</b>	<b>\$ (85,000)</b>	<b>\$ (10,000)</b>

Figure 13 – Understanding the “True Cost” of PLC’s Core Ministries

**Scarce resource theory** suggests PLC must choose ministry allocations which are viable according to the limits of their physical resources (e.g., financial, space, volunteers, staffing, etc.). This does not mean PLC does not live out a bold and courageous faith in promoting the Gospel of Jesus Christ. It simply means, using her God-given reason and common sense, PLC has been called to “live within her means” and to use her resources wisely. That would include how to deploy and maximize the gifts of the pastor, staff, ministry teams, volunteers, and use of the building.

**Sustainable Resource Theory.** Some members feel there is an overemphasis on financing the building and less on frontline ministry. Ultimately, PLC’s leaders are responsible for aligning the church’s offerings income with ministry goals. Careful planning and oversight are never easy, and all who have been called to serve in this area of church life are to be thanked and remembered earnestly in our prayers. These leaders have a noble task that requires much oversight, as ministry responsibilities are continually passed between hands.

Financial sustainability of PLC as a congregation will be addressed through using the Gospel Impact and Stewardship Tool (GIST) defined in the next section, “A Strategic Ministry Plan,” as it applies to individual frontline ministries. Performing a cost/benefit analysis of individual frontline ministries, as well as aligning frontline ministries with the church’s overall mission of bringing Christ to the world, will help address PLC’s financial sustainability concerns generally. See “A Strategic Ministry Plan” for a full GIST description.



## #4 – STRATEGIC MINISTRY PLAN

### PLC MEMBER COMMENTS:



1. “There are too many churches in Pacific Palisades. There is competition in the Christian Market Place. PLC may have to merge with one of the other 3 evangelical churches and change its name to maybe “Palisades Community Church.”
2. **“I have not heard much about change.”**
3. “We have lost faith that the congregation can change and our call for changes will be ignored or rejected.”
4. **“We need an actual plan.”** “We have no Master Plan.”
5. “We need to figure out what we are supposed to do, religious values as members of the community, and as individuals.”
6. “Identify our mission in the community.”
7. **“Be open to new ways of doing things.”**
8. **“There is much potential once a clear direction is taken, and everyone is on board.”**
9. We need a “Well thought out plan to attract visitors and children.”
10. “PLC needs to be relevant in today’s world.”
11. “The Pastor needs to provide thought leadership.”
12. **“No defining cause for the past 50 years.”** (Ministry just happened.)
13. **We are just a discombobulated bunch of separate individuals with different ideas and goals trying to keep afloat.**
14. Pastor Davis wanted us to support (and we did) “Feed Our Starving Children.”



## PASTOR LEE'S COMMENTS:

**I**n the Great Commission, the Lord set forth His clear mandate, or “Mission” for the church. Every Christian church shares the same Gospel Mission: to go and share the message of forgiveness of sin, life, and salvation in Jesus Christ alone (Matthew 28:19-20). What that looks like (Vision – Strategic Ministry Plan) will be different for each congregation. King Solomon wisely observed in planning for the future, “Where there is no vision the people perish” (Proverbs 29: 18a). Rev. Dr. Peter Steinke explains that the root of the word ‘disaster’ comes from two Greek terms, one for ‘distance’ and the other for ‘star.’ When sailors lost sight of their star at sea, they associated this with the term ‘disaster.’ Too often churches lose sight of their star: their purpose, their mission and vision. Ultimately, by prayer and perseverance, **God will make known** His mandate for Palisades Lutheran Church (Jeremiah 29:11-13). Having this clear sense of vision<sup>7</sup> will aid in coming to terms with past and present events and embracing a path forward.



Many congregations over-focus on consensus-building or funding to assess whether a particular ministry is viable. The authors of *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability* recommend “a nonprofit’s strategy for sustainability” includes both “programmatic elements” and “financial elements.”<sup>8</sup> **Where businesses typically refer to the bottom line, these authors advise nonprofits refer to a “dual bottom line – impact and financial return.”**<sup>9</sup> They assert it “is a concept involving both financial health and programmatic impact, and that leaders are constantly attending to both.”<sup>10</sup>



Using these dual bottom line and visual mapping concepts, I have developed an organizational stewardship resource tool for congregations called the “Gospel Impact and Stewardship Tool” (GIST). It is a ministry map which provides a visual picture to show the integration between Gospel impact and stewardship (financial viability) of ministry programs. Non-profits do not speak of profitability. Instead, they focus on mission impact in the world, or “making a difference.” The GIST tool helps monitor both Gospel impact and financial viability, a dual bottom line.

In a single matrix map, PLC can see their core ministries based on their congregation’s perceived Gospel impact and actual financial data. All ministries have different levels of impact. Congregations cannot do everything with finite resources. This means they will have to choose. These can be difficult decisions when you are choosing between “good” and “great” ministries.



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<sup>7</sup> “Gospel Impact,” as described in Section II in the GIST map, is a measure of how aligned a specific ministry is with the church’s overall vision.

<sup>8</sup> Bell, Jeanne; Masaoka, Jan; Zimmerman, Steve; “Nonprofit Sustainability: Making Strategic Decisions for Financial Viability,” (Jossey-Bass, San Francisco, CA 94103, 2010.), 16.

<sup>9</sup> Ibid.

<sup>10</sup> Ibid.

Having a visual map will assist PLC in making these strategic ministry decisions.

Conducting a financial viability analysis is necessary to create the ministry map and enable PLC to facilitate group discussions, then vote on a strategic ministry action plan.

### **STEP 1 – IDENTIFY PLC Core Ministries**

The first step is to identify PLC’s core ministry programs. In reviewing PLC’s governing documents and discussing with leadership, eight distinct ministries emerged. They are listed in the table below. Every church, whether they realize or not, has a current strategic ministry model that can be mapped. That is, every church has a set of core activities it executes, and strategies for obtaining the necessary funds. Often, such activities and funding strategies are not well understood (not explicit), let alone well-articulated. Below are the eight formal and informal ministry activities that appear to play a key role in PLC’s current state strategic ministry plan.

WORSHIP MINISTRY	BIBLE STUDY MINISTRY
YOUTH AND FAMILY MINISTRY	OUTREACH AND EVANGELISM
STEWARDSHIP MINISTRY	REVIVE LA MINISTRY
STAR PRESCHOOL MINISTRY	ELDER MINISTRY

*Figure 14 - PLC's Core Ministries*

### **STEP 2 – DISTRIBUTE and SCORE the GIST Leadership Survey**

When evaluating the eight above core ministries for Gospel impact in the GIST survey, the following four criteria were used by PLC leadership (Council and Elders):

#### **Criteria #1: Alignment with Core Mission**

Over time, ministries may drift in core mission alignment. Hence, at any given time, some ministries are more aligned than others in Gospel impact. Most (or probably all) current ministries have some level of impact on individual participants, but there is room for discussion about whether these ministries are ever increasing (Eph 4:12-13) in alignment with the congregation’s core mission to promote the Gospel of Jesus Christ.

#### **Criteria #2: Excellence in Execution**

Often ministry programs will spend more explicit attention to planning than to execution. The criterion of excellence is a way of getting at execution. Is this ministry program something that

the church-school offers in an outstanding, superior way? Do we execute this ministry program competently, or do we execute it amazingly well? The following are sources of information related to the criterion of excellence: program evaluation data; feedback from PLC members, and direct observation; staff performance evaluations; staff turnover and exit interviews.

**Criteria #3: Community Building**

One measure of impact may be related to building the capacity and strength of the community – care ministries, spiritual growth, and mission field – rather than to building the organization itself. Does the ministry program help build the community around the church? The following sources may provide information related to the criterion of community building: Interviews with community and ministry leaders; Reviews of member support; and recent surveys.

**Criteria #4: Leverage**

Ministry programs, of course, do not exist in isolation. One element of impact is leverage, the degree to which a ministry program increases the impact of other ministry programs. A ministry may score high on the criterion of leverage because it creates opportunity for evangelism, member and visitor assimilation, youth engagement, volunteer participation, worship attendance or increased offerings.

On a scale of 1 to 4, with 4 being the highest, the Council members and Elders rated each of these 8 ministries. The Council members and Elders were informed this process is not about deciding which ministry programs are good and which are bad. Rather it is about acknowledging, and collectively thinking through, which ministry programs have relatively more Gospel impact than others. Therefore, ministry programs cannot all be at the low end or high end of the impact spectrum.

Assessing Gospel Impact

On a scale of 1 to 4 with 4 being the highest, please rate each program below on the following criteria. As you complete the survey, remember that there is no "right" answer in the survey and take into account all the information you have from your experience with the organization.

Program	Criterion 1	Criterion 2	Criterion 3	Criterion 4	Score
	<i>Alignment with Core Mission</i>	<i>Excellence in Execution</i>	<i>Community Building</i>	<i>Leverage</i>	
PLC's Bible Studies	3.0	2.5	2.3	2.8	2.7
PLC's Elder Ministry	2.7	2.4	2.4	2.7	2.6
PLC's Worship Ministry	2.5	2.5	2.4	2.5	2.5
PLC's Outreach and Evangelism	2.7	2.2	2.5	2.5	2.5
Revive LA	2.6	2.0	2.5	2.7	2.5
PLC's Stewardship Ministry	1.8	1.9	1.6	1.6	1.7
PLC's Youth and Family Ministry	1.4	1.7	1.7	1.9	1.7
Star Preschool	1.3	1.8	1.7	1.8	1.7

Figure 15 - Results from PLC Council and Elder Responses to GIST Survey

### STEP 3 – CONDUCT a Financial Viability Analysis

In conducting a financial viability analysis, PLC will begin by determining the “true cost” of each core ministry. PLC’s finance committee should agree on, for internal use only, a formula for calculating shared expenses. This entails allocating income and expenses of each core ministry, including staff salaries and volunteer time. Based on usage (impact) PLC will include for each separate ministry: direct expenses, shared expenses, and a portion of administrative expenses. Shared ministry expenses (common costs) do not relate to any one ministry but are shared among multiple ministries. For instance, your pastor, church secretary, musician, utilities, mortgage, etc..<sup>11</sup>

Additionally, to understand the true cost of each ministry, PLC will have to gain some knowledge about the volunteer hours associated with each core ministry represented on the GIST ministry map. The authors of *Nonprofit Sustainability* note, “Similar to in-kind expenses, if it weren’t for the generous time of volunteers, many nonprofit organizations wouldn’t be able to survive, yet alone thrive.”<sup>12</sup> Each ministry may be supported by hundreds of “volunteer” hours each year. **Note: the below table is for illustration purposes only. It is in a very rough draft stage. It does not account for volunteer hours and the revenue and expenses are simply ball-parked.**

**The Gospel Impact Stewardship Tool (GIST) - Ministry Mapping to Strategic Decisions** Rev. Martin Lee, III  
(Intentional Interim Pastor)

	PLC's Worship Ministry	PLC's Bible Studies	PLC's Youth and Family Ministry	PLC's Outreach and Evangelism	PLC's Stewardship Ministry	Revive LA	Star Preschool	PLC's Elder Ministry
Revenue	\$ 396,615.00	\$ 2,000.00	\$ 2,500.00	\$ 2,500.00	\$ 5,000.00	\$ -	\$ -	\$ -
Direct Expense	50,000.00	20,000.00	2,500.00	2,500.00	-	6,000.00	10,000.00	2,500.00
Shared Costs	100,000.00	7,500.00	7,500.00	-	-	25,000.00	75,000.00	7,500.00
Administration/ Volunteer hours	-	-	-	-	-	-	-	-
<b>Total Expenses</b>	<b>150,000</b>	<b>27,500</b>	<b>10,000</b>	<b>2,500</b>	<b>-</b>	<b>31,000</b>	<b>85,000</b>	<b>10,000</b>
<b>Surplus / (Deficit)</b>	<b>\$ 246,615</b>	<b>\$ (25,500)</b>	<b>\$ (7,500)</b>	<b>\$ -</b>	<b>\$ 5,000</b>	<b>\$ (31,000)</b>	<b>\$ (85,000)</b>	<b>\$ (10,000)</b>

Figure 16 - PLC Core Ministry Financial Data

<sup>11</sup> To help account and monitor these time allocations the Brown University job description template provides a place to allocate percent of time spent on each core ministry. See the Church Secretary position description I developed for Yolanda.

<sup>12</sup> Zimmerman, Steve and Bell, Jeanne, “The Sustainability Mindset: Using the Matrix Map to Make Strategic Decisions,” (Jossey-Bass, San Francisco, CA, 2015.), 109.

## STEP 4 – CREATE GIST Ministry Map

Putting together a Matrix Map calls for plotting your congregation’s frontline ministries according to their Gospel impact and financial viability. Depending on where an activity is placed on the map, a strategic imperative emerges. These strategic imperatives are the actions that would most likely strengthen the effectiveness of each ministry’s reach and viability – or call for tough decisions to allocate resources elsewhere. (See Figure 17 below.)

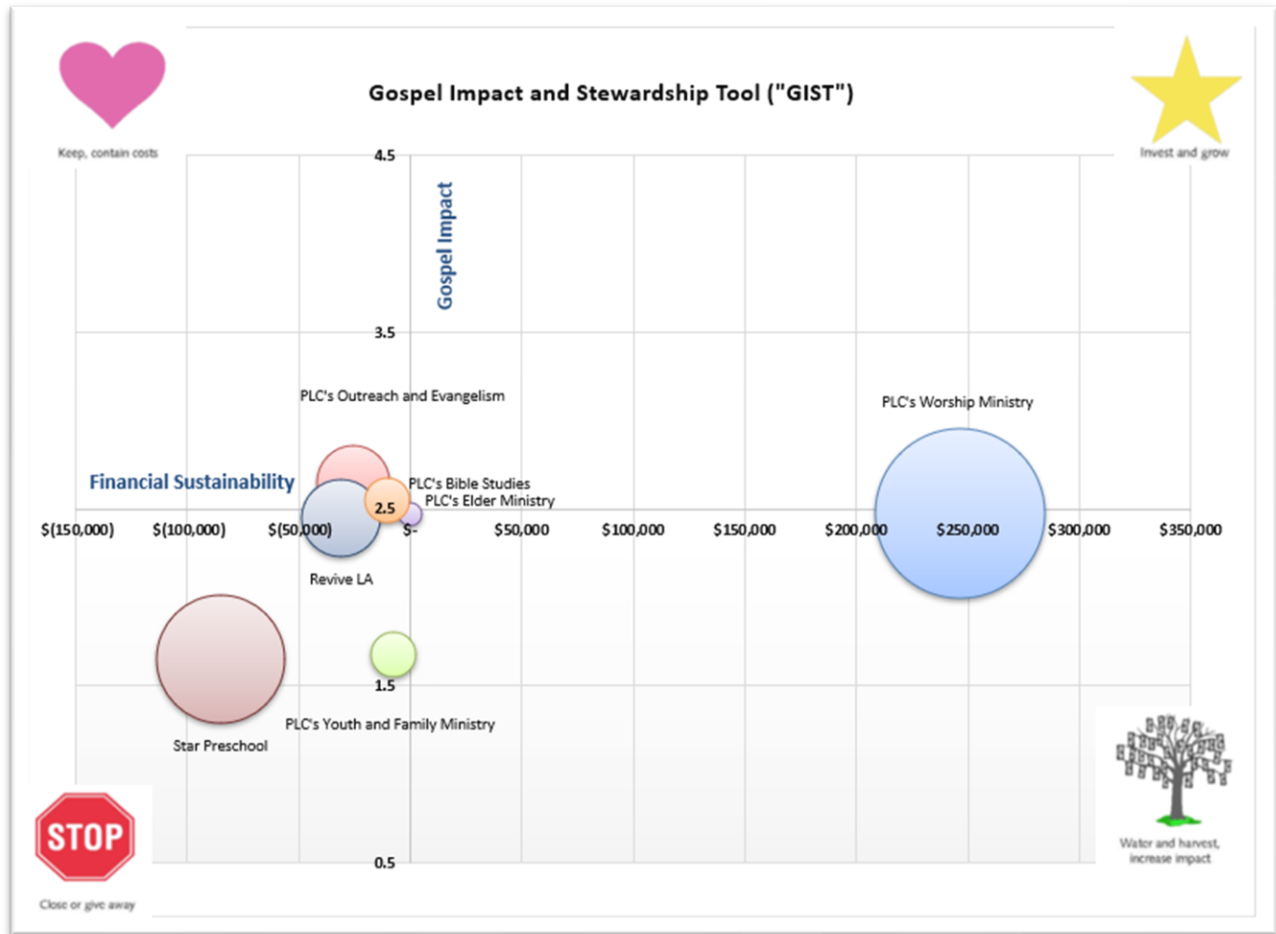


Figure 17 - PLC GIST Ministry Map (rough draft for illustration purposes only<sup>13</sup>)

## STEP 5 – EVALUATE GIST Strategic Imperatives

For many church leaders, the Matrix Map provides sudden clarity on how the congregation’s different activities inter-relate. Beyond helping leaders understand their ministries’

<sup>13</sup> The Gospel Impact data is based on the responses of 10 PLC leaders. The financial data is based on PLC 2019 financials, but the shared expenses are best effort guess and volunteer hours are not included.

effectiveness, the Matrix Map can help congregational leaders strengthen them.



Figure 18 – GIST Ministry Mapping helps identify “Strategic Ministry Imperatives”

CORE MINISTRIES	QUADRANT	IMPERATIVE	ACTION
Worship		Invest & Grow. Keep watering and increase impact.	To be determined.
Bible Study		Keep. Contain costs. Invest and grow.	To be determined.
Youth and Family		Keep. Contain costs. Close or give away.	To be determined.
Outreach and Evangelism		Keep. Contain costs.	To be determined.
Stewardship		Close or give away.	To be determined.
Revive LA		Keep. Contain costs. Close or give away.	To be determined.
STAR PreSchool		Close or give away.	To be determined.
Elders		Keep. Contain costs. Invest and grow.	To be determined.

Figure 19 – A Sample Summary of PLC’s Strategic Ministry Plan

### STEP 6 – DEFINE and AGREE on Strategic Action


King Solomon says a wise person seeks much council (Proverbs 15:22). This strategic imperatives table assists congregations to take inventory of all the Lord has entrusted to their care, and to contemplate on how well they are stewarding the Lord’s resources for Gospel impact in the world.

Considering whether to keep ministries or let them go are not easy decisions with easy answers. Instead use the GIST ministry map and strategic imperatives table as a way to engage PLC members and leadership to prayerfully recruit the congregation’s best thinking on God’s mission

plan for PLC.

# 5 – SOCIAL & ENVIRONMENTAL JUSTICE (Doctrine & Practice)

**PLC MEMBER COMMENTS:**

- 
1. Congregational president “was asked to resign for acting vocally to the Black Lives Matter rallies going on...This is the conflict that I regard as relevant to current life at PLC.”
  2. **“To be relevant in today’s world and speak to the young people PLC has to open up and speak out on social, cultural and global issues...”.**
  3. “Do we really think that a 20-year-old who visits the church and is told that climate change is a hoax would come back?”
  4. **“Some members want the church to take stand on political issues. We strongly disagree.”**
  5. “This Trump cult may not be finished. If they rule at PLC, I am out.”
  6. **“The doctrinal differences between LCMS and LCMC are not clearly understood.”**
  7. “I left the previous Lutheran Church because of the same-sex union issues.”
  8. “Pastor Mees wanted to leave the ELCA over the same-sex union issues. He did and we followed.”
  9. **“Some political issues that have caused dissension in PLC: Gay rights; global warming; gun rights; energy, shutting down economy and schools; media bias; etc.”**
  10. “Cannot engage in meaningful conversations.”



## PASTOR LEE'S COMMENTS:



The Berean Jews were praised in the book of Acts because they “received the message with great eagerness and examined the Scriptures to see if what Paul said was true” (Acts 17:11). God invites, and actually delights, in the ‘investigations’ that man conducts to discover the truth (Proverbs 25:2). He hides to be found. He calls us to explore and reflect on congregational behavior to assure us that we are acting in accordance with the faith we have received in Christ.

My hunch is some of the tension surrounding “Social and Environmental Justice” issues is due to the lack of teaching on how the LCMC (including ELCA and ALC) and the LCMS approaches to theology are complementary as well as divergent. Even after 50 years in side-by-side ministry, these two Lutheran churches are struggling to discuss matters of theology, politics, and sociology. PLC is experiencing a heightened level of anxiety, unclear doctrinal identity and, consequently, uncertainty in practice. Many of these obstacles could be “thrown off” (Heb. 12:1) by faithful teaching and preaching that unifies all PLC Bible teachers and members in Word and deed.

The major concern of the church on earth is preaching and teaching the truth of Christ. Preaching and teaching the truth of Christ is a challenging task. This may be especially so of late, as politics has encroached on worship and family life in such a way that the truth of Christ is directly challenged. The excellent CTCR<sup>14</sup> document is summarized in part below as an aid to discussions PLC may have on how best to define herself around doctrine and practice: what her doctrinal identity should be and at what level to engage in social activism.

1. When The Church Speaks Corporately. There are times when the Scriptures speak so clearly and directly to a particular issue that it is possible and may even be necessary for the church to take a corporate stance on it. This is the case with respect to such problems as abortion and euthanasia. In some cases, it may only be possible for the church to speak to the morality of a given issue without coming out in favor of or opposition to legislation in this area, e.g., homosexuality or divorce. In still other cases, sensitive questions may arise for public debate concerning which God’s Word provides even less specific guidance. Even here, however, these issues may have important implications for the church as an institution or may have a potential for depriving individuals of religious rights or liberties. In these cases, it may be helpful for the Synod, while recognizing that Lutheran Christians equally committed to following

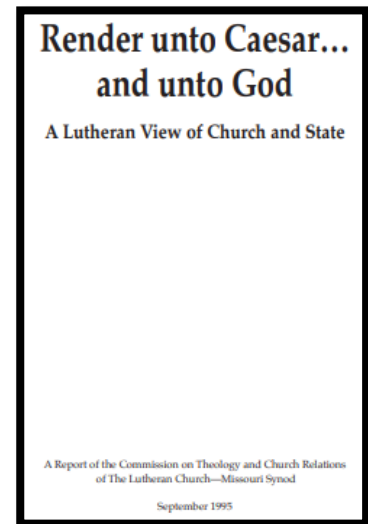


Figure 20 - A 91-page LCMS Report on the Doctrine and Practice of Church and State

<sup>14</sup> CTCR – Commission on “Church Theology and Church Relations” of the LCMS.

God's will as revealed in Holy Scripture may come to different conclusions, to keep its members informed and offer guidance to them as they determine their own positions (quote, p. 51).

2. The Lutheran Perspective. The Lutheran model is, admittedly, complex. Thus, even Lutherans have often succumbed to the simplicity of other models—models that resolve the tension either by pursuing a more this-worldly kingdom of Christ or by ignoring this world's problems. Yet, the difficulty with which Lutherans hold to their perspective does not invalidate it. Indeed, the Scripture provides ample support for the contention that authentic Christianity is a hard teaching, difficult to bear (John 6:60). The issue is not whether Lutheran teaching is easy to understand; the issue is whether it accurately reflects what the Bible says. The Lutheran perspective is also, admittedly, difficult to apply. Even when agreeing, for instance, that the church does not have a Gospel-based responsibility to promote the transformation of the civil realm, Lutheran theologians and church bodies have disagreed about whether the corporate church (and not just the individual Christian) has a Law-based duty to teach the state ethical principles. Theologians and church bodies have also disagreed about the most prudent and effective means by which the church might actually teach those ethical principles in a pluralistic and democratic society. The paradoxical tensions of the Lutheran perspective, therefore, make its practical application in diverse cultural and political systems a challenging task. As we turn now to the problems of practical application, it is important to keep in mind that there is in fact a Lutheran perspective—and that the Lutheran theological model can and will make a practical difference. Puritan-Reformed Christians really do have a different social agenda than do confessional Lutherans, and Lutheran Christians need to be careful of uncritical alliances with politically active Reformed Christians. On the other hand, the reader should also be cautioned to understand that American Lutherans are still struggling to apply their theology—created and nurtured in a culture of emperors and princes—to the challenges of the modern American democratic “experiment.” It is not surprising that there should be changes in thinking as this application progresses, although not all such changes finally can be viewed favorably (p. 53-54).
3. 1960s Liberation Theology. In the 1960s, the political advocacy was mostly by mainline churches, but by the 1980s, religious conservatives also had weighed in with their own lobbying efforts. For many mainline church bodies, the emergence of “Liberation Theology” coincided with their own advocacy interests. Several Latin American theologians, notably Gustavo Gutierrez, Juan Luis Segundo, and Jose Miguez-Bonino, argued that the strategy of liberation must supersede the strategy of development, because poverty exists primarily as a result of political

and economic oppression. “Liberation theology” was admittedly sympathetic to Marxism and voiced distinctly anti-American sentiments. After 1970, liberation themes and ideas were common in the social statements of mainline American churches.

4. 1970s Christian Right. The emergence of the New Christian Right in the late 1970s, however, gave religious conservatives an opportunity to use the same approach to oppose the Equal Rights Amendment, the Panama Canal treaty, Roe v. Wade, evolution, and secular humanism while calling for family values and prayer in the public schools. Activists created “biblical scorecards” that identified representative votes in Congress by which to judge office holders’ worthiness for re-election. Some, like Paul Weyrich, said flatly: “We’re radicals working to overturn the present structure in this country—we’re talking about Christianizing America.”<sup>126</sup>
5. Partisan Christianity. Prominent religious leaders have recognized that this has gone too far. Charles Colson has concluded, “Both liberals and conservatives have made this mistake of aligning their spiritual goals with a particular political agenda.” The danger, he warned, is that political alignment compromises the Gospel: Because it tempts one to water down the truth of the gospel, ideological alignment, whether on the left or the right, accelerates the church’s secularization. When the church aligns itself politically, it gives priority to the compromises and temporal successes of the political world rather than its Christian confession of eternal truth. For Colson, only a church free of political alliances can be the conscience of society (pgs. 59 – 60).
6. Types of Moral Authority without Political Partisanship. Reichley (following the suggestion of Berger) proposes that instead of concentrating on social action, the church should broker honest and probing dialog on the issues for the benefit of its members as Christian citizens: “By very reason of their broad and varied memberships and the moral standing they should naturally possess, the churches are well suited to act as mediators or fact-finders on many issues over which technical experts disagree.” **In order to do this, according to Reichley, the churches “would have to cultivate reputations for objectivity and open-mindedness as to means.** These qualities are hardly compatible with the positions that some churches have recently been taking as partisan combatants or propagandists for the political left or right.” If the churches become “too involved in the hurly-burly of routine politics,” argues Reichley, “they will eventually appear to their members and to the general public as special pleaders for ideological causes or even as appendages to transitory political factions.”

PLC will want to discuss the pros and cons of “top down” and “bottom up” ministry approaches to address social and environmental justice.

a. **Indirect Persuasion (Bottom Up).** A civil public square requires “principled participation” and “principled persuasion.” Thus, people of all faiths and worldviews, transcendental or naturalistic, should freely and fully engage all others concerned with the affairs of public life. ... Conviction and conscience must be respected because religious liberty is the most fundamental liberty of all. Therefore, in a principled democratic society, the church’s powerful public influence is from the bottom up: Under either the “total state” or the “total church,” the chief movement of an ideology or religion is, socially speaking, always direct and from the top down. But in a democratic society where principled participation is flourishing, their chief movement is always indirect and from the bottom up. ... Thus, in a pluralistic democracy each faith, whether transcendent or naturalistic, Western or Eastern, modern or traditional, exercises its primary shaping power morally and indirectly rather than politically and directly. Instead of any faith being promulgated from above, each must penetrate and influence from below. It should also be noted that the church must have a “stomach for disagreements” as well as respect for differences of conscience. Also in the church, and not only in the public square, civil but principled debate on social ethics must be encouraged. The critical questions, therefore, are not whether the church should be involved with politics, or whether it can even avoid being involved with politics, but “how church and politics are and ought to be related” and “how each kind of political involvement affects the nature and mission of the church.”

b. **Direct and Intentional Persuasion.** Because the institutional church has authority with its own members, grounded in their desire to hear and learn God’s Word, it can even challenge its members to address unpleasant social problems that they might prefer to evade. But in doing this, the church does not seek to bind the consciences of its members so much as to sensitize them. For the church is ever conscious of the potential for polarization whenever social issues arise, and the church’s goal is never to endanger the flock (through political polarization) but to nurture it carefully with lovingly persuasive speech. As with the first connection, the church relies primarily on the power of the Holy Spirit and the Gospel for motivation to deal with social issues (faith active in love). It is absolutely necessary for the church to “do its homework” on the problems to be addressed. Broad-based consultations with church members who have expertise in the areas of concern are essential. The church also should refrain from presuming to dictate specific means by which certain goals are to be achieved, since selecting the means is often the most difficult and controversial political



task.

- c. **Direct and Intentional Influence.** Benne's third possible connection is direct and intentional influence. "Direct" here means that the church speaks publicly in addition to the indirect efforts through its members. There may be some social issues about which the Scriptures speak so explicitly and clearly that the institutional church deems it necessary to speak directly on the basis of God's Word. But there are great risks, as we have seen, in such direct speaking. Often this speaking is not appreciated, let alone heeded, by those outside the church. Moreover, it always carries the risk of politicizing the church. And so, from a practical standpoint and from the standpoint of the Gospel, direct speaking should be done infrequently, only on the basis of clear and unambiguous teachings of Scripture, where the church's most fundamental concerns are at stake.
- d. **Direct and Intentional Action (Top Down).** The fourth possible connection between the church and politics is highly controversial and risky—it is direct and intentional action. The church no longer relies on persuasion, as all three of the previous connections do. The church now directly acts to change policy or reshape society. It commits funds and applies political leverage—perhaps even lending its support to particular candidates. Direct action by the church is dangerous. It runs all the risks associated with "religious establishment" that have so dogged the church since the days of Emperor Constantine. Direct political action by the institutional church involves the exercise of civil power and that power has always had a corrupting influence on the church: Generally speaking, when direct action is called for it is much better for the church to let that be carried on by laity in their worldly roles or by voluntary associations that are distinct from the church. Bonhoeffer had an accurate intuition when he insisted that the assassination plot on Hitler in which he was involved—what a form of direct action! —be carried out by a loose association of Christians, not the church itself. Advocacy is usually more than persuasion (mere "speaking out," as in connection three above). Advocacy is usually a "working" of the machinery in our democratic political system. As such, it flirts with imposition and violation of conscience. Furthermore, this advocacy is not infrequent (as in Benne's third connection) but regular and on a long list of concerns—so regular, in fact, that it tends to desensitize recipients to the church's voice and jeopardizes principled participation from the "bottom up." This does not mean that congregations or church-wide assemblies cannot take a position on social issues, but only that such

speaking has its limitations. It is limited primarily to those who have already agreed to speak and hear God’s truth in love. It is also limited by the threat of polarization, since all public speaking on social issues in a democracy is partisan (that is, associated with one of the “parties” in the debate). Christians will never be of one mind on exactly how to implement their faith in good works—nor must they be, since the true unity of the church does not lie in such agreement. Yet neither can such agreement among believers be treated as irrelevant, and therefore ignored, since what is at issue is precisely those good works that God has commanded us to do. The “mutual conversation and consolation of brethren” spoken of in the Lutheran Confessions (SA IV) will contribute to Christian life in the world as well as to the strengthening of our faith in Christ. (pgs. 69 – 70)

#### #6 – UNRESOLVED ISSUES (Coming to terms with history)



#### **PLC MEMBER COMMENTS:**

- 1) Person “ABC” “Bad-mouthed the preschool and lost enrollment and tuition.”
- 2) **“The congregation threw her under the bus.”**
- 3) Person ABC **“feels it (the STAR Preschool launch) was a serious conflict in the church, but now water under the bridge.”**
- 4) These individuals have “always challenged their leadership and power.”
- 5) “I enjoyed Pastor Davis’s openness, but his warmth and soul could not get through the stiffness of congregation.”
- 6) “Pastor Kenneth was a great preacher but did not bring in many people.”
- 7) “Actually, we haven’t had a Shepherd (pastor) for the past 10 years.”
- 8) **“Too much polarization internally.”**
- 9) “Dumping occurs because we don’t have clearly defined roles.”
- 10) **“Pastor RZ incredibly involved and hands on. Pastor Mees and Davis were both hands off.”**
- 11) “I am still grieving Pastor Wally’s departure. He just left.”
- 12) **“Pastor RZ has not left. From what I could tell this cast a big shadow over Pastor Mees’ ministry.”**
- 13) **“We shoot ourselves in the foot.”**
- 14) **“We shoot our wounded and throw people under the bus.”**
- 15) Serious conflict in the church, but NOW WATER UNDER THE BRIDGE.
- 16) One member reported “severe trauma,” while another reported “no trauma at PLC.”

**PASTOR LEE'S COMMENTS:**

**COMMITMENT TO NEW DIRECTIONS IN MINISTRY** – characterized by the following issues and actions.

Wide ownership of and excitement about the shared vision for the future.  
 Getting a good match between the pastor and congregation.  
 Clean exit of interim pastor and consultant; good closure of the interim period.

<b>Symptoms of Non-resolution</b>	1	2	3	4	5	<b>Indications of Resolution</b>
Anxiety and rushing the search process			X			Increasing levels of involvement and ownership in process
Unrealistic or unclear expectations of the new pastor	X					Clarity and consensus on leadership style desired of new pastor
Inability to agree on moving forward		X				Willingness to say goodbye to prior pastor and unhealthy or ineffective processes and/or behavior
Low energy level, lack of humor					X	Evident energy and healthy humor
Failure to issue a call; discouragement with the process			X			Enthusiastic preparations for new pastor

Figure 21 - PLC Pastoral Readiness for New Directions in Ministry

**M**embers of PLC need to be able to move forward in God’s mission without being weighed down by unresolved issues. For PLC, some unresolved issues are from the past while others involve current conflict or grief (i.e., conflicts of interest, doctrinal identity). I observe the congregation is wrestling with what Dr. Peter Senge refers to as organizational “learning disabilities;” what Rev. Dr. Peter Steinke refers to as being “emotionally stuck;” and what the Lord calls “dwelling on the past” (Isaiah 43:18 – 19). The consequences reach beyond the immediate membership: new members are unable to assimilate into the closed system, while current members are curved inwards (tending to open wounds) and leadership struggles to understand the current ministry strategy, oversight responsibilities, and policies that need to be developed and monitored. There is little emotional time, energy, or strategic planning space to implement the congregation’s mission and ministries, let alone receive a new shepherd and his/her family. PLC is an exceptional church in that its mostly elderly members are



full of energy and enthusiasm. This energy and enthusiasm can be recruited toward better learning and behavioral patterns. At present, energy and resources are exhausted at the tactical and short-term planning level.

When organizational systems display learning deficits that become chronic, Senge calls these behaviors organizational “learning disabilities.” He maintains, “It is no accident that most organizations learn poorly.”<sup>15</sup> He acknowledges the challenges are both technical (obvious and easy to fix) and adaptive (not readily noticeable and the solution requires value and behavior change). “The way they are designed and managed, the way people’s jobs are defined, and, most importantly, the way we have all been taught to think and interact (not only in organizations but more broadly) create fundamental learning disabilities” explains Senge.<sup>16</sup> In his book, *The Fifth Discipline: The Art and Practice of the Learning Organization* he lists seven learning disabilities. Of the seven, two stand out for PLC in their efforts to avoid conflict and promote team learning:

- **A fixation on events, and**
- **The illusion of taking charge.**

These two learning disabilities have become pronounced as PLC is in transition between settled pastors. Senge effectively unpacks the organizational learning disability of being fixated on the event itself saying, “We are conditioned to see life as a series of events, and for every event, we think there is one obvious cause.”<sup>16</sup> Congregations do this when they simply replace one pastor with another, one secretary with another, one ministry effort with another. This is a linear approach (or machine model thinking). Senge further observes, “Focusing on events leads to ‘event’ explanations.”<sup>17</sup> He concludes, “Such explanations may be true as far as they go, but they distract us from seeing the longer-term patterns of change that lie behind the events and from understanding the causes of those patterns.”<sup>18</sup>

In making this observation Senge is making the fundamental distinction between technical and adaptive problem-solving approaches. The technical approach is the easy fix while the adaptive learning approach seeks a fuller understanding of the event. He observes there is value in technical learning, but it has limits. “If we focus on events, the best we can ever do is predict an event before it happens so that we can react optimally. But we cannot learn to create” Senge surmises.<sup>19</sup> “Generative learning” is creative learning, which many organizations lack the stamina for. Senge writes, “Generative learning cannot be sustained in an organization if



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<sup>15</sup> Senge, Peter, “The Fifth Discipline: The Art & Practice of the Learning Organization,” (Doubleday, a division of Bantam Doubleday Dell, 1540 Broadway, New York, NY 10036, 1990.), 18.

<sup>16</sup> Ibid.

<sup>17</sup> Ibid., 21.

<sup>18</sup> Ibid.

<sup>19</sup> Ibid., 22.



people’s thinking is dominated by short-term events.” Such insights make me, as a child of God, thankful for Biblical stories that date back to the beginning. So much learning and knowledge takes place through reflecting on God’s faithful providence throughout time and on man’s ultimate need of His care.

The second popular Senge learning disability I am observing at PLC is “The illusion of taking charge.” The gracious members of PLC already know this about themselves. They are eager to pitch in and solve problems. They are people of action.

In my twenty-five-year ministry, I have observed that churches typically have the tendency to reward first responders, people of action, and people who know their own mind. “Being ‘proactive’ is in vogue. Managers frequently proclaim the need for taking charge in facing difficult problems,” Senge observes. At PLC, such proactive behavior can shut off discourse and discourage involvement and learning. Yet it is very much encouraged and praised. This is readily noticeable when reviewing governing documents and job descriptions, and tracking email communications. Such take charge behavior can lead to only addressing partial concerns, provide immediate gratification, and create little forward movement for the church ministry. Senge concludes, “All too often, ‘proactiveness’ is reactivity in disguise.”<sup>20</sup>

- ❖ *Below I have listed six unresolved issues that regularly surfaced in either the one-on-one meetings, surveys, questionnaires, and/or in general conversation. It would behoove PLC to avoid getting bogged down in any one of these unresolved issues and fall prey to becoming event focused. Instead, look for the common a theme or pattern in these events. Why are these conflicts occurring? What commonalities do they share? For example, do all these issues appear to lend to the current state of fragmentation, or the “silo effect” at PLC?*



Members of PLC need to begin “speaking the truth in love” about past events and current concerns. These internal issues that have caused PLC conflict, or some level of brokenness, need to be confessed, forgiven, and healed, so that the Gospel mission can have free course. The theme verse on the second page of this Report is Hebrews 12:1 “Let us throw off everything that hinders...and run the race marked out for us.”



While some are convinced there is no need for healing or addressing any sort of grief from the past, these six critical areas seem to be causing consistent grief, or looping of unhealthy behaviors, for PLC members.

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<sup>20</sup> Ibid., 21.

## ***1. Pastoral Departures***



In the past 50 years, PLC has enjoyed pastoral care from three settled pastors and a host of supply pastors. The three settled pastors, Longest Term, Long Term, and Short Term all had a significant impact on the culture and DNA that makes PLC the church it is today.

**Pastor Longest Term** may have the greatest influence on the parish since his pastoral presence began in 1975 (46 years ago) and continues to the present. He has an enthusiasm about the ministry of PLC and the role he has been honored to have over the years. He is humbled to be recognized as Pastor Emeritus by the members of PLC. From time to time, he is included or consulted in leadership meetings and leads a weekly Bible study. Pastor Meyer, in fact, may be an unintentional “un-departed” pastor. His and the congregation’s legacy seem fused. Pastor Meyer remains the Pastor-teacher of the congregation. It is interesting to note Pastor Meyer is the only LCMS pastor PLC has had in nearly 50 years. The LCMS has been primarily experienced by PLC through the lens and ministry of Pastor Meyer.

**Pastor Long Term** served the congregation from 1982 – 2017 (35 years). Pastor Mees still interacts with the congregation, but unlike Pastor Meyer, does not hold formal membership at PLC. One member described that Pastor Mees was intentionally going to leave when he retired, but it felt more like a cutting off than a healthy separation. Another summarized, “He didn’t want to do what RZ had done. When he retired, he would leave.” Even Pastor Mees has not fully departed: he is regularly consulted on PLC ministry, confirmation instruction and retreats, and he is leaned on routinely for pulpit supply.

Together, Pastors Longest Term and Long Terms have over 81 years of ministry at PLC. They love the congregation, and the congregation loves them. Pastor Mees seems aware of the undeparted-pastor dilemma, yet both pastors are the regular go-to-guys for PLC in a pinch. In a larger parish with different personalities this may not be an issue, but in a family sized church their presence is impactful. Finding a healthy balance between completely “cutting off” and actively providing pastoral leadership will be a blessing to all. There is no reason for these dear pastors to discontinue fellowship and worshipping at PLC. The key will be implementing healthy boundaries when it comes to providing pastoral care and leadership to the PLC flock, in both public preaching/teaching and private care ministry.

**Pastor Short Term** served from January 2017 – June 2019. In Pastor Term, PLC called a pastor who was the opposite in almost every way from the pastors they had had for the past 45 years. One member believes: “The Call process for Pastor Short Term was done unilaterally by the Committee. And therefore, the odds were stacked against Pastor Short Term from the beginning.” Despite assertions to the contrary, Pastor Davis’s short-term pastoral ministry appears to have had little influence on the congregation’s current state. His brief two-and-half year stint



was filled with unexpected challenges which together he and the congregation were ill equipped to manage. Many of the “family issues” have been shifted onto Pastor Davis and he unintentionally functions as a “scapegoat.” He literally left and carried away (temporarily) the “sin” of the people. Yet, Pastor Short Term is no Messiah (no pastor is), so the behavioral patterns are bound to reemerge.

In summary, there has been a multitude of blessings and some controversy with all three pastors. Uniquely, Pastors Longest Term and Long Term remain included in congregational email lists, pictorial directory, pulpit supply, etc. while Pastor Short Term is not. PLC and her departed pastors have struggled in the practice of saying formal good-byes. The same could be said for the departures of multiple staff members mentioned below in number 3. The congregation remains challenged to emotionally separate from their beloved pastors to intentionally create space for a new pastor and new leadership to emerge.



## ***2. Conflicts of Interests***

Conflicts of interest exist in almost every church ministry, especially Lutheran churches with schools. The key is that when these conflicts occur, they are formally reported out. Staff should not serve on boards that oversee their own position on staff; employees should not be hired by family members nor supervised by family members; and family members of staff serving on boards should be recused from voting on matters that could impact their family members on staff. One PLC member complained, “These pet projects get no attack” or critical review. Additionally, resources get redirected to support pet projects.

## ***3. PLC Staff Departures and Replacements***

There has been 100% staff turnover in the last 5 to 7 years, with a total staff replacement and partial staff reduction. This is not something to lose confidence over, but something to learn from. Not incidentally, the “New Staff” consists of Council and Elder members and their relatives. This is hardly unusual in a family sized church, but something to consider if culture-change for growth is the goal.



Some circumstances surrounding a couple of the departed staff persons have left residual feelings of grief: The Youth Director was fired around 2016 and the Music Director in the Spring of 2019. These “firings” created wounds that have not yet healed. One leader describes, “I’m still very hurt. These are people who have more say than others. And they swept these people under the rug.”

**Pastor Short Term’s resignation:** Some would describe Pastor Short Term as PLC’s

“unintentional interim minister” or “after-pastor.” A healing service to address racist comments Pastor Term’s daughters encountered was conducted on May 5, 2019. Pastor Short Term states that while serving PLC, he felt like a hired hand, a chaplain passing through. In his view, he was there to assist members with their personal concerns, but not empowered to rally them and PLC resources to reach out to needs of community. He reflected, “They say they want to grow, increase programs, but there is no urgency and no commitment to follow through.”

#### ***4. Dual-Denominational Membership***

Pastor Davis concluded, “The LCMC and LCMS joint congregation venture does not work. It may have 50 years ago, but it does not today.” He describes instead that, “When something is not working members are pushed into corners. It’s not a mixed marriage that works.” I agree. The joint-denomination congregation is bragging rights for its originators, but it does not currently serve the members of PLC well. It may be that the two denominations have drifted further apart over the years. Pastor Davis even described how he knew which denomination a member belonged to by which side of the sanctuary they sat on. “Dual membership creates a power-struggle. But PLC attempts to give the impression they are beyond that.”

Historically, the formal agreement was to rotate pastors between the two denominations, but a vote was taken at some point to no longer honor the agreement. There is confusion over whether governing documents allow for this change. In essence, the change means the majority side of the partnership can favor pastors from their side. When the change from ELCA to LCMC was made, some say the LCMS side was supposed to join the LCMC “in the middle.” The LCMS side did not follow through with this proposed fix but stayed committed to the original agreement. One member noted, “People choose their membership based on relationships more than doctrine.”

PLC members have an opportunity to put their Christian faith in action when addressing how to move forward in peace and unity. The Apostle Paul says, *“Instead, speaking the truth in love, we will grow to become in every respect the mature body of him who is the head, that is Christ”* (Ephesians 4:15). Some feel the LCMS doctrine is too conservative and judgmental. There are a few members (including Pastor Meyer) who feel disrespected and unloved by LCMS President Matthew Harrison. Some feel the LCMC doctrine and practice is too secular and political. These concerns have resulted in a feeling of disunity at PLC. The tension over LCMS and LCMC doctrine and practice are felt, both among PLC’s members and between PLC’s members and the LCMS. It will be a blessing for PLC to address these concerns in Christian love and truth.



The relational and doctrinal tension between PLC and the LCMC and PLC and the LCMS is represented below as “denominational linkages.” (Interestingly, no tensions are noted with the LCMC, ELCA, or ALC. This may be due to the fact these Lutheran bodies are more of an association of believers than a body of believers with a unifying confession of faith.) Denominational linkages scored at 1.3 out of 5, as charted below.



**RENEWING DENOMINATIONAL LINKAGES** – characterized by the following issues and actions.

Healthy partnership with the denomination, District, or synod. Authority, dependency, interdependency, and counter-dependency. Congregation's tendency to see or denomination/synod through former pastor's eyes. History of the relationship, dollars, and trust; shared mission.

<b>Symptoms of Non-resolution</b>	1	2	3	4	5	<b>Indications of Resolution</b>
Resistance to denominational or District/synod requests or suggestions			X			Willingness to accept help and resources
Criticism of District / synod personnel and programs	X					Appreciation for the District/synod's traditions and mission
Failure to meet pledges and budgets				X		Denomination's resources and facilities are used
"We-they" outlook		X				Stable or increased giving to denomination; dollars and people

Figure 22 - PLC Pastoral Readiness for Collegiality and Collaboration with the LCMS

## 5. Revive LA and STAR Preschool (#5 & #6)

Both Revive LA and STAR Preschool are often referred to as “daughter” ministries, birthed by PLC. But neither PLC nor the daughter ministries behave like parent-daughter ministries, nor did PLC birth either of these entities as ministries of PLC. Consequently, there are no formal, ministry-related descriptions of what these relationships/partnerships are meant to be or become. There is certainly no obvious alignment with PLC’s overall Vision. While STAR Preschool does have a “**Preschool Agreement – 2020-2021**” document in place, Revive LA has no ministry agreement with PLC, and no governing documents or ministry descriptions. Ultimately, these two entities function on PLC campus as silos doing their own thing.



Revive LA was birthed around 2015 – 16. Some believe this ministry forced the termination of a family life and youth minister. That is, PLC could not afford to launch a new community ministry (Revive LA) while at the same time cover the cost of the family life and youth minister. It is reported that PLC gifted Revive LA \$30,000 with a \$500 monthly stipend to help it get going. Some members hope to better understand if this ministry belongs to PLC and was meant to assist



PLC as an outreach ministry of PLC or if it is meant to be a stand-alone and separate ministry. Other members question, "If Revive LA is a stand-alone ministry, why did PLC give such generous financial support in lieu of supporting an existing church worker dedicated to outreach, families, and youth for the benefit of ongoing ministry at PLC?" At one point, Revive LA held services at a separate location, but due to the cost of rent, came back to use PLC facilities.

On incorporating STAR Preschool, another member noted: "The decision and process to come to the decision both were done poorly. The decision was primarily about the money. However, no proper cost benefit analysis was/has been done. Are we better off now than we were?"

Some wonder if PLC and these two entities are in the boat together and what that looks like; or if each ministry is surfing alone catching a ride off the other when possible. This is an exciting time to explore those opportunities. There is incredible opportunity for ministry partnership, but this will require collaborating in purpose and resources. The

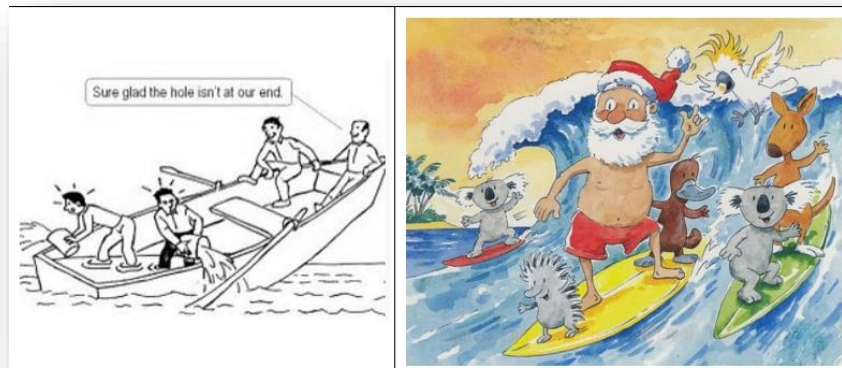


Figure 23 - One PLC member said: "It seems we are just a discombobulated bunch of separate individuals with different ideas and goals trying to keep afloat."

LCMC pastors serving Revive LA and the LCMC/LCMS pastor serving PLC would benefit from teaming together on staff. The same can be said of STAR Preschool leadership: one PLC campus ministry, one staff, and one purpose. Exploring how to integrate and leverage these ministries (given how small PLC, Revive LA and STAR Preschool are on their own) could experience exponential benefits through proper alignment of purpose and resources. Each of these ministries is in a different life cycle stage. Revive LA and STAR Preschool are closer to their reproductive years and PLC to "Old Age." PLC offers incredible stability and resources and the other two offer energy and innovation.

**Consider the following practical theology questions:**

- 1) What might to bear one another's burdens (sin, shame, and guilt) look like?
- 2) Where is repentance and forgiveness needed?
- 3) How might bearing one another's burdens change the relationship between PLC and the LCMS?
- 4) How might bearing one another's burdens change the greater community of faith?

## #7 – COMMUNITY OUTREACH – YOUNG FAMILIES

### PLC MEMBER COMMENTS:



- 1) “No activities for kids and young adults.”
- 2) “Continue community connections: virtual services, show appreciation to volunteers; find activities to encourage young people (volleyball, music, etc.); encourage new families thru pre-school to join church; continue ‘holiday with community’; Octoberfest; Orchestra Concert, handing out water to hikers; and July 4<sup>th</sup> Parade.”
- 3) “A family center was to be established.”
- 4) “PLC members are hopeful and wonder if the STAR Preschool will compliment PLC?”

### PASTOR LEE’S COMMENTS:

The current family and youth ministry context at PLC is a project-rich environment. While PLC members and leaders recognize the need to support families and youth in a secular-atheistic society, family and youth concerns are far down on the list of concerns (#6) while PLC spends its time managing what concerns appear more immediate. A couple of good ideas have been proposed: a children’s church ministry and a combined youth ministry with associated congregations. PLC will be in a better position to make strategic decisions by completing the GIST tool at the congregational level and in conjunction with the other congregations in exploring the partnership possibilities. The GIST tool will assist leaders in each congregation evaluate where there is ministry overlap, or complementary opportunities. The goal for PLC should be focusing on developing a short-term plan for ministering to families and their youth currently entrusted to her care.

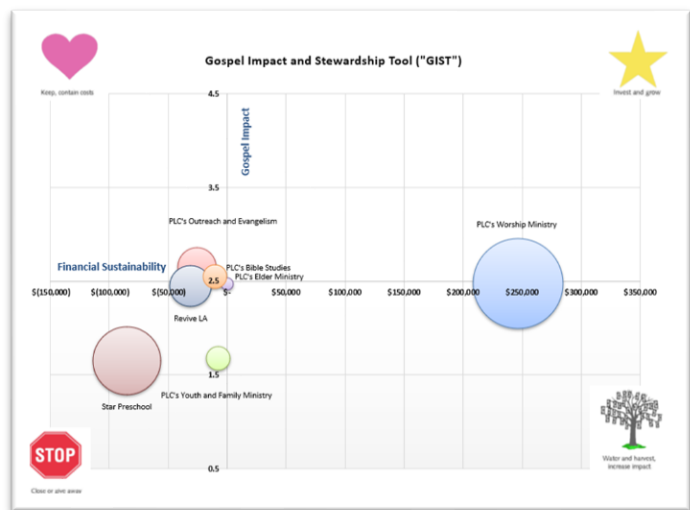


Figure 24 - PLC GIST Ministry Map (rough draft for illustration purposes only – see footnote 13)

## #8 – VOLUNTEER ENGAGEMENT & COORDINATION

### PLC MEMBER COMMENTS:



1. Too much “Volunteering in helping other congregations.”

### PASTOR LEE’S COMMENTS:

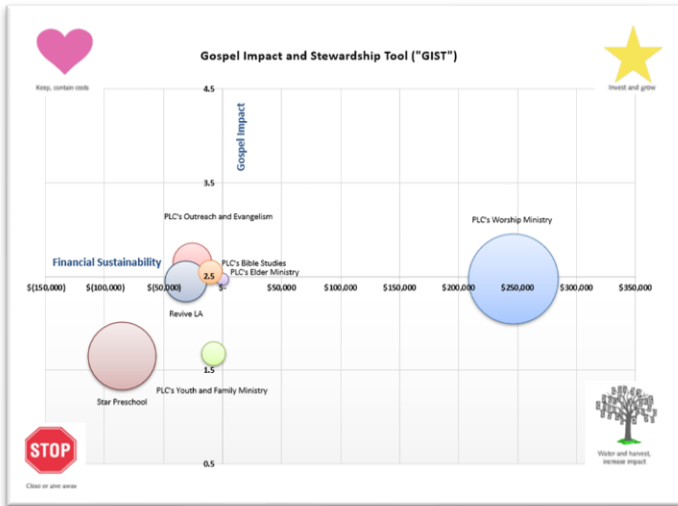


Figure 25 - PLC GIST Ministry Map (rough draft for illustration purposes only – see footnote 13)

While PLC members infrequently referenced the term “volunteers” they certainly had a lot to say about volunteers. For the most part, the consensus is there is too much to do with too few people and too little coordinated leadership. Many of these concerns will be addressed when addressing member concerns one, two, and six (church governance, leadership, strategic ministry plan, and unresolved issues).

As mentioned in the Strategic Ministry Plan section, each frontline ministry represented

on the GIST ministry map may be supported by hundreds of “volunteer” hours each year. Authors Zimmerman and Bell note that “adding financial equivalents for volunteer time” with staff salaries “the matrix map will provide a clearer picture of the resources necessary to accomplish the impact.”<sup>21</sup>



<sup>21</sup> Ibid., Zimmerman, Bell, 110.



## #9 – REVIVE LA & STAR PRESCHOOL

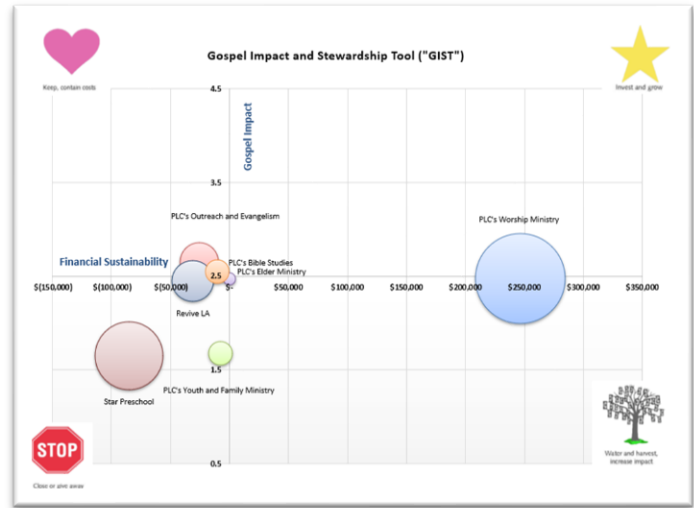
### PLC MEMBER COMMENTS:



- 1) “STAR Preschool is not ideal with no Christian program, but it is potentially useful to spread the Word.”
- 2) “We think Revive LA church is also OK to keep.”
- 3) “How can PLC and Revive LA work together without diluting the membership further?”
- 4) “How do we coordinate with Revive LA contemporary service?”
- 5) “Revive LA is more like a stepchild. There is little integration, assimilation, and alignment with PLC.”
- 6) “The fact that Revive LA pastors are not ordained seems to be a game-stopper for PLC members.”
- 7) “Prior to STAR Preschool the Lutheran preschool was not being managed well.”
- 8) “PLC is subsidizing a secular preschool.”
- 9) “Revive LA and STAR Preschool do their own thing.”
- 10) “Joe and Cyndi have jumped in when PLC really needed them.”
- 11) “We need a common goal with plans to get there.”
- 12) “I think they (Revive LA) are helping us stay alive. Cyndi and Joe have a lot of energy. Would be nice if it were more integrated.”

**PASTOR LEE'S COMMENTS:**

As frontline ministries, STAR Preschool and Revive LA will get ample review under Sections 4 (A Strategic Ministry Plan) and 6 (Unresolved Issues). PLC will be in a better position to make strategic decisions about STAR Preschool and Revive LA by completing the GIST tool. The GIST tool will assist PLC leaders evaluate how best to align all existing ministries toward PLC's overall Vision to feed the sheep and to seek and save the lost.



*Figure 26 - PLC GIST Ministry Map (rough draft for illustration purposes only – see footnote 13)*

## #10 – WORSHIP SERVICES & BIBLE STUDY

### **PLC MEMBER COMMENTS:**



- 1) “Members are too casual about worship – more interested in social activity, such as, sharing of the peace and fellowship.”
- 2) “Should return to in-person worship starting to conform to the world.”
- 3) “Desire for more traditional worship services by many and desire for more contemporary, non-denominational-style services by many.”
- 4) “Re-commit to study the Word together, worship and praise and pray together...”.
- 5) “Add more services to meet different needs.”
- 6) “I would like to see more small group ministries.”
- 7) “The Pastor should in preaching and teaching help congregation see how the OT stories are connected to the NT stories.”

**PASTOR LEE’S COMMENTS:**

PLC is fragmented – too many pastors, too many teachers, too many doctrines. This is seen most readily in worship and Bible study. In fact, an old worship service bulletin had listed as “Pastor – all members.” The presenting problem that gets the most attention is whether to have a traditional or contemporary worship service with traditional or contemporary music. Traditional or contemporary styles should be secondary to what PLC believes.

The “too many cooks” problem is also seen in ministry programs, such as STAR Preschool, Revive LA, and Westside Ministry Network. As stand-alone ministries each has value, but they all operate in silos and often compete with one another. PLC has a small membership size and finite resources. PLC attempts to do many things but is challenged to execute any of them well. PLC further lacks the upfront planning to align new ministries in a strategic and complementary manner with PLC’s overall mission and vision. PLC has a great opportunity to see God at work through the self-study and IIM process. The first place to start is with doctrinal and denominational identity (doctrine and practice).



## RECOMMENDATIONS FOR CONGREGATIONAL SELF-STUDY

The PLC Prioritization Chart helps to focus the congregational self-study. The PLC Prioritization Chart below illustrates how addressing the top six issues has the effect of addressing nearly 81% of PLC's concerns, as shown by the orange line.

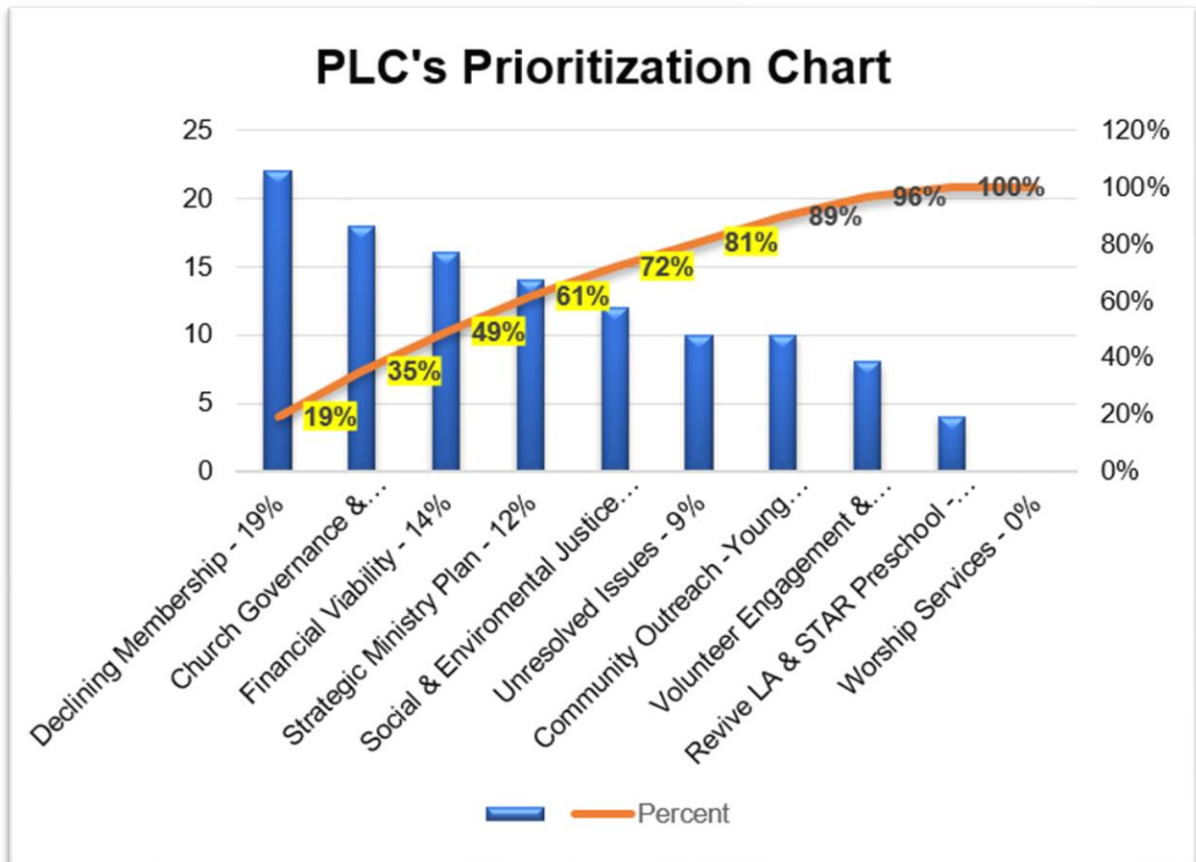


Figure 27 - Prioritizing PLC's Concerns

While **Declining Membership** is the primary concern for PLC, declining membership may be best addressed as a derivative of other concerns. Likewise, **Financial Viability** will be addressed as it applies to aligning resources for frontline ministries in **Strategic Ministry Planning**. Consequently, the four critical concerns, **Church Governance and Staffing**, **Strategic Ministry Planning** (including the GIST financial stewardship portion), **Social and Environmental Justice** (doctrine and practice), and **Unresolved Issues** (including coming to terms with history) are the recommended self-study subject areas.

## RECOMMENDATION #1 – CHURCH GOVERNANCE AND LEADERSHIP

Healthy congregations develop clearly defined leadership roles and boundaries to avoid a design set up for conflict and confusion. Without a clear governance structure, leadership experiences power struggles and passive-aggressive behaviors. There has been conflict and confusion over lay and pastoral leadership roles and styles, leading to control issues and passive aggressive behaviors. A clearly defined ministry Vision (strategic ministry plan) and a clearly defined church governance structure could help with defining roles and boundaries.

A big part of leadership is understanding the lay of the land. **It will be important for PLC to determine the congregational size category that makes sense.** Is PLC more comfortable as a family-sized, pastor-sized, program-sized, or corporate-size congregation depending on their Vision for ministry and resources? Each category size requires unique pastoral and lay leadership skills. Likewise, **understanding which congregational life cycle stage PLC operates in will help inform which leadership style is required: managerial or transformational.**

## RECOMMENDATION #2 – STRATEGIC MINISTRY PLANNING

This recommendation is about Vision casting. Having a clear sense of Vision will aid in embracing a path forward to focus and align each ministry. Without aligning resources around a common Vision, many ministries have been birthed (some at cross purposes) and resources are stretched.

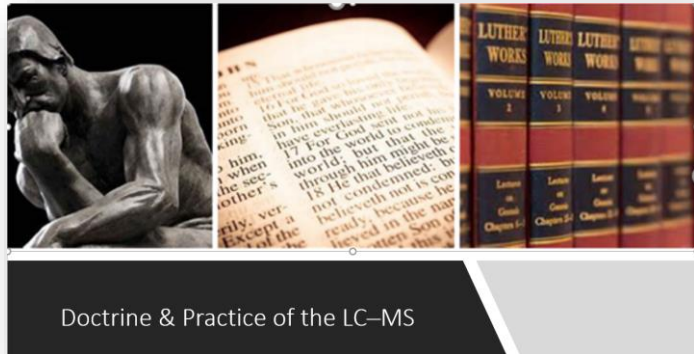
Discussions about mission impact are often difficult since every ministry is important to someone. While this may be true, each ministry has different levels of current and potential Gospel impact. Without wanting to criticize worthwhile programs, PLC will want to assign each ministry to one of four groupings: invest and grow, keep, and celebrate, keep watering, and close or give away. This mapping processing will help PLC decide how to steward resources for both strategic Gospel impact and financial viability.

### RECOMMENDATION #3 – SOCIAL AND ENVIRONMENTAL JUSTICE (Doctrine & Practice)

The doctrine and practice of the Christian church is intended to promote the central figure of Scripture, Jesus Christ. The faithful use of God’s Word keeps Christ central while also promoting unity in His body, the church. Appendix A is a useful chart showing the differences between how the ELCA and LCMC think about church and God’s Word. Adding the LCMS to the chart may be a helpful exercise. PLC should use this self-study time to rethink what it means to be church and how best to practice our faith in the world.

The Apostle John writes, “In the beginning was the Word, and the Word was with God, and the Word was God. He was with God in the beginning. Through him all things were made; without him nothing was made that has been made.” (John 1:1-3). The “Word” is a reference to Christ who was “in the beginning” and “was with God” and “was God.”<sup>1</sup> For this

reason, Luther says, “In the Church everything should be done in accord with the Word of God; in other words, everything should be ruled by God’s Word as norm.”<sup>2</sup> Christ must remain central whatever the Church does in relation to temporal justice and equity, otherwise such efforts only become clever schemes of the devil, the world, and man.



Doctrine & Practice of the LC-MS

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<sup>1</sup> John 1:1.

<sup>2</sup> Quoted in (Pieper 1950), vol. III, 462.



## RECOMMENDATION #4 – UNRESOLVED ISSUES

Six main unresolved issues at PLC are:

1. Departed and Undeparted Pastors
2. Conflicts of Interests
3. Staff Departures and Replacements
4. Dual-Denominational Membership
5. STAR Preschool
6. Revive LA

Completing Recommendation #2 and the GIST tool will aid in working through issues related to STAR Preschool and Revive LA. Completing Recommendation #3 will aid in resolving issues related to dual-denomination membership and social activism. Consequently, the TTF team working on Recommendation #4 should spend their time on numbers 1-3: identifying patterns of behavior, coming to terms with history, speaking the truth in love, working through grief (or lack of grief) over relationships with loved-ones, and determining if any confession/absolution is necessary.

## CONCLUSION

### TRANSITION TASK FORCE (TTF)

The Transition Task Force (TTF) will be used by God to guide the congregational self-study and help the congregation “grow to become in every respect the mature body of him who is the head, that is, Christ.” (Ephesians 4:15).

To solve some organizational learning disabilities, like the Silo Syndrome, event focused, and the illusion of taking charge, Dr. Karl Albrecht has identified at least four strategies leaders can use to make their organization smarter and achieve its mission in a changing environment: “Indeed, these four key enablers ... can provide the means for moving the organization steadily toward ever higher levels of collective intelligence.”<sup>3</sup>

1. **Thought Leaders.**<sup>4</sup> These are the people willing to reach intellectually beyond the organization’s norm. He notes, “Their breadth of view, conceptual skills, and ability to

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<sup>3</sup> Karl Albrecht, “Organizational Intelligence and Knowledge Management: Thinking Outside the Silos,” 15. [[OI-WhitePaper-Albrecht.pdf - OneDrive \(live.com\)](#)]

<sup>4</sup> Albrecht, “Organizational Intelligence,” 15.

see through the fog of argument and discern the few really key variables and priorities in situations makes them unusually effective in whatever jobs they are assigned.”

2. **Communities of Interest.**<sup>5</sup> The combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.
3. **Ad-hocracies.**<sup>6</sup> Sometimes a difficult or intractable organizational issue requires a special “hit squad” to solve it. Many organizations use ad-hocracies: specialized and transitory teams, task forces, committees, or advocacy groups assembled to attack an objective. Ad-hocracies tend to be most effective when they are few, small, well-focused, led by competent thought leaders, and politically powerful.
4. **Knowledge Platforms.**<sup>7</sup> These days, every organization of significant size or complexity needs a sophisticated and continuously evolving IT infrastructure to support the process of knowledge deployment: e-mail systems that support community building, websites, and finger-tip availability of mission-critical data, i.e., online resources and tools custom-designed to support the achievement of individual communities of interest.



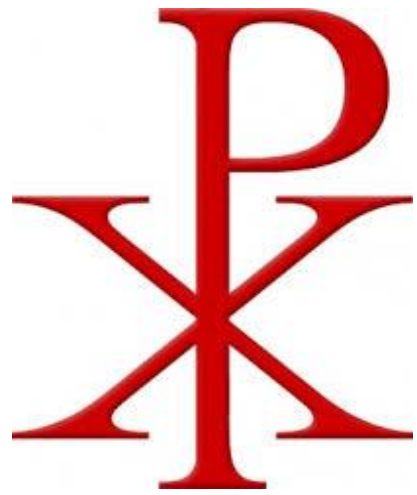
After one month of training, the TTF will host three months of cottage meeting series on three different topics, one topic per month. The TTF will consist of 12 members, divided into three teams of four. Each team will take a topic to study for a month. Then, after all teams have conducted their study, the *TTF Final Report with Recommendations* will be published to the members of the congregation. Then a townhall meeting will be held to discuss the implications of accepting the TTF’s recommendations. Following the townhall meeting, there will be a voter’s assembly to vote on which of the TTF recommendations will be approved. (See **Figure 28**, IIM Process Map, page 64.) The *TTF Final Report with Recommendations* will provide guidance and recommendations to the congregation on how to heal and move forward in truth and Christian love. Remember, Psalm 37:5 says, “Commit your way to the Lord; trust in him and he will do this: He will make your righteousness shine like the dawn, the justice of your cause like the noontday sun.”

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<sup>5</sup> Albrecht, “Organizational Intelligence,” 15.

<sup>6</sup> Albrecht, “Organizational Intelligence,” 15–16.

<sup>7</sup> Albrecht, “Organizational Intelligence,” 16.



## Appendix A – LCMC & ELCA COMPARISON TABLE

How does LCMC compare with the ELCA?

Comparison	ELCA	LCMC
Definition of Church	The "Threefold Expression" assumes that "the Church" includes offices and legislative assemblies. ELCA officers refer to it as "a Constitutional Church."	Affirms the Augsburg Confession: "The Church is the congregation of saints, in which the Gospel is rightly taught and the Sacraments are rightly administered." LCMC is a Confessional Church.
Statement of Faith	ELCA & LCMC have nearly identical statements of faith in their constitutions.	
Authority of Scripture	Scripture is "the authoritative source and norm." In practice the ELCA modifies the witness of Scripture by appeals to context and experience. (e.g. Sexuality Social Statement.)	Scripture is "sole rule and norm." LCMC takes the use of Biblical texts throughout history very seriously.
How does one receive salvation?	Depends whom you ask. Some official publications and websites speak of salvation for the whole world, regardless of faith.*	Salvation is through Jesus Christ alone, given to us by grace through faith in him.
Women pastors?	ELCA and LCMC are the only Lutheran Church bodies in the United States that affirm the call of women to be pastors.	
Non-celibate Gay pastors?	Yes.	No. A congregation which called a pastor in violation of the Ministry Standards would be removed from the association.
Call Process	Only those candidates approved by the ELCA and nominated by your bishop can serve as your pastor. Background checks are by the Synod office.	A congregation has the freedom to call whomever it chooses to serve as their pastor. Websites and a network of contacts help provide congregations with names of pastors to consider. Background checks are by congregations.
Structure?	A "threefold expression" of congregation, synod and national body, which are "interdependent."	An Association of Congregations with a flat organizational structure.
How are benevolence dollars handled?	Benevolence dollars are sent to the Synods, which use about half the money for their administration and local missions; the other half is sent to churchwide. That money is used for its administration expenses and other ministries.	Congregations are encouraged to give some money for the administration of LCMC. All other benevolence money is distributed by local congregations to the ministries of their choice: local, regional and/or international.

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Comparison	ELCA	LCMC
Worship and Liturgy	Congregations are given "guidelines" and published resources which tend toward political correctness, gender-neutral language, and ecumenical theology.	Congregations are free to choose and structure their worship services in their local setting. A variety of resources are available, including ReClaim Lutheran Worship Resources.
Educational material	Augsburg Fortress is the official publisher for the church.	Free to choose from a variety of resources, including A-F, CSS, Concordia, Group, Logos, ReClaim Resources, Sola Publishing, etc.
Seminary and lay Education	Eight seminaries; some synods operate a Lay School of Theology	Currently working with 11 seminaries; some students in training at ELCA seminaries; Institute of Lutheran Theology, Beyond the River Academy, and others provide additional educational opportunities for all.
Youth	Churchwide youth office schedules national and regional conventions.	Local congregations take responsibility for organizing national and regional gatherings and invite other members of the Association.
Women's organization	WELCA is funded by mission dollars and operated out of the national headquarters.	Women of the Word (WOW) is a small but growing, grassroots organization.
Camping	Most synods own and operate church camps.	Free to support any Bible camp program that the congregation deems faithful. Some camps are operated by LCMC churches.

\* ELCA universalism is documented, among other places, at <http://www.elca.org/What-We-Believe/New-or-Returning-to-Church/Dig-Deeper/Salvation.aspx>

Compiled by Tony Stoutenburg, Pastor of Grace Lutheran Church, Hayward, WI, with a lot of help from his friends. 2/6/2010

*Figure 28 - Adding a column for LCMS would be beneficial*

## Appendix B – IIM Process Map

Branch Name	Duration	Start	End	Completion	
<b>PASTOR LEE'S REPORT as of 1/15/2021</b>	<b>261 days</b>	<b>12/18/2020</b>	<b>12/17/2021</b>	<b>0%</b>	
<b>• JOINING PHASE (Months 1 - 3)</b>	<b>50 days</b>	<b>2/1/2021</b>	<b>4/9/2021</b>	<b>0%</b>	
One-On-One Interviews / Congregational Systems Inventory (CSI)	43 days	2/1/2021	3/31/2021	0%	
• Staff Professional Development	50 days	2/15/2021	4/23/2021	0%	
Form a Senior Leadership Team (SLT)	5 days	2/15/2021	2/19/2021	0%	
All Ministry Team Meetings (Quarterly Team Huddles)	10 days	3/18/2021	3/31/2021	0%	
Townhall Meeting #1 - Chafin-Schultz Inventory (CSI)	1 day	4/12/2021	4/12/2021	0%	
IIM 1st Quarter Report	22 days	4/1/2021	4/30/2021	0%	
<b>• LEARNING PHASE (Months 4 - 9) (SELF-STUDY)</b>	<b>6 mths</b>	<b>5/1/2021</b>	<b>10/15/2021</b>	<b>0%</b>	
Transition Task Force (TTF) Installation	0 days	5/23/2021	5/23/2021	0%	
• TTF Training	21 days	5/3/2021	5/31/2021	0%	
TRAINING SESSION 1 - Systems Theory and Thinking	1 day	5/10/2021	5/10/2021	0%	
TRAINING SESSION 2 - Focus Area: Mission, Vision and Alignment	1 day	5/13/2021	5/13/2021	0%	
TRAINING SESSION 3 - Focus Area: Leadership	1 day	5/17/2021	5/17/2021	0%	
TRAINING SESSION 4 - Focus Area: Theology and Practice	1 day	5/21/2021	5/21/2021	0%	
TRAINING SESSION 5 - TTF Roles, Responsibilities and Timeline	1 day	5/24/2021	5/24/2021	0%	
TEAMING WITH PSD DISTRICT	1 day?	6/7/2021	6/7/2021	0%	
• TTF COTTAGE MEETING SERIES	66 days	6/1/2021	8/31/2021	0%	
JULY - TOPIC #1 TBD	22 days	6/1/2021	6/30/2021	0%	
AUGUST - TOPIC #2 TBD	22 days	7/1/2021	7/30/2021	0%	
SEPTEMBER - TOPIC #3 TBD	22 days	8/2/2021	8/31/2021	0%	
TTF FINAL REPORT AND RECOMMENDATIONS	22 days	9/1/2021	9/30/2021	0%	
TTF TOWNHALL #2 (Facilitated by Pastor Lee)	1 day	10/7/2021	10/7/2021	0%	
<b>• IMPLEMENTATION PHASE (possibly Months 10 - 11)</b>	<b>2 mths</b>	<b>10/24/2021</b>	<b>12/17/2021</b>	<b>0%</b>	
Voter's Meeting	1 day	10/24/2021	10/25/2021	0%	
• Create An Accepted Implementation Plan	1 day?	10/25/2021	10/25/2021	0%	
What belongs to Council?	1 day?	10/25/2021	10/25/2021	0%	
What belongs to Staff?	1 day?	10/25/2021	10/25/2021	0%	
What is shared?	1 day?	10/25/2021	10/25/2021	0%	
• Launch Project Improvement Teams	0 days	10/25/2021	10/25/2021	0%	
Analyze the implementation setting, that is, the climate for change.	0 days	10/25/2021	10/25/2021	0%	
Decide how to organize the implementation effort.	0 days	10/25/2021	10/25/2021	0%	
Develop an implementation plan covering activities, responsibilities, deadlines, and so on, and have it accepted.	0 days	10/25/2021	10/25/2021	0%	
Communicate with and create ownership of changes by those affected by them and by those who will implement them.	0 days	10/25/2021	10/25/2021	0%	
Implement the ministry solution.	0 days	10/25/2021	10/25/2021	0%	
<b>• DEPARTURE PHASE (Month 12)</b>	<b>6 wks</b>	<b>12/18/2020</b>	<b>1/28/2021</b>	<b>0%</b>	
• Assess the Ministry Effects	25 days	12/18/2020	1/21/2021	0%	
Senior Pastor Departure	25 days	12/18/2020	1/21/2021	0%	
Review Congregational Vote	25 days	12/18/2020	1/21/2021	0%	
• Ministry Safeguards	25 days	12/18/2020	1/21/2021	0%	
Senior Leadership Team (SLT) Succession Plan	25 days	12/18/2020	1/21/2021	0%	
Behavioral Covenants (2 - Congregation and Kansas District)	25 days	12/18/2020	1/21/2021	0%	
Shepherding Flocks Ministry (Board of Elders)	25 days	12/18/2020	1/21/2021	0%	
Review Assign Approved Recommendations to BOD or Staff	25 days	12/18/2020	1/21/2021	0%	
Call Readiness Report and Close	21 days	12/18/2020	1/17/2021	0%	

Figure 29 - IIM Process Map as of March 2020

## Appendix C – Organizational Chart (Current State)

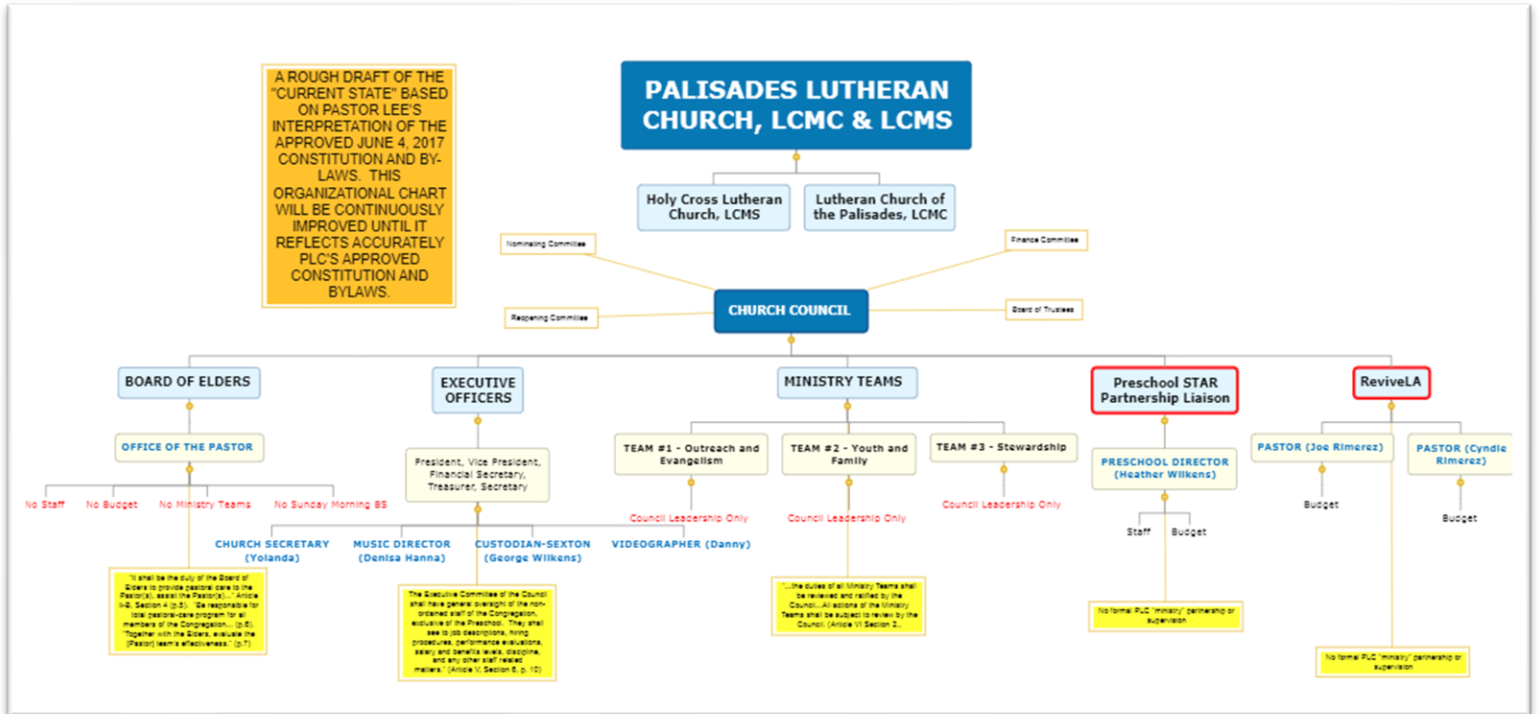


Figure 30 – PLC's Current State Organization Chart developed by Pastor Lee.

## APPENDIX TWENTY-FIVE

### PSD PRESIDENT FEEDBACK, MAY 12, 2021

Martin,

I finally had the time to do a thorough read on your report (the benefit of resuming travel and hotel-time). Wow – you have been busy! Your observations, summaries, and recommendations are excellent. I believe that your ability to quickly and clearly “see” the challenges and opportunities at PLC is evidence that the Holy Spirit definitely brought you to this group of saints for such a time as this. Thank you for your honesty and relational ability to say the “hard things” with grace. While I know that RZ’s presence and influence can be challenging, I am also thankful for your grace-filled approach to your “IIM Grandfather.” (Personally, I’d like to put in an order for another 10 “Marty Lees” to strategically assist congregations who desperately need to find a way forward.)

Please know that I am very willing and available to participate with you and PLC whenever you feel it is helpful – or to stay away if that is the most helpful thing I can do. It was clear to me early on in my DP tenure that there is a significant mistrust of LCMS and District from the past. I pray that the meetings and conversations I’ve had prior to your arrival cracked open the door for improvement in the relationships between PSD and PLC. I am confident that your competent leadership will continue enable the difficult conversations to happen, bring unity in faith and practice, and prepare them to see what God might have for them.

Thank you for saying, yes to the challenge and opportunity at PLC.

Be sure of my continued prayers and support.

In Christ,

Mike



## APPENDIX TWENTY-SIX

### TOWNHALL MEETING QUESTIONS & ANSWERS,

Dear PLC Members,

It is another beautiful day that the Lord has made, here in the Palisades! A big thank you to everyone who participated in the one-on-one interviews, completed the surveys, and are now engaging the content of the 1st Quarter Report. Hopefully, it is a good reflection of the items that are important you. There will be places that the “stories” do not seem “accurate.” That is okay, since the stories were told from diverse viewpoints. Over the next six months, through a thoughtful IIM process, we will have a chance to clarify and define our stories to be well-prepared for committing to directions and beginning the Call process for PLC’s next settled pastor

Please join me for a 1st Quarter Report Town Hall meeting on Monday, May 17 at 7pm. If you are unable to make it at 7pm for the main event, I will host a smaller session at 1pm that same day. The Town Hall will be an opportunity to give a general overview of the 1<sup>st</sup> Quarter Report and what to expect from IIM Phase Two – “Congregational Self-Study. In preparation for the Town Hall, please read the below general questions and answers.

[Introductory Remarks at the Town Hall meeting held over Zoom: In preparing the IIM 1<sup>st</sup> Quarter Report, my objective was to be a faithful lens, describing Palisades Lutheran Church as the members see it – the themes and narratives reported by members as important to them. PLC members graciously took the time to provide over 25 pages of feedback and questions to the 1<sup>st</sup> Quarter Report, which we are going to discuss in this 90-minute Town Hall meeting. We are not going to be able to answer every question you may have today, but we will make best efforts. However, every question that has been submitted is included below, either directly or as a compilation of multiple questions. The first 45 minutes will be dedicated to introductions, 5:30 minute video, and reading through 25 written questions and answers. The remaining 45 minutes will be open for additional questions and/or comments. Please feel free to type your questions and/or comments in the chat box. The Town Hall will be recorded and available for those unable to attend. Any comments in chat will also be recorded. Finally, this written Q and A sheet will be made available to the members and friends of PLC.]

#### ***1. What is the purpose of the 1<sup>st</sup> Quarter Report?***

The primary purpose of the 1<sup>st</sup> Quarter Report is to promote spiritual maturity through congregation-reflection and congregation-awareness. The time between settled pastors is

often referred to as a “pregnant moment”: a time when the congregational system is open to change. The 1<sup>st</sup> Quarter Report is meant to identify the varied opportunities for transformative and positive change that may help prepare PLC for a new future with a new pastor. The goal is to get the members of PLC into conversation, talking with each other in a way PLC member do not normally converse. The goal is NOT to teach me about how things *really* work at PLC, because I will leave with all that new learning and another congregation will thank me for it. The key is for PLC members to do the learning so that PLC benefits.

***2. Will the Transition Task Force-led self-study address any unresolved issues with our departed pastor(s)?***

Yes and No. The congregational self-study is not meant to get stuck on any of PLC’s departed pastors (i.e., not event- or person-focused). Instead, the goal is to discover opportunities for PLC to learn about their own behavior and congregational life. How PLC interacted in the past, and interacts now, with each departed pastor communicates something. PLC will want to explore what that “something” might be. These past ministry partnerships can be used to inform us of possible dangers to avoid, or blessings to seek. Always striving to discover new learning improves congregational life, not just for current members but for new members, too. Every conflict is an opportunity to put our faith into practice. Our lives as Christians, Luther says, are characterized by repentance and forgiveness. This process should promote Christ’s redeeming and healing power through God’s grace and the work of the Holy Spirit. The goal is to mature as a body of Christ so that both the congregation and the departed pastor will speak in ways that build up the other’s good name and reputation.

***3. Do Pastor Davis’s observations deserve serious consideration when he was the problem?***

Many congregations have adopted the practice of conducting exit interviews with church workers, and even with members who leave. These churches assume a learning posture and believe there is always room for improvement. During an exit interview, the congregation may reflect on the ministry together: what worked well and what did not work so well. This is an opportunity for both the congregation and the departing church worker to take a realistic look at themselves. In a healthy departure, there is a mutual sense of appreciation and thanksgiving for the contributions of the other. At the same time, there is a mutual ability to lovingly critique and encourage the other in possible areas for improvement. Rather than dismissing Pastor Davis’s feedback, PLC would do well to investigate whether there is anything to learn.

***4. How can the Report say that Pastor Davis was not a factor in PLC’s current state?***

Rather than saying Pastor Davis “was not a factor,” the 1<sup>st</sup> Quarter Report said Pastor Davis’s short-term ministry had “little influence on the congregation’s current state.” Pastor Davis was at PLC for only two-and-half years. The combined ministry and/or membership impact of Pastors RZ and Mees are 81 years. PLC members note that PLC’s downward membership trend predates Pastor Davis and Covid-19. PLC’s average weekly attendance decline over the past 10-years has outpaced the LCMS decline over the same period. (On a practical note, I would like to point to p. 42 of the Report, which says: “There is no reason for these dear [retired/departed] pastors to discontinue fellowship and worshiping at PLC. The key will be implementing healthy boundaries when it comes to providing pastoral care and leadership to the PLC flock, in both public preaching/teaching and private care ministry.” Anne and I had a lovely lunch visit with Pastor RZ and Carrie this past Saturday. We see the many similarities in our families and ministries and discussed the pertinent matters in the 1<sup>st</sup> Quarter Report amicably, foreseeing a great rapport going forward.)

#### ***5. Why spend 6 months conducting a congregational self-study?***

A benefit of the congregational self-study is the opportunity to engage all the members and recruit PLC’s best thinking. Everyone moves at a different pace. Giving the process 6 months allows all members and friends of PLC a chance to participate, digest, and take ownership of the process. If some unilaterally sprint ahead of the process, they may unintentionally shut off dialogue and communicate to others that their input is not of value. This type of bottle neck in communication causes what systems theorists refer to as a “closed system.”

#### ***6. What is the purpose of the Transition Task Force (TTF)?***

The TTF is the lead learning team for the congregational self-study. TTF members will become familiar with the key challenges facing Palisades Lutheran Church. They will learn several key “teaming” and “learning” concepts. The TTF members help facilitate the learning process by focusing on several “research questions” related to their group’s focus task (e.g., Church Governance and Leadership, Strategic Ministry Plan, Social and Environmental Justice, Unresolved Issues). The TTF will host the cottage meeting series in July, August, and September. They will gather data and translate their “findings” into a TTF Final Report and Recommendations to be delivered at the end of October 2021.

In recent decades there has been significant research on the use and effectiveness of teams. In the selection process of TTF members, I encourage “Thought Leaders” to be identified; that is, those people who are willing to reach intellectually beyond the organization’s norm. Dr. Karl Albrecht, author of “Organizational Intelligence and Knowledge Management: Thinking Outside the Silos,” says of thought leaders, “Their breadth of view, conceptual skills, and ability to see through the fog of argument and discern the few really key variables and priorities in situations

makes them unusually effective in whatever jobs they are assigned.”

My objective was to establish an “Ad-hocracy” by putting the TTF together. Sometimes a difficult or intractable organizational issue requires a special “hit squad” to solve it. Many organizations use ad-hocracies: specialized and transitory teams, task forces, committees, or advocacy groups assembled to attack an objective. Ad-hocracies tend to be most effective when they are few, small, well-focused, led by competent thought leaders, and politically powerful (p. 59, 1st Quarter Report).

- 7. *Recommendation #4 suggests PLC has six unresolved issues. I am not sure what you are talking about! Relationships and ministry have been working brilliantly. Our motto is: “One in Spirit.” We have no unresolved issues. Can’t we just move on to calling the next pastor and get on with life?***

I would not know about these six unresolved issues if members had not told me about them. Some members insist, “There is nothing to see here,” while other members say, “We have lots of problems, both operationally and spiritually.” If PLC leaders continue to shut down dialogue and not allow for different viewpoints, no learning will occur, and the congregation (organizational system) will remain effectively stuck. Many systems specialists refer to this organizational trait as homeostasis (efforts to keep everything relatively the same). Additionally, members who have been hurt by unresolved issues will continue to feel neglected and may find their needs met better elsewhere. I imagine that the enumerated issues are far more important than the 1<sup>st</sup> Quarter Report reflects since many past members who have left the church may have left due to one or more of these unresolved issues but are not present to make these concerns known. There will be some factual items people can/must agree on, but there are other items that are open to interpretation or derived from different experiences. It does not help to say other PLC members are wrong.

- 8. *When referring to “Leadership” does this mean pastoral or lay leadership?***

If the Report does not specify, it is referring to both pastoral and lay leadership.

- 9. *How is “Worship” a top 10 issue when it is at 0%?***

“In-person” worship was mentioned four times in the top 10 responses. These four votes were added to the category of Social and Environmental Justice, because whether to worship “in-person” appeared to be a political concern for the respondents (applying some editorial discretion). “Worship” was likewise mentioned repeatedly in relation to the other 9 of the top 10 issues. Therefore, worship has no stand-alone recognition, but deserves attention in the TTF self-study. Worship may be resolved as a derivative of the number 4 concern, “Strategic Ministry

Plan.” Under this concern, worship is identified as one of PLC’s core ministries.

***10. How can you Report there is a power struggle between the elders and council?***

Like the unresolved issues above, I would not be aware of any power struggles unless PLC members had directly reported them. One member stated, “There is a power struggle between the Council and Elders” (p. 11, comment 14). Whether you agree or not, this may be a subject of further study, but it did not make the list of the six unresolved issues.

***11. Since PLC supports the LCMS with 5% of its annual budget, doesn’t this mean there is unity between PLC and the LCMS?***

No. Unity with the LCMS or any faith community has less to do with financial support and more to do with unity in doctrine and practice. I am not suggesting there is no unity with the LCMS, I am just suggesting that the unity which exists is certainly not based on a financial arrangement.

***12. What does the Report mean when it says in various places there are “Too many pastors? Too many doctrines. Too many chiefs. Too many cooks. Too many teachers”?***

Starting with dual church-body membership, members of PLC report the overarching problem at PLC is fragmentation. With all the obstacles confronting the church today, PLC will want to avoid self-inflicted wounds. I am not saying PLC should abandon the current dual membership model. Instead, I am encouraging PLC to be sober-minded and acknowledge the real challenges that exist. Real sacrifices have been made, and will continue to be made, to maintain this duality.

The congregation should always ask the question, “What can we do to unify our church in doctrine and practice?” This question does not apply only locally, but also within the wider church bodies, since it is from there PLC will seek its trained church workers. For instance, right now there is disunity between the LCMC and LCMS treatment of clergy. There are two LCMC clergy onsite that are not being recognized by some members as pastors, and nor are they allowed to preach regularly for PLC. Likewise, PLC’s pastor is not able to preach regularly in the Revive LA (LCMC worship service) onsite. Yet, some members of PLC are worshipping regularly between both (like a revolving door) and receiving pastoral-spiritual care from both. Currently, both LCMC clergy hold formal leadership and voting positions in PLC while formally called PLC clergy are not afforded the same influence in the LCMC ministry. These complexities are neither right nor wrong, just makes doing ministry more challenging. PLC should not discount these difficulties.

As Intentional Interim Pastor, I am not affected, but your next settled pastor almost certainly will be. I am simply illustrating how there are built-in design flaws in the current ministry model. Where the PLC governing document says clergy from both LCMC and LCMS will be co-equals, that is not happening. A few might argue that Joe and Cyndi are not LCMC pastors and/or called by PLC, but for all practical purposes they are. PLC claims Revive LA is a daughter ministry. They worship onsite; they are involved in every critical governing meeting on matters of spiritual and physical oversight of PLC; they continuously engage in ministry dialogue with the PLC clergy; Revive LA banners are all over the property and PLC website, including email distributions, etc.

You may not have “formally” called them on paper, but you are informally “doing” ministry together. PLC members are very interested in all the goings-on in Revive LA and Revive LA leaders can’t help themselves but to be intimately involved in the goings-on of PLC, even being on PLC leadership boards. Most recently, some PLC members have become curious about Revive LA’s ability to call and designate pastors. Where do they get the authority? Can they designate anyone to be pastor? For a ministry that is not part of PLC, PLC seems to have an unusual interest in a ministry they are not vested in; likewise, Revive LA Pastors are quite vested in PLC ministry. “If it quacks like a duck, walks like a duck, has feathers and webbed feet, then it probably is a duck.” 😊

***13. Isn't it better for a church to offer a rich assortment of ministries services and options regardless of whether they can do them well?***

A rich assortment of individual ministry services and options should participate in the same unifying mission to be called part of the same church and not some other group participating in some other activity. An assortment of individual ministry services and options should be in alignment with the church’s vision, complementary to one another, and done with excellent execution. But you cannot eat an elephant in one bite to get there. Start small, do a few ministries really well, and grow incrementally according to the grace and finite resources God has entrusted.

***14. How can the Report say we are not unified when we keep telling Pastor Lee our motto is One in Spirit?***

The Report is reflecting the language of the members of PLC. Over and over again, members complained about fragmentation. Any potentially critical comment was prefaced by, “But these members are all well-intended” or “We have really competent and able people” and then proceeded to add “but” they are always making all the decisions, etc. PLC certainly strives for genuine unity, and there remains room for improving unity in faith/belief. The challenge for such

a pluralistic doctrinal and ministry context is what you will do when you bump into disagreement? All the surrounding churches have the advantage of being internally congruent in doctrine and practice.

***15. Why does the Report include a resource from the CTCR of the LCMS but nothing from the LCMC?***

The Report includes the Commission on Theology and Church Relations (CTCR) document, “Render Unto Caesar...Render Under God: A Lutheran View of Church and State” from the LCMS and a document titled, “How Does LCMC compare to the ELCA?” from the LCMC. The LCMS is a denomination with doctrinal position statements. The LCMC is an association of churches. The documents are qualitatively different because the church bodies are qualitatively different.

***16. What are we to do about the opposing doctrinal positions of the LCMC and the LCMS?***

Study it, research it, and pray about it. Without a doubt, these two entities are in fellowship together at PLC due to the relational benefits of doing church together. The pickle is when it comes to how to interpret Scripture or how to live out our Christian lives, many doctrinal viewpoints abound. **Please remember I am not suggesting what is right or wrong, or what PLC should do.** It would be good to appreciate, clarify and even reaffirm why is PLC choosing to remain in this state of duality.

***17. How should we respond to Pastor Lee’s suggesting we decide on what category size is the best fit?***

The first thing you will want to do is slow down; take no action. Instead, study the characteristics of the various size categories and discuss widely which ones best reflect PLC currently. Peter Senge identifies “the illusion of taking charge” as a common organizational learning disability. Instead, recruit the ownership and buy-in of the congregation. Over-functioning by a few is a recurring characteristic of PLC. Too many current PLC leaders chase the ball and front-run the process. Leaders should create space for TTF members to rally the resources and best thinking of the whole congregation to design a path forward.

***18. How are we to understand the profit-loss chart calculating “true costs”?***

In conducting a financial viability analysis, PLC will begin by determining the “true cost” of each core ministry. I met with Kevin Meyer and Romana Pichel to review the “hypothetical” profit-loss chart in the Report to determine “true cost.” They will be assisting in pulling together

a more accurate one. Kevin described he was familiar with the practice of determining "true cost ministry accounting." This accounting approach brings together the full cost of providing a ministry service or program offered on the church site. This ministry practice of accounting draws attention to the missing or hidden costs that are not available in traditional financial statements. PLC's finance committee should agree on, for internal use only, a formula for calculating shared expenses. This entails allocating income and expenses of each core ministry, including staff salaries and volunteer time. Based on usage (impact) PLC will include direct expenses, shared expenses, and a portion of administrative expenses for each separate ministry. Shared ministry expenses (common costs) do not relate to any one ministry but are shared among multiple ministries. For instance, your pastor, church secretary, musician, utilities, mortgage, etc..<sup>1</sup> (Page 26 of the Report) For example, if you pay the pastor \$100,000 and your church has five core ministries to which the pastor devotes one-fifth of his/her time, then each ministry would have a "shared expense" of \$20,000 for the cost of the pastor. This same formula would be applied to each church employee.

***19. Is the Report suggesting which core ministries to keep and which give away or close?***

No. The visual map highlights areas for improvement. We do not want to pre-empt the TTF self-study. The use of the term "ministries" is in a broad sense. Any activity that occurs on the PLC campus, using the Lord's resources, with significant impact is eligible for consideration as a core ministry depending on how much space, time, or energy it consumes. STAR Preschool is not formally a "ministry" of PLC, but it probably has the single greatest programmatic impact on site. Probably no other ministry has more foot traffic or drive thru traffic than STAR Preschool. No other ministry uses more space, five days a week. Therefore, it would be negligent to not include STAR Preschool in the Gospel Impact Stewardship Tool (GIST) analysis.

Discussions about mission impact are often difficult since every ministry is important to someone. While this may be true, each ministry has different levels of current and potential Gospel impact. Without wanting to criticize worthwhile programs, PLC will want to assign each ministry to one of four groupings: invest and grow, keep, and celebrate, keep watering, and close or give away. This mapping processing will help PLC decide how to steward resources for both strategic Gospel impact and financial viability.

***20. Did the Report state the LCMS and LCMC people are seriously divided, and this creates a power struggle?***

The Report does not state that members of the LCMS and LCMC are seriously divided at PLC but affirms statements made by individual members who made such assertions. Rather, it appears to me, there is incredible opportunity for ministry partnership, but this will require



collaborating in purpose and resources. The LCMC pastors serving Revive LA and the LCMC/LCMS pastor serving PLC would benefit from teaming together on staff. The same can be said of STAR Preschool leadership: one PLC campus ministry, one staff, and one purpose. Exploring how to integrate and leverage these ministries (given how small PLC, Revive LA and STAR Preschool are on their own) could experience exponential benefits through proper alignment of purpose and resources. Each of these ministries is in a different life cycle stage. Revive LA and STAR Preschool are closer to their reproductive years and PLC to “Old Age.” PLC offers incredible stability and resources and the other two offer energy and innovation (p. 46 of the Report).

***21. Are we going to run out of funds? How can we afford a full-time pastor?***

Part of the planning process will be to review the strategic ministry plan, not only the ministry plans in relation to each other (mission and cost), but also a complementary staffing configuration plan. It may be the ministry model and strategy require two new hires on staff and a part-time versus full-time pastor. But who knows at this point? I sure do not. But the congregation can only do what the funds the Lord provides permit.

***22. What if we cannot complete the IIM implementation process (Phase 3) in the next 8 months?***

I have served seven prior assignments as an Intentional Interim Pastor, lasting on average 18 months: Battle Creek, MI – 22 months; Kentwood, MI – 18 months; Glen Burnie, MD – 15 months; Westland, MI – 12 months; St. Johns, St. Johns – 17 months; Pittsburgh, PA – 12 months; and Lawrence, KS – 12 months. The IIM Agreement contracts for a 12-month commitment, with the possibility of extensions. Therefore, the process I take congregations through accounts for that 12-month commitment. Additionally, the IIM Agreement allows for extensions until two weeks prior to the arrival of the next called settled pastor. It reads:

*“The Parties may amend this Agreement, in writing, with 30-days’ notice. Extensions or new agreements beyond the initial term will be made on a six-month basis with provision for shorter periods and curtailment in the case that the Parties discover when the next settled Pastor will begin his ministry. In all cases, the Agreement and all extensions will cease to be in effect no later than 2 weeks prior to when the next resident Pastor is scheduled to be installed.”*

So, “yes,” if there is a need, I may be able to stay on beyond 12 months. It may be determined that the PLC ministry context after the IIM process slows down only requires 3/5 of a full-time pastoral position, freeing up funds for other ministry needs. Please bear in mind, though, that what PLC sets aside right now for pastoral care may set a precedent for future expectations and should be in line with whatever the congregation’s goals are for ministry

sustainability or growth.

### ***23. Is Pastor Lee vaccinated?***

Some corporate counsel have advised their members that inquiries of these kinds are not appropriate in the workplace. How much more so in the house of the Lord, which is supposed to be a beacon on a hill (Matt 5:14) for All people to come to its light (Isaiah 60:3)! The house of God should not be event-focused (on Covid) or person-focused (on the unvaccinated person), nor should it offer exclusive membership only to the healthy. The members and visitors of PLC should not feel their health records will EVER be a criterion for access to Word and Sacrament ministry or fellowship with Christians.

Additionally, conversations about Covid-19 and vaccination have become associated with social activism. Social activism (Social and Environmental Justice) is one of the 4 recommended areas of study for the TTF. I do not want to weigh in on this topic before the TTF has an opportunity to do the self-study and make a recommendation on how PLC may best proceed.

Indeed, these are matters of conscience. There is no law requiring vaccination by man (yet), let alone by God. So, where there is no law, the Christian church should not impose such a law. Some people's consciences will be burdened if you are vaccinated, and other people's consciences will be burdened if you are not. Participating in political or religious discourse can burden consciences instead of allowing the Holy Spirit to do its work in each person's heart: "For the church is ever conscious of the potential for polarization whenever social issues arise, and the church's goal is never to endanger the flock (through political polarization) but to nurture it carefully with lovingly persuasive speech. As with the first connection, the church relies primarily on the power of the Holy Spirit and the Gospel for motivation to deal with social issues (faith active in love)." As your Intentional Interim Pastor, my posture is to remain silent where Scripture (God) is silent and to speak where Scripture speaks.

Those members who feel uncomfortable not knowing my ongoing vaccination status should take whatever precautions they feel necessary according to their conscience as they prayerfully seek God's help to remain safe. They should also take heart in what CDC Director Dr. Rochelle Walensky said in her guidance for fully vaccinated persons, "Individuals who are vaccinated are safe." (Today Show, Friday, May 14, 2021; <https://www.youtube.com/watch?v=VLHTli16vDM> .)

### ***24. How successful has Pastor Lee been in prior IIM assignments?***

I have been 100% successful in facilitating the IIM process and tasks in the congregations I have been called to serve. How much learning occurs and what congregational leaders and members

do with that learning is up to you.

***25. What is next? What is needed from us?***

God works in many and various ways. The best thing we can all do is be open to other people's perspectives, the process, new learning, and new thinking – promote a healthy immune system. Jesus says, “Do not be anxious about anything, but in everything by prayer and supplication with thanksgiving let your requests be made known to God. And the peace of God, which surpasses all understanding, will guard your hearts and your minds in Christ Jesus” (Philippians 4:6 – 7).

## APPENDIX TWENTY-SEVEN

### IIM REPORT MONTH FIVE, JULY 14, 2021

Dear PLC Council & Members,

Summer greetings! This report marks the completion of five and a half months together in ministry. The Joining Phase (months 1 – 3) has been successfully completed and the Learning Phase (months 4 – 9) is in full swing. The Learning Phase, or congregational self-study, was kicked off by our Town Hall Meeting to discuss initial reactions to the 1<sup>st</sup> Quarter Report, followed by five weeks of training for the Transition Task Force members.

#### *Summary Points*

1. Church Secretary Recognition, Farewell, and Succession
2. Vacation Bible Camp
3. Leadership and Bible Study – Code of Conduct
4. Visitation Ministry & Official Acts
5. Cottage Meeting Series Schedule
6. IIM Extension
7. Community Engagement – Guest Speakers
8. Teaming with LCMC Pastors and Revive LA
9. Teaming with District
10. Proposal to Host a 5K

#### **Church Secretary Recognition, Farewell, and Succession**

On Sunday, July 4, Yolanda submitted her letter of resignation. She has accepted a piano teaching position that will allow her to teach master classes, chamber music, and advanced piano students. She will be teaching upwards of 40 – 50 students and describes this as an opportunity too exciting to turn down. Yolanda has agreed to stay on through August, which allows a new hire to shadow Yolanda for several weeks. I am happy for Yolanda on several levels. I would like to honor her with a special award I typically give departing staff if the budget allows. The cost will be under \$50. I would present the award to her during a Sunday morning worship service. Also, we may want to give Yolanda a special reception and congregational gift on the same day. Given past staff departures, this is an opportunity to practice celebratory farewells. Joe has offered to help in marketing for the church secretary position and in screening applicants. According to the responsibilities delegated by the Council, it is the pastor's duty to ultimately hire for this position within the hiring guidelines provided by the Council. I will need the hiring guidelines and I would like at least one other person to assist in the screening process. Additionally, when I typically hire a church secretary during an IIM, I use the title "interim"

which allows the incoming settled pastor to have the final say. Please let me know how to proceed. I know our timeline is short.

### **Vacation Bible Camp**

Please mark your calendars for Vacation Bible Camp next week: July 19 – 23 from 9am to 12noon. This year's theme is "God's Wonder Lab." You do not even have to be a volunteer to come. If you just want to worship and sing with the kids, you are welcome. If you just want to greet parents as they drop off kids, you are welcome. If you just want to help Klaus with games, you are welcome. The point is – "You are welcome! Everyone is welcome!!" We are so excited to be able to share God's love with the kids. That is what ministry is all about: passing on the faith from one generation to the next. And what a team of volunteers that have stepped up from PLC, First Lutheran in Venice, and Pilgrim in Santa Monica. It is encouraging to witness the members from these three congregations lean into pooling their resources for the benefit of all.

### **Leadership and Bible Study – Code of Conduct**

I have placed a Code of Conduct in each council member's mailbox at church. This is the Code of Conduct the nine TTF members have agreed to honor. Many ministry teams (e.g., councils, elders, school boards, staff, etc.) adopt a code of conduct, some call it a behavioral covenant. Covenant theology is Biblical. In fact, the Old Testament can be referred to as the "old covenant" and the New Testament the "new covenant." Note, the first promise of the team members is to worship, pray, and be in Bible study together. They say families that eat meals and pray together stay together. It is similar in churches. The meal, of course, is the Word of God. Please prayerfully consider joining our Sunday morning Bible study during the 6-month congregational self-study. Much of what we discuss in Sunday's class is complementary to the IIM process and to PLC's moving forward together. We learned this past week how important it is for leaders of congregations just to show up and be present. You do not have to say anything; your presence alone says it all.

### **Visitation Ministry and Official Acts**

Over the past month, I have been honored to participate in two memorial services at PLC: one for Mr. Peter Lee and the other for Mrs. Diane Schmidt. I made one home visit and have met privately five times with various members off site. I attended a pastor's conference in Denver, CO. I attended one circuit pastor's meeting via Zoom. I also met with Rev. Dominic Rivkin of the District and discussed the strategic ministry plan he had done with PLC nearing the end of Pastor Mees's ministry. On the 4<sup>th</sup> of July, Anne and I were honored to participate (along with Ben and Jerry) in the Palisades Parade representing PLC. (On a side note, Anne was recently

minted as a United States citizen. After seeing her decked out in the American colors and carrying an umbrella resembling the American flag, her Australian family was quite surprised with how patriotic she has come become. We owe it all to the Palisades Parade and Ben and Jerry!) We joined Julie and Mike Burditt, the Burkholder family, the Collins family, Cindy Stone, and another dear lady of the parish in the parade procession. While I am in contact with many other members of the parish through the TTF meetings, leadership meetings, VBC planning, Westside Ministry Network, Bible study and worship, volleyball, I am always available for a chat. If you, or anyone you know, would like a visit please email or call me or Yolanda to schedule a meeting. These get-togethers with one another are some of the best times in our spiritual walk.

### **Cottage Meeting Series Schedule**

The TTF leaders have requested the cottage meeting series begin in August and end in October, with a delivery date for their Report with Recommendations to be on Friday, January 7, 2022. This will allow two months for writing the Report with Recommendations, which will be necessary, since it is at a very busy time of the year – Thanksgiving, Advent, Christmas, and the New Year. The congregation will then have two weeks to read and digest the Report with Recommendations. Then I will host a town hall meeting to discuss the implications. Two weeks after the town hall, the congregation will want to hold a voter’s meeting to act on the TTF’s recommendations. Once the congregation votes on what actions will and will not be taken, we enter the final two phases of the IIM: Implementation and Departure.

### **Intentional Interim Ministry (IIM) Extension**

Once PLC voters vote on the recommendations, the Council can delegate what action items belong to the Council and what action items belong to the Staff. This begins the implementation process. The “IIM Implementation Phase” lasts 2 months and “IIM Departure Phase” lasts 1 month. This timeline already brings us past the January 31, 2022 IIM Agreement period. Since I began IIM ministry as a younger pastor, I have been a bit more flexible and have moved a little more quickly between assignments as needs emerged in the various districts I served. This means my average stay has been between 15-to-18 months. As soon as the IIM tasks were completed, I accepted a new ministry assignment. However, many IIM pastors stay longer than 18 months and it is the custom for IIM pastors to remain 30 days prior to the next settled pastor’s arrival.

Given the TTF’s request to extend out the congregational self-study, I would propose we discuss an IIM extension. Typically, I let district presidents know I am available for my next ministry assignment six months prior to the conclusion of my current assignment. That is about how long it takes for me to be reassigned. This time, however, we have expressed our desire to District President Mike Gibson for a settled call in the Pacific Southwest District on my PIF

(Pastoral Information Form) and SET (Self Evaluation Tool). This means we are able to stay as long as needed though we certainly do not wish to overstay or slow down PLC's calling process. We are quite able to transition to a new ministry when the time arrives. The length of my assignment at PLC will be entirely up to PLC and the progress the congregation feels it has made toward developmental goals.

## **Community Engagement – Guest Speakers**

Hopefully by the end of your congregational self-study time together PLC will be able to put into words their hopes, goals, dreams and wishes for ministry. That is called a vision. You know what a congregation values by what a congregation does. Interestingly, we may have beautiful faith statements, but at the end of the day, what a congregation does is what they believe.

Over the month of August, maybe part of September, I am asking four speakers from the community to share with our congregation what it is they do and are so passionate about and how PLC might get involved and become a valuable partner. The idea of course is to stir up conversation. I am not promoting any of the speakers or organizations. Instead, I simply want PLC to hear from the community, from outsiders, and have the opportunity to listen to the Holy Spirit. It may be God will stir up in our bellies a fire for one of these endeavors. It may be one of these causes is aligned with PLC's core values. Who knows. But we will look forward to finding out!

Rev. Dr. Reggie McNeal's key-note address, *Interim Leadership Challenges and Opportunities in Today's Changing Church Culture*, challenged assumptions about church and offered practical suggestions. Young people today are all about changing the world but are not doing it from inside the church. To build intergenerational relationships, church-centric people need to become kingdom-centric people, showing an alternative way to live. Kingdom-centric people of God are about changing the world, changing the narrative, and changing the focus from programs to people. "We create an environment where people become people," he said. "Most aren't going to get it by talking them into it. They have to experience it."

McNeal said, "Many congregations would rather die than change." For these congregations in the denial stage, he encourages selling the problem. Other congregations bounce between fear and denial.

"We ask parishioners to come into church and take a seat and watch," says McNeal. "We tend to develop community in a circle; but that is not how it works." Traditionally, mainline churches have worked in the direction of "head, heart, hands." McNeal advocates changing the model to "hand, heart, head"—working shoulder to shoulder until people catch "it." Not too many young people are ready to get into a circle and bear it all. We need to do something a little more imaginative. Afterwards, the teaching can occur, shifting "from delivery to debriefing."

McNeal advocates becoming Kingdom-focused instead of church-focused. He reminds us that Luke 17:21 teaches, "the Kingdom of God is within you." McNeal's Kingdom of God Series, "People of God Partnering with God in His Redemptive Mission in the World," addresses the following items:

- "People of God" – Who are we? Why do we exist?
- "Partnering with God." – Why are we here? How much Kingdom do people get?
- "Redemptive Mission" – What is our role in the world? The "why" is grounding.

- “In the World” – Do we catch and release or catch and hold?

Changing the narrative to reach younger generations involves three stool legs:

- Shift our language: What do we talk about? How do we talk about it? All of the discussions for hundreds of years have been about making the church right rather than about bringing the Kingdom of God to the people. “We’ll take any topic and bring it inside the church,” Reggie says.
- Change the scorecard: Local churches should change their measurements for success away from church statistics and towards how the church is partnering with the local community. This doesn’t mean we leave Jesus out of the equation – ultimately our community is going to want to know why we do what we do.
- Shift the leadership agenda: In order for these shifts to happen, the leader has to change their own personal scorecard. Whatever that looks like, initiate reaching out and incorporate that service into our personal life, even if we start small, and see what sort of partnerships can develop over time.

### **Teaming with the LCMC Pastors and Revive LA**

During the month of June, I asked our daughter congregation’s pastors, Joe and Cyndi, to intentionally be part of PLC worship and to allow me to be a part of Revive LA worship. To my delight, they eagerly agreed. In June, we shared roles in each other services in the Scripture readings and prayer. In July, we are sharing preaching assignments, with me preaching on the 1<sup>st</sup> and 3<sup>rd</sup> Sunday, Joe on the 2<sup>nd</sup> Sunday, and Cyndi on the 4<sup>th</sup> Sunday. Next, in the month of August, we hope to team up and share in our singing and praising of the Lord. We are not sure what that might look like but keep our leadership teams in your prayers. The idea is to give both congregations an opportunity to appreciate each other and each other’s worship and to envision what is possible in the future. It may or may not make sense to worship apart.

There may be wisdom in coming together, i.e., one in spirit and voice. Two questions are glaring: What are we doing at PLC to avoid generational silos, a common challenge of shrinking churches? How does PLC promote intergenerational relationships? In Acts we’re told the New Testament church had everything in common. They were able to pray, sing, and commune together. Is such unity still possible today? If so, what might that look like? How do we get from here to there? Maybe we don’t want to. Maybe that is okay. PLC and Revive LA deserve an opportunity to exhaust the possibilities for sustainable ministry and consider how best to collaborate and be there for each other so that you can be there collectively for the community God has called you to serve.

### **Teaming with the Pacific Southwest District (PSD)**

Part of the process I take leadership through is facilitating conversation with district leaders. I will be asking a few people of PLC to join in conversation with District President Gibson and his staff. These conversations will coincide with the congregational self-study. I will ask two council



members, one elder, one TTF, and possible two members at large. Stay tuned.

### **Proposal to Host a 5K Run/Walk and Kid's Fun Run**

Health and fitness are a big part of the Southern California dream. With beautiful weather, people come seeking happier lives through healthier and more responsible living. While there are thousands of active runners, walkers, and cyclists, there are few opportunities for avid individuals and families of all ages to participate in running and walking events. There are running stores and clubs, but few races. If you want regular events, you've got to go to the OC.

In speaking with Rich Wilken, there may be an opportunity to host a 5k for the Palisades at PLC. I have been a race director at three other congregations and am quite familiar with the process. Rich explained he can look into the race permit and together we chart out a course. The idea would be to have the race start and stop at PLC. This gets people on campus. The pastor, of course, will want to open the race with a quick welcome and prayer, runners are familiar with this sort of welcome. This is a great way to tap into another sector of the community.

A 5K race can be beneficial on multiple levels as it can provide a 5k fundraising event that encourages other charities to promote the race among their members and donors. The funds raised can be split among the charities, with the host congregation receiving a significantly larger percentage of the split. The idea is to encourage other churches, schools, and nonprofits to participate in PLC's fundraiser. This "sharing" feature can help make our event even more of a success, fulfill the vision of "engaging the community" outside our walls, and help raise needed funds. Rich and I are requesting the Council's approval to pursue the permit and if it is secured go forward with planning the event.

What a tremendous joy it is to study God's Word, worship, sing, pray, and fellowship together with you all.

Blessings in Christ,  
Rev. Martin E. Lee, IIP

## APPENDIX TWENTY-EIGHT

### COTTAGE MEETINGS

August 21, 2021

#### “REMEMBERING AND CELEBRATING PLC HISTORY”

*“If you can’t describe what you are doing as a process you don’t know what you’re doing?” (W. Edwards Deming)*

*“All organizations are perfectly designed to get the results they are now getting. If we want different results, we must change the way we do things.” (Tom Northrup)*

#### I. FRAMING THE LEARNING CONCEPT (10 minutes)

##### **What is a learning CHURCH?**

Chris Argyris and Donald A. Schon (1996) *Organizations as Collectives* Argyris and Schon tackle the basic question: “What is an organization that it may be able to learn?” They answer this question by treating an organization as a personal, rather than impersonal, entity.

But the personal organization, the CHURCH, is made up of individuals. Just because individuals might learn something does not mean the organization, the CHURCH, has learned something: “In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do.” In contrast, as in the case of the military and the phone company, “there are situations in which an organization seems to know far more than its individual members” due to “structures, procedures, and memories built into the fabric of organizations...”. Argyris and Schon assert that “when something that looks like organizational learning occurs, it seems, not infrequently, to have little to do with the person at the top.” Instead, “we might think of clusters of individual members as the agents who learn ‘for’ the larger organization to which they belong.” Cottage meetings would constitute such “clusters of individual members...who learn ‘for’ the larger organization [CHURCH] to which they belong.”

##### **What happens when a CHURCH fails to learn?**

Failure of an organization to learn is related to the degree views differ among individual members of the organization, or CHURCH. Argyris and Schon warn that as long as “stories remained scattered and uninterpreted, the map of the development process remained vague, and the diagnoses of the development problem remained ambiguous.” Argyris and Schon describe that, in organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interaction.” Bringing individual members together for today’s cottage meeting is meant to promote congregational learning and the timeline activity is meant to mesh individual experiences into the “context of their [PLC’s] collective interaction.”

1

Prepared by: TTF Team #1 – Maria Dwyer, Julie Hendricks, and Donna ~~Shaw~~  
Prepared for: Palisades Lutheran Church, Pacific Palisades, CA

## “REMEMBERING AND CELEBRATING PLC HISTORY”

TTF Team #1 – Maria Dwyer, Julie Hendricks, and Donna ~~Shoupe~~  
Palisades Lutheran Church, Pacific Palisades, CA

### II. INTRODUCTION (3 minutes)

History is important. The life of PLC is influenced daily by our history. Our church history is part of “His-story”. The timeline activity is a living document. More will be added. It gives a snapshot. It reveals patterns. The dots literally put you the participants on the timeline – which makes it a living document. This timeline can be equated to a family genogram. You may be able to get a sense for when the family was cutoff, distanced, enmeshed, or a bit rebellious. On the hand, you may observe when the family was passionate about a ministry or major event, joyful times, or real time of growth.

We will leave this timeline up. When our new settled pastor and family arrive, they will have a chance to see it and learn about their new church family. It will also be a scrap book for us and any new members who join us.

### III. GOALS (1 minutes)

1. Group participation
2. Collaboration
3. Collegiality
4. Inspire new visions
5. Affirm values
6. See God’s providential hand at work

### IV. OBJECTIVES (2 minutes)

1. Identify those stories and values of the past to **CELEBRATE** and carry forward.
2. Remember those stories and grievances of the past to forgive, learn from, and **LEAVE BEHIND at the CROSS**.

### V. GROUND RULES (2 minutes)

1. Disagree yes, disrespect no!
2. Speak the TRUTH in LOVE.
3. Come up with a few of your own...

### VI. STICKERS (10 minutes)

August 21, 2021

### **Two Types of Learning: Adaptive and Generative.**

One of the important principles of Peter Senge's (American systems scientist, senior lecturer at MIT Sloan School of Management) work is the differentiation between adaptive and generative learning.

#### ***Adaptive Learning***

He characterizes adaptive learning as focusing on the foundation of existing knowledge, and amending that with new thinking, to accomplish an objective. This kind of learning is particularly salient to organizations seeking continuous improvement. For example, understanding the gaps in existing ministry teams communicating or focusing on common goals. Senge's adaptive learning "enables the generation of additional ideas by which to close those gaps."

#### ***Generative Learning***

By contrast, when new congregational vision, ministries, or ministry teams are urgently needed Senge approach recommends "a different kind of learning is required to produce radical new ideas and discontinuous change – which is the nature of generative learning (Harrison, 2000). This was validated soon afterward by scholar James March (1991), who expanded on this theory to identify two modes of organizational learning: 1) **exploitation**, or the use of existing knowledge and resources to gain value from what is already known; and 2) **exploration** or thinking in previously unused or unforeseen ways (i.e., seeking new options, experimenting, and conducting research) (p. 72)." However, too much exploration of new knowledge (generative learning) leaves the organization wishing for returns on its investments, while too much exploitation of existing knowledge (incremental learning) may result in it becoming outdated and useless.

The challenge with the **TIMELINE ACTIVITY** will be to create the appropriate balance – even though it may be a moving target – between the need to develop new knowledge versus leverage existing knowledge!

In a Peanuts cartoon Lucy demanded that Linus change TV channels, threatening him with her fist if he didn't. "What makes you think you can walk right in here and take over?" asks Linus.



What a sight to behold when the Church is a faithful partner in God's Mission to seek and save the lost!

2

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Prepared for: Palisades Lutheran Church, Pacific Palisades, CA

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### V. GROUND RULES (2 minutes)

1. Disagree yes, disrespect no!
2. Speak the TRUTH in LOVE.
3. Come up with a few of your own...

### VI. STICKERS (10 minutes)

August 21, 2021

1. **GREEN Circle** – Place ONE green circle for when you joined PLC. Write your name on your circle.
2. **RED Circle** – Remember the color RED symbolizes the very precious blood of Christ that covers over a multitude of sin. Please place TWO red circles on the timeline, one for the most impactful event in the life of PLC that you wish to leave behind and one for the most Seminal moment in the life of PLC you wish to celebrate and carry forward. How are those moments still have an impact on the church? Write the event on the circle.
3. **GOLD Circle** – Revelations 2:10 says, “Be faithful unto death and I will give you a crown of life.” May we never forget that the church on earth is meant to save souls. Gold represents the crown of life. Place ONE gold circle for when you are projected to receive your victory crown. Place another crown on the timeline when you lost a significant other. Write the name on the circle.

**VII. TABLE TALKS** (15 minutes) (Focusing on the “RED” stickers...)

1. Who was on staff at the time?
2. What was going on in America?
3. What was going on in the world?
4. What was going on in your life?
5. When did you have your largest growth?
6. When did you have your largest exodus?

**VIII. GROUP DISCUSSION** (15 minutes)

1. What was PLC’s vision at the time of the merger in 1970?
2. What was the Vision of each of the 10-year segments since 1970?
3. Who were the first leaders and why did they decide there was a need to merge the two churches?
4. What were the specific needs the congregations were trying to meet at that time?
5. What were the major statements of belief?
6. What was the progression over the years and the factors that influenced them?
7. Where does PLC stand now compared to its history?

4

Prepared by: TTF Team #1 – Maria Dwyer, Julie Hendricks, and Donna ~~SAVVO~~  
Prepared for: Palisades Lutheran Church, Pacific Palisades, CA

## APPENDIX TWENTY-NINE

### PLC INITIATING THE IIM PROCESS, AUGUST 11, 2020

Dear Pastor Schroeder Lee:

I am Richard Olsen, Chair of the Interim Pastor Selection Committee at Palisades Lutheran Church in Pacific Palisades, CA (Los Angeles) and we have received your name and information form and SET from our LCMS Pacific Southwest District President Dr Mike Gibson, and Pastor Richard Paul, District head of Interim Ministry. We have also received support for your possible candidacy for our position from our pastoral advisor, Pastor Longest Term (LCMS retired, and former director of Pacific Southwest District of LCMS IIM Program, to whom you spoke on the phone, and Pastor Peter Alexander, Credentialed IIM specialist and trainer.

We are looking for an Intentional Interim Minister to help us in our current vacancy. We are fortunate to have Pastor Most Recent Vacancy (LCMS, retired) as transition pastor; for the calendar year of 2020, maximum time, and are now prepared to begin an IIM pastor as early as October 2020 and hope to start no later than January 2020, but we are a little flexible.

We have a unique congregation in that for 50 years we have been a dual affiliation congregation between ALC and LCMS (1970), but ALC changed to ELCA and the national LCMS broke fellowship with ELCA. We continued with two pastors until Pastor Longest Term retired from being the LCMS pastor. For financial reasons we could only afford one pastor and kept our other pastor WH Mees, Jr., who was ALC and then subsequently ELCA, and then LCMC. We would like to maintain the dual affiliation and our motto is "One in the Spirit". In 2016 Pastor Mees retired and we called Pastor Kenneth Davis, LCMC who served from January 2017-June 2019, when he resigned from PLC and the ministry. The congregation agreed to follow the IIM procedure and solicit recommendations from both LCMS (Dr. Gibson) and LCMC (Pastor Perry Fruhling).

I would like very much to talk to you on the phone and see if you are interested in the possibility of our IIM position and if so, what is your current position, and when could you start, and what would you need in the way of housing. Also, I would like to ask you to provide some references to former churches you have served, especially IIM positions, in preparation for a Zoom interview with our selection committee. I would also send you more information about ourselves (our BIO, and the list of outcomes and timetable we expect from the IIM procedure, that we have prepared for Dr Gibson).

I have two different cell phone numbers for you so perhaps you could tell me your current number. I have 517-775-XXXX (your CV provided to Pastor Longest Term a few weeks ago) and 517-755-XXXX (Pastor's information Form provided to Pastor Richard Paul at our PSD District of LCMS). My cell phone is 310-266-XXXX.

Yours in Christ,

Richard W. Olsen, PhD, Chair of Interim Pastor Selection Committee, and Head Elder, Palisades Lutheran Church

## APPENDIX THIRTY

### PLC OUTLINING IIM OBJECTIVES, AUGUST 28, 2020

Dear Pastor Martin:

Thank you very much for this reaction communication (within a few hours) to our interview last evening. This is quite in line with our desired outcomes. Your ideas and discussion last night were already very valuable to us and show an experience and skill in the IIM process of a very high level, as well as helpful hints to us on going forward.

I would like to add to Outcome #2 in your list, "Develop worship services that attract newcomers" ESPECIALLY THOSE WITH CHILDREN.

Looking forward to continued communication,  
yours in Christ,  
Richard

**From:** [martin@churchorganizers.org](mailto:martin@churchorganizers.org) [mailto:[martin@churchorganizers.org](mailto:martin@churchorganizers.org)]

**Sent:** Friday, August 28, 2020 1:41 PM

**To:** 'RICHARD OLSEN'

**Cc:** call@plc.cc

**Subject:** Intentional Interim Ministry at Palisades Lutheran

Dear Selection Committee Members,

Thank you for the opportunity to get to know you and to discuss how Intentional Interim Ministry may be valuable for Palisades Lutheran congregation. In Romans 14:13, Paul encourages the church, "make up your mind not to put any stumbling block or obstacle in your brother's way." Your desire to learn from the past and commit to new directions shows you have made up your minds to avoid such obstacles.

During the IIM period, the goal will be to address your most impactful desired outcomes:

1. Enable PLC members to work together as a loving family.
  - Assist us so that both conservatives and liberals can come together, move forward and work together.
  - Develop worship services and music in both contemporary and traditional formats.
  - Assist members to be more supportive of each other despite different viewpoints.
  - Help us accommodate the different outlooks of our two denominations/church bodies so that there is unity on how to handle church practices and interactions with the community.

The IIM process will promote a safe environment for holding difficult conversations and healing past hurts. The joining phase will encourage members to name and prioritize what is most important to them. Members will decide what they want to forgive and leave in the past, and what they want to celebrate and carry forward in mission.



2. Help us in developing a successful strategy for mission and outreach.
  - Help us to determine how best to serve our community.
  - Help us to enact ministry projects on social issues such as ministry to the homeless and to minorities.
  - Develop worship services that attract newcomers.

The IIM process will assist the congregation define their mission and outreach strategy (where are we going?) and align ministry resources toward that mission and outreach strategy (how are we going to get there?). Rev. Dr. Peter Steinke (psychologist and church consultant) says that every church should have a letter of reference from the poor.

3. Qualities desired in an Intentional Interim Pastor
  - Relates well with all people in the congregation.
  - Works well with members of all political persuasions.
  - Works well with young families and develops programs and activities for children/youth.
  - Gives good sermons based on the Bible.

One of the most important tasks I have as an IIM Pastor is to "behave myself." I do not throw my weight to either side of the political aisle, since members who love the Lord are on both sides of the aisle and can hold varying viewpoints. I do everything I can with the strength and ability God has given me to love the Lord's sheep (young, old, rich, poor, black, white, male, female, etc.) and feed them from the inspired, inerrant Word of God.

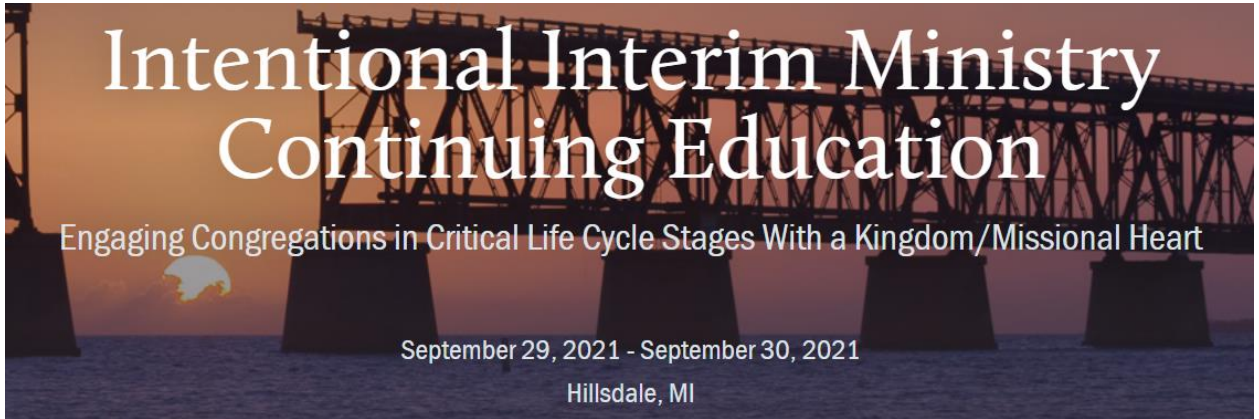
4. Encouraging spiritual growth within the congregation
  - Worship
  - Small groups
  - Bible study
  - Fellowship opportunities
  - Prayer groups

*The* most important task I have as an IIM Pastor is the most important task for pastors generally: to help members grow in their love and knowledge of the Lord. Sunday morning Bible study is my favorite time of the week as we gather around the Word to grow spiritually and relationally. You will find many new groups and frequent spiritual growth opportunities emerge during the IIM process!

Please let me know how I may be of further helping in your planning for mission and ministry.

## APPENDIX THIRTY-ONE

### HOW DO WE TALK ABOUT CLOSURE?



Serving in a variety of leadership capacities as an Intentional Interim Pastor has enough challenges as it is! However, in recent years two critical phenomena have simultaneously made congregational ministry even more challenging in this post-Christian era: the decline of the Church's central place in community and the resultant aging and shrinking of congregations (with some notable exceptions) along with the resulting financial challenges to "keep the doors open," and the continued decline in the number of pastors available to serve in congregations. How might God want to use this time of often painful transition to renew and even expand His Kingdom? Intentional Interim Pastors are at the forefront of the conversation as they serve congregations in transition at critical junctures in their life cycle.<sup>1</sup>

How do we have "Kingdom conversations" that go beyond "survival"?

How do we talk about closure?

When is "revitalization" NOT an option?

What is a "Legacy congregation"?

What are the pros and cons of a dual parish?

What is a "cathedral model"?

How do we talk about mergers?

What part does "Kingdom geography" play in the discussion?

Going forward, we will need several Interim pastors who have the courage and gifts to intentionally engage in these challenging conversations. A compassionate pastor's heart and some special skills will be required. Sign up now!

Michindoh Conference Center

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<sup>1</sup> Copied from Michigan District of the LCMS, <https://michigandistrict.org/event/intentional-interim-ministry-continuing-education-fall21/>.

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