



Consulting Engagement with Sardis Baptist Church Charlotte, North Carolina

Working Proposal

Narrative Background

After initial conversations with pastor Bob Stillerman and approval by the church, Pinnacle began a consulting engagement with Sardis Baptist in February 2023. A Discovery and Design Team, made up of lay leaders and staff, was formed. Through the course of five sessions with this team, we formulated the following “How Might We” question:

How might we clarify our identity and purpose, align our structures and systems, tell our story more effectively, and cultivate authentic mutual relationships, so that all might experience the warmth and welcome of God?

This question will guide a larger congregational engagement, which will take place over the next year or so. The congregation-wide process will provide opportunities for large group sessions, third-party expertise, task-oriented working groups, and specific deliverables. Our hope is that, as we emerge from the COVID disruption, the congregation might reflect, retool, and reimagine its role in God’s work in the world.

Sardis Consulting Engagement: Scope and Sequence

Phase One: Background (Spring/Summer, 2023)

- Discovery and Design Team (Completed)
- Community Demographic Study

Phase Two: Congregational Feedback (Early Fall, 2023)

- Kick-off Event - Vision 360 Weekend
- Congregational Listening Sessions

Phase Three: Generating Insights and Strategies (Late Fall, 2023)

- Task-Specific Working Groups
- Congregational Communication Plan
- Documents Audit

Phase Four: Long-Term Thinking (Winter/Spring, 2024)

- Conversation: Keeping “Baptist” in the Name
- Asset Mapping / Gifts Inventory / Enneagram

Ongoing Components

- Staff Development
- Staff and Congregational Coaching

End Stage (Late Spring, 2024)

- Updated Ministry Plan
- Updated Ministry Assets: Organizing Documents and Communications Tools
- Visioning Document (Comprehensive Summary of Project Work)

Sardis Consulting Engagement: Detailed Description

Community Demographics Study (Summer 2023)

ESRI Demographics, or another third-party service, would prepare a detailed demographic analysis at the neighborhood and city level, called a Ministry Area Profile. Many new church starts or churches in transition use this data to shape their approach to reaching out to their neighbors. Such a report will offer significant insight for how Sardis might engage the surrounding community, both as we move through this consulting process and beyond.

Vision 360 Weekend (Early Fall 2023)

A retreat-style gathering, one-day or multi-day, probably offsite, where the entire congregation will spend time looking back, looking around, and looking ahead. A primary goal of this weekend will be for participants to celebrate, clarify, and commit to the ongoing/unfolding identity and mission of Sardis. This first, congregation-wide engagement will set the stage for the rest of the unfolding process.

- Looking Back - how has God led us up to this moment?
- Looking Around - where are we now and what is the current context for American religious life?
- Looking Ahead - where do we sense God leading us as a congregation?

Small Group Listening Sessions (Early Fall 2023)

Listening sessions invite every participant in the life of the church (and potentially interested outsiders) to gather in groups of 8-12 for guided feedback sessions. The primary goal of listening sessions is to uncover common themes, joys, and concerns related to the ongoing life of the congregation. These sessions will build off of the Vision 360 weekend and provide guidance for other parts of the process.

Task-Specific Working Groups (September - Early December 2023)

Working groups made up of Sardis folks will give particular, focused attention to three of the phrases from the “How Might We” question: aligning our systems and structures, telling our story more effectively, and cultivating authentic mutual relationships. These working groups will be facilitated by church staff

and coached by David Brown throughout their work. Specific tasks for each working group are suggested below, but the list may not be exhaustive.

1. Align Our Systems and Structures

- Updated Governing Documents (Bylaws and other documents)
- Evaluation of steward team (committee) structure and church organization
- Budget aligned with purpose / mission
- How to use staff time / gifts / resources most effectively

2. Tell Our Story More Effectively

- Intentional, coordinated plan for internal and external communication
- Team of people organized around telling the Sardis story
- Phrases / One-liners that describe unique aspects of Sardis
- Engage a third-party specialist for help in designing a communication plan, including specific investment/resources needed in order to effectively reach external audiences

3. Cultivate authentic mutual relationships

- Design and execute holy experiments around building mutual relationships
- Explore ways to deepen internal relationships within Sardis (bonding) and expand external relationships in the larger community (bridging)
- Evaluate / foster mutual partnerships with community organizations
- Create a campus use plan to encourage intentional stewardship of the building and property and hospitality to neighbors

Congregational Communication Plan (October/November 2023)

A formalized communication plan may provide significant traction toward the “telling our story more effectively” goal. The working group might engage with a third-party company like Digital Congregations to develop such a plan. The communication plan should include specific strategies to tell the Sardis story both internally and externally, with specific guidance on the investment / resources needed to effectively reach external audiences through recommended channels.

Documents Audit: Review, Clarify, Update (Fall 2023 - Winter 2024)

The working group for “aligning our structures and systems” would conduct a full review of all foundational Sardis documents, editing and updated as needed.

- Mission statement, Seven Promises, etc
- Constitution, Bylaws, Committee manual
- Organizational structures, staffing model, etc

The group would bring to the larger congregation any changes that require formal action. This will be an in-depth process that will likely take several months to complete.

Conversation: Keeping “Baptist” in the Name? (possibly January 2024)

At several points in the discovery and design stage, the question has arisen of whether or not to keep the name “Baptist” and why or why not - how does this name help us to or hinder us from living into our identity and mission. This element of the consulting engagement would bring together several sessions focused on historical Baptist identity, current considerations, and strategic thinking around how our name reflects the reality of who we are and what God has called us to do.

Asset Mapping / Gifts Inventory / Enneagram Training (Spring 2024)

As we work through the various aspects of the process - mission clarity, structural alignment, communication, etc - we want to invite all those who are connected to Sardis to join in the work from a position of their own strengths, gifts, and passions. One way to identify gifts and engage people in tasks that might bring them joy and benefit the larger congregation would be using an inventory or assessment with interpretation and coaching around it. Any of these three examples could be a great option - and we have people within Pinnacle who can facilitate each one. Question: better to use at the beginning of the process (along with the listening sessions) or later in the process?

Staff Development Opportunities (Ongoing throughout the engagement)

- A half-day staff retreat early in the process
- Six formal staff development sessions
- Additional informal check-ins and staff coaching as needed

Ongoing Congregational Coaching (June 2023 - May 2024)

Throughout the process, David Brown will be available as a coach for the ministers and staff, the Deacons or other church leadership team, and the task-focused working groups

Finalizing Documents and Deliverables (May 2024)

Throughout the course of the consulting engagement, various documents and deliverables will be produced, both in-house and from third-party sources. These include: demographic study, listening session report, communication plan, updated church documents, asset map / gifts report, etc. Many of these will be available and utilized earlier in the process. As the consulting engagement draws to an end, these documents and deliverables will be collected and organized into the following: Updated Ministry Plan, Updated Ministry Assets, and Visioning Process Summary.

Sardis Consulting Engagement: Estimated Costs

Community Demographics Study

Third-party Deliverable \$500

Vision 360 Weekend

Two-day event fee \$1800, plus travel

Small Group Listening Sessions

One-day event fee \$900, plus travel

Task-Specific Working Groups (included in coaching fee)

Congregational Communication Plan

Third-party Deliverable \$1000

Documents Audit: Review, Clarify, Update (included in coaching fee)

Conversation: Keeping "Baptist" in the Name?

Four 1-2 hour congregational sessions \$800, plus travel

Asset Mapping / Gifts Inventory / Enneagram Training

One-day event fee \$900, plus travel

Staff Development Opportunities (Ongoing throughout the engagement)

- A half-day staff retreat early in the process \$450, plus travel
- Six formal staff development sessions \$1200, plus travel
- Additional informal check-ins / coaching (included in coaching fee)

Ongoing Congregational Coaching

Annual unlimited coaching fee \$2400

Finalizing Documents and Deliverables (included in coaching fees)

Estimated Travel Cost for David Brown

15 round trips from Rock Hill to Sardis \$600

Total Estimated Costs \$10,550

Notes on Estimated Costs:

- These costs represent costs that would flow through Pinnacle Leadership Associates
- Unlimited coaching by phone or Zoom for staff, lay leaders, and working groups is included
- Offsite locations and their associated rental fees are not included
- Food / drink costs for events are not included
- If additional outside leaders are used for the Asset Map / Enneagram or the Baptist Name sessions, additional leader / travel costs might be incurred