



# Cultivate Mission

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## Framework for Choosing a Church Consultant/Consulting Agency

So your church is considering consultation? This means you recognize areas for growth or problems to solve or issues to be dealt with. Choosing the right consultant for the situation can make a world of difference – both in what you learn and in how well your congregation is ready and willing to work through the suggestions/process of the consultant. There are different kinds of consultants for different situations.

The following is intended to help your church ask good questions and consider possible frameworks in discerning this important decision. All the questions and frameworks provided here might not be useful to you...that's OK! Some might find an "aha" moment in one question or one section from what follows. That's OK too! The Methodology section increases in complexity, thus some may find the direction needed in section IIA.

The Questions Fall Under Two Areas:

- I. Theology (What do people think about God and the church?)
- II. Methodology (How do people go about leading/guiding change?)

### **I. What is the theology of this consultant/agency? And will it be a fit for our church?**

For theology, what do you think this consultant believes about God? Especially under theology, what is their *ecclesiology*, i.e. their view of the church, its purpose, etc.? The clue for looking at theology and ecclesiology would be to examine mission/purpose statements of the agency, philosophical statements, etc.

Many will just get a general feel of fit through what is written and said, but try to dig underneath the surface to the deeper theology/philosophy. The consultant/agency doesn't need to be a perfect fit, but this may help decide between A and B, for instance.

Methodology and theology inform one another. Often what is talked about in person or in websites/brochure is more the methodology. So a church can dig around these statements as well to determine theological fit.

## II. What is the methodology and does it fit our situation?

The goal of consulting is the implementation of positive change. Another way to think of the goal is for the congregation to become more able to generate their own learning and problem solving into the future. The success of an implementation strategy will depend on the quality of the conversation that begins it.<sup>1</sup> In other words, keep the end in mind. And what type of conversation do you think you need to get there?

In framing thoughts regarding methodology, here are three useful paradigms:

- A. Approach to Discovery (Assessment) and Doing (Implementation)
- B. Dynamics of Consultant/Church Relationship
- C. Color

### A. APPROACH TO DISCOVERY (assessment) AND DOING (implementation):

Block has been a consulting practitioner in the business world for 30 years, and has written the book that many consider a classic work, *Flawless Consulting*.<sup>2</sup> He identifies two effective approaches:

#### 1. Third Party

The consultant studies the situation and makes recommendations for improvement/change. The consultant has special expertise and is an outsider to the system, thus has the knowledge, objectivity, and the freedom to make recommendations.

- The **strength** of the 3<sup>rd</sup> party approach is maximizing the consultant's expertise and objectivity. Consultant has more control over end recommendations. It might take less time.
- The **weakness** is separating the discovery (assessment) and the doing (implementation). Thus the recommendations might not be owned by the larger congregation, and more time is needed on the back end in gaining ownership of the recommended action.

#### 2. Whole System

The people affected by the change join the consultant in the process of discovery, recommendation, decision and implementation. Thus, discovery and doing are united. The process is more likely customized to the unique situation of the congregation.

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<sup>1</sup> Peter Block, *Flawless Consulting* (San Francisco: Jossey-Bass Pfeiffer, 1981).

<sup>2</sup> Block, *Flawless Consulting*.

- The **strength** of whole system consulting is high engagement and involvement on the part of the entire organization. It's a bet on the collective knowledge, purpose and commitment that comes out of greater participation.
- The **weakness** of whole system consulting is that the consultant and the client (the one who hired the consultant, such as the pastor or board) have less control over the outcomes of discovery, recommendation and doing. Also, it might take more time.

Questions to ask:

1. Is there potential for resistance within our church? (If yes, whole system might be better, because it provides more opportunity for congregational participation.)
2. Is the church amenable to outside experts, and ready to implement recommendations provided without the more participatory work of whole system consultation? (If yes, 3<sup>rd</sup> party might be better.)

## **B. DYNAMICS OF CONSULTANT/CHURCH RELATIONSHIP:**

Schein is the MIT Sloan Fellows Professor of Management, who identifies three types of consulting relationships:<sup>3</sup>

- 1) **The Purchase of Expertise.** The client identifies their dilemma and searches for the expert. The mandate becomes, "*Here is my problem, bring me back my answer and tell me how much it will cost.*"
- 2) **The Doctor-Patient.** The consultant makes a diagnosis and offers a prescription. The mandate becomes, "*Find out what is wrong and tell us how to fix it.*"
- 3) **Process Facilitator-Participant/Learner.** The client owns the problem throughout the process, and the consultant simultaneously helps and trains them in assessing, diagnosing and implementing organizational change. The mandate becomes, "*Help us as we figure out what's really wrong and live out long term solutions.*"

Schein advocates the third method, *process facilitation*. According to him, the problem with the first two models is this. In *purchase of expertise*, the client may not know what the real problem(s) is, and therefore may not seek the expertise they really need. In *doctor-patient*, the client might not be willing or able to follow the prescription. How many people have been told by a doctor that their health problems would be resolved if they would lose 50 pounds, but found themselves unwilling or unable to follow the prescription?

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<sup>3</sup> Edgar H. Schein, *Process Consultation: Lessons for Managers and Consultants*, vol. II (Reading: Addison-Wesley Publishing Company, 1987), 22-35.

According to this line of logic, the third method increases the client's capabilities to solve their own problems and engage in their own process of learning, such that they are less dependent on the consultant for future problem solving. The third type also leads to increased capacity for implementation, since the client has taken greater ownership of the problem and its analysis, they will hopefully take greater ownership of implementing action.

Question for churches:

1. If we hire a consultant as *expert* or *doctor* are we ready/willing to follow the *doctor's orders*?
2. If we (as leaders) think we are ready to do so, would a majority of the congregation also be ready to do so?
3. Are we looking for a short term fix (then an *expert* or *doctor* relationship might work) or long term change? (then *process-facilitation* might be best).

### C. COLOR:

In thinking about a process of change, a helpful paradigm is to think of the major schools of thought as categorized by a color.<sup>4</sup>

#### Yellow-print

thinking is based on concepts of power, in which various interests, conflicts and power players are taken into consideration in navigating change. Getting formal and informal stakeholders on board is critical. Therefore, facilitating communication, lobbying, negotiating and third-party conflict resolution are interventions used. Yellow is the color of power (the sun) and the type of process (i.e. coalition forming around a fire.)

#### Blue-print

thinking is based on rational-design, in which change is controlled through planning, managing and monitoring the change efforts. The assumption is that people will change if a clearly specified result is laid down beforehand. Think first (define and design) and then do (implement). The change agent brings expertise in what would be the best design. People's preferences are not to interfere with the end design. The clear blueprint/plan depends on good project management capabilities to implement. Blue is the color of architectural blue-prints, which are drawn up before and guarantee a certain outcome if followed. Examples: TQM, restructuring, business process design, Six Sigma.

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<sup>4</sup> Léon de Caluwé and Hans Vermaak, "Change Paradigms: An Overview," *Organization Development Journal* 22, no. 4 (2004).

### Red-print

thinking is based on human resource management, in which making the most of human talent is stressed through motivational and job/person fit strategies. Gift identification processes for lay people would be a church based example of this. The focus is on motivating people and devising systems that facilitate this, such as training and development. People make changes happen if they are guided in the right direction, and when they are sufficiently motivated. Red is the color of human blood, because the human must be attracted, influenced and stimulated to effective action. Examples: HRM (human resources management), McGregor, Hertzberg-Theory X&Y)

### Green-print

thinking has its roots in action-learning theories,<sup>5</sup> in which change and learning are inseparably linked in an action/reflection model. People are provided with means for learning more effective ways of acting, which then leads to implementing organizational change. The organization and the people in it are encouraged to take ownership of their learning, and to increase their learning capacity. Thinking and doing are linked, the process takes time, and the role of change agents is to facilitate this process. Green is the color of growth in nature, as well as the green light to give people a forward momentum. Examples: Learning Organization, action-research.

### White-print

thinking comes out of chaos and network thinking, in which the change agent makes sense out of complexity, often through looking at historical patterns, and psychological mechanisms of the organization as a system. Influencing underlying dynamics is the key. Change agents try to understand where there are opportunities for the seeds of renewal and creativity. Removing obstacles to these seeds of possibility is critical. The change agents are sense-makers who seek to lead in-depth observation, analysis of underlying drivers, and challenging interventions when needed. The goal is to observe what is happening and why, remove obstacles, get initiatives and experiments going, and empower people. White is the color which reflects all others, and this style seeks to combine elements of the other methods. White also connotes openness, and allows for an unexpected outcome. Examples: Appreciative Inquiry, open space meetings, self-managing teams.

*CLEAR AS BROWN MUD, RIGHT?!*

1. Which of these *colors* most fits for your situation?
2. Can you discern in the church consultant/agency's methodology shadings of these colors?
3. What type of conversation do you want to have, which type of conversation will best lead your church to effective implementation?

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<sup>5</sup> Peter Senge, *The Fifth Discipline*.

Most consultants use some combination of these change methods (colors). But some might tend more toward blue or some combination of white/green. So for the purpose of discernment, these two categories could be contrasted with the following questions:

#### BLUE:

- Do we have agreement with the blue-print model of church being proposed?
- Do we have agreement and buy-in throughout our church about our identity and purpose such that we are ready to go right to designing plans and implementing them?
- Do we have sufficient project management capabilities within our congregation in order to take a blue-print and effectively follow it?
- Do we have a cooperative spirit amongst ourselves to follow the blue-print? (If the outside expert tells us what to do, are we likely to do it?)
- Would a blue-print incite resistance or positively channel our energy? Do we have energy to be channeled?

#### WHITE/GREEN:

- Do we have the patience to engage in a process that might look ambiguous or slow to some, but aims at deeper, systemic change within our church?
- Do we work well when we are participating in a facilitated process that seeks to increase our capabilities?
- How important is it to base where we go on where we are now and where we've been? (How important is it to us to have continuity and evolution?)
- What's our need to have input and control over our sense of purpose, and how that purpose gets translated into outcomes? The higher our need, the more white/green would fit for us.

### References

- Block, Peter. *Flawless Consulting*. San Francisco: Jossey-Bass Pfeiffer, 1981.
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