

THE PASTOR'S DILEMMA

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INSTRUCTORS' NOTES

CASE DESCRIPTION

This illustrative case study can be used to show the difficulties of working with volunteers that serve on an organization's advisory board. The case focus is on root cause analysis and problem resolution. Survey design and issues in dealing with a strong-minded leader are also considered. Upon completion of case assignments, students will be able to identify the steps in root cause analysis. The case has a difficulty level of two to three and is designed to be taught in one class hour. Depending on the depth of detail the instructor intends to pursue, preparation time for the students will take from one to two hours.

CASE SYNOPSIS

A pastor is faced with a dilemma. Although his church is located in a growing area, the church's attendance, membership, and giving are stagnant. The church's advisory panel, led by an overbearing president, believe the solution is to combine the two Sunday services into one service. They are, however, basing their decision on questionable assumptions, a lack of data not recognized by the panel, poor analysis of data that is available, and pressure from the panel's president. This case explores the dynamics of working with a panel comprised of volunteers, working with a headstrong leader, considerations for the effective process of data gathering and problem-solving, and suggestions for investigating and instituting change in an organization not typically subject to change.

RECOMMENDATIONS FOR TEACHING APPROACHES

The case is designed to be used in an undergraduate business management course to help students understand the complexities of working with volunteer boards, assertive leadership, questionable assumptions, and flawed data collection and analysis.

Students should expect to spend one to two hours studying the case and accompanying questions. Discussion of the case can be conducted in small groups or as a class. If small group discussion is selected, it is recommended that the groups be brought together before the conclusion of the exercise to compare responses to the case.

Failure to adequately examine the situation led the church leadership to make assumptions that were likely incorrect leading to a difficult and somewhat contentious decision regarding the operation of the church, specifically the combination of two services into one. The instructor may choose to initiate discussion of the problem-solving process or simply go to the questions offered in the General Questions for Class Discussion section that follows.

Root Cause Analysis & Problem Resolution

1. What is the root problem?

It is offered in the case that attendance had become stagnant as are revenues, coupled with little growth in membership. Initially in the problem-solving process, the requirement is to separate fact from opinion or conjecture (“What is problem solving,” n.d.). In this case, it is known that attendance, revenue, and membership have essentially become dormant. So, these could be considered as symptoms of a larger problem rather than the problem itself. Lower attendance will reasonably lead to lower revenue, and with lower attendance, it could also be assumed that membership growth would slow (it is not likely that someone would join a church without first attending). With both revenue and membership tied to attendance, the analysis then becomes what is causing the lower attendance.

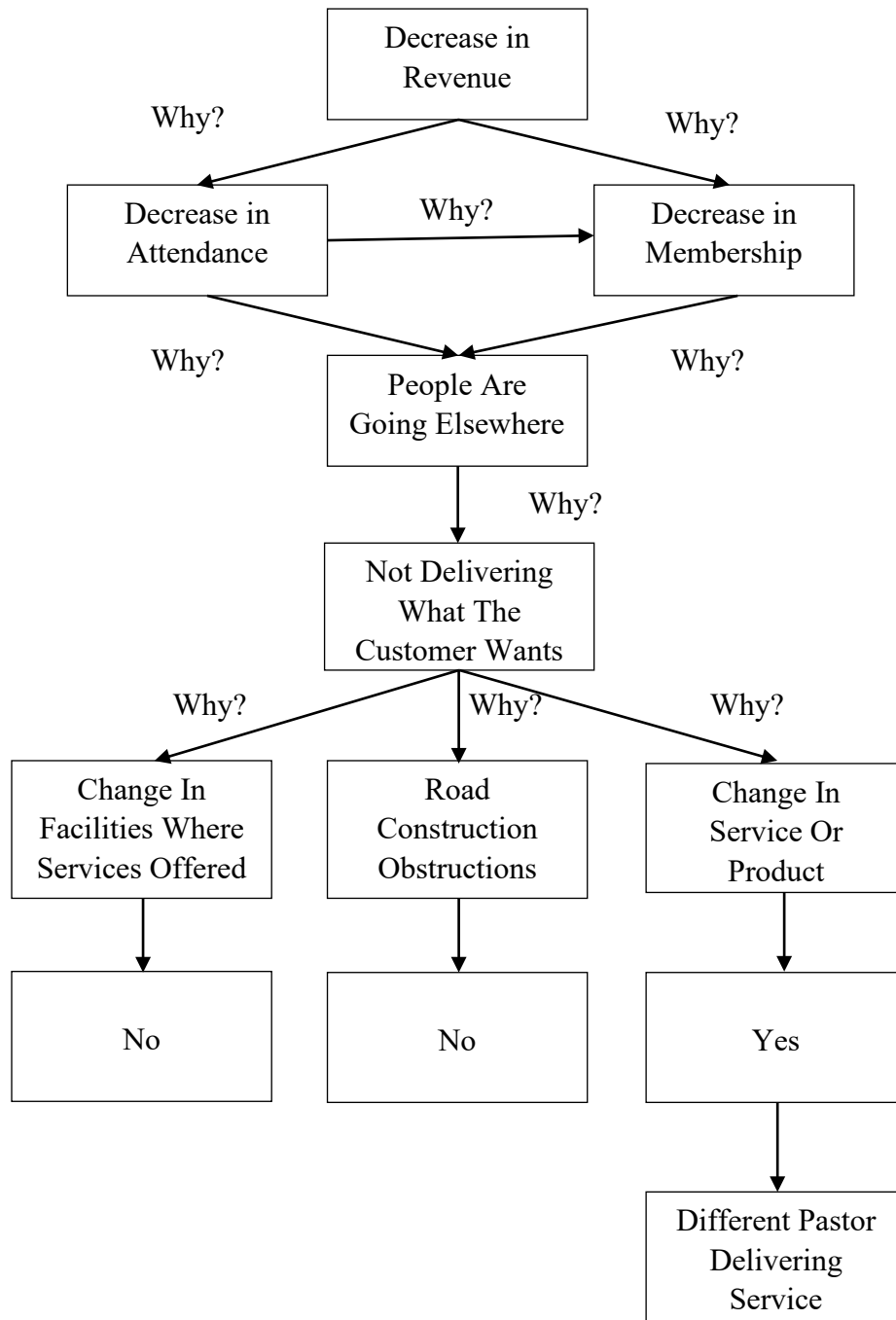
If this linkage is not apparent to students, a simple “why analysis” may help students see the connection. The intent of root cause analysis is to continue to ask “why” until you reach a person, process or policy (“The art of root cause analysis,” n.d.). The instructor can lead the students through the “why” process and record the responses on a chalkboard or whiteboard in the classroom or an electronic whiteboard if teaching virtually. The first question would then be “why are revenues down?” and the response would be “because attendance is down.” The same question then applies for “why is membership down?” and the response would be the same as before – “because attendance is down.”

In terms of revenue, one might make a case that attendance would not impact electronic giving and contributions that are mailed in, which would be an insightful observation, but in this case, revenues from outside sources were negligible and had no material affect on church revenues. Affected revenue was generated through contributions during church services. Other astute students may question the revenue generated by the children’s daycare noted in the case. As the daycare was primarily used by the community during the workweek, its use remained steady and, as such, neither an increase nor decrease in revenue was experienced during this time.

Since attendance is the common factor to both lower revenue and membership, the next “why” is then “why is attendance down?” One additional “why” question would then result in a response of “because people are going elsewhere” or some similar statement. The next “why” could be answered with “the customer isn’t getting what he or she wants,” and the process continues with “why” until we reach a point when we ask “what changed?”

The use of Change Analysis will assist in determining the root cause. Change Analysis is “applicable to situations where a system’s performance has shifted significantly. It explores changes made in people, equipment, information, and more that may have contributed to the change in performance” (“What is root cause analysis (RCA)?,” n.d.). A review of the case will reveal that other than a change in pastors, no other change occurred during the time under review. Graphically, this could be represented as follows:

Figure 1



In the listing of “Not Getting What The Customer Wants,” there could be additional points such as “Inclement Weather For Extended Period” or something of that nature, but the list was annotated for brevity. Note that at no time did the church council or President Paul Forthright conduct a root cause analysis (“why”) or investigate changes that may have occurred

prior to and during the time of decreased attendance and membership, and lower revenues, possibly leading to an erroneous conclusion, notwithstanding the problems associated with reorienting early service parishioners to a new time and type of service.

General Questions for Class Discussion

During class, the instructor can stimulate discussion by offering the following questions and observations:

2. What should have Martin done before the vote to combine services?

In an ideal situation, Martin should have known the attendance, membership, and giving had become stagnant and, just as important, that the advisory panel was concerned enough to consider taking action. We do not know the level of communications that Martin had with Paul or the council. Martin should have had a constant dialogue with the panel so there would be adequate time to thoughtfully consider options for improving the areas of concern. As a leader, Martin should have approached the council with this information and his concerns. This situation should have entailed a plea to the congregation in general for advice. An open forum meeting or listening session, for example, informing the congregation of the benefit of voicing their opinions would likely lead to a more productive meeting (“7 keys to planning a successful church business meeting,” 2018). While this may not have brought clear resolution to the situation, it would have given the council an opportunity to hear from the congregation and, in particular, those that may be adversely affected by the panel’s decision.

3. What should Martin do now?

There are no clear answers to this question. Ideally, Martin should have a good working relationship with Paul as well as each member of the panel. While no one, including Martin, questioned the validity of comparing Lent’s church attendance with the previous six weeks, it is an issue that could still be addressed. Church attendance typically increases during the season of Lent (Wikipedia, 2021). By comparing the current six-week period with the prior six-week period, the panel is not making a valid comparison. Assuming the church secretary has kept accurate and complete records, it would be a simple process to gather the records of attendance, membership, and giving for the same time last year. While not definitive, it would lead to a conclusion that either Paul and the advisory panel were moving in the right direction or call into question the assumptions that Paul and the council have made. At this point, Martin can either reluctantly go along with the council’s recommendations or contact Paul to hold the email until the analysis could occur. It should be remembered that even this will not necessarily lead to a definitive conclusion. Regardless of the outcome of the study, it only produces additional insight.

4. What are the potential causes of stagnant church attendance and giving when the surrounding area is growing?

Depending on an individual’s background, they may or may not be drawn to the beliefs of that particular church. Others, with young families, may be looking for “mega-churches” that can provide a wide array of activities (Bird, 2009). It is possible that for some potential parishioners,

the services don't "feel right." In other words, they may be in a church that does not offer the sermon content that they desire (Saad, 2017).

Note that while this question specifically deals with the church and its parishioners, the instructor could draw an analogy with any service or retail business and how it attempts to serve its customers. In order for a business to be successful, it must satisfy the needs of its customers. To satisfy that need, the business owner/operator must identify the needs and wants of the business's customers ("Identifying customer needs," 2016).

5. Did Paul and the advisory panel adequately explore those potential causes?

No. Paul and the advisory council assumed (possibly erroneously) that the cause of the stagnation was relatively low attendance at each of the services. The meager attendance led to a lack of participation which was followed by smaller monetary contributions. They did not consider other causes of the low attendance but quickly concluded that the proper action would be to combine the services. They did not survey the parishioners before any action to uncover possible factors impacting attendance and membership. At no time did any members of the panel consider the possibility that the pastor may not be adequately meeting the needs of the congregation. An anonymous survey utilizing email, postal mail, and direct deposit questionnaires with open-ended questions would likely give insight into the issue (Askopinion.com, n.d.).

6. Does Paul's vision for the church differ from the other council members' vision?

Possibly. We don't have a definitive answer to this question. Paul states that he would "turn this church into something to be proud of," indicating that there are some facets of the church, at least from his viewpoint, that are in need of improvement. The fact that church council members did not make any overt efforts to challenge Paul's actions may be subtle agreement with Paul's assessment and actions or it may be that no one on the panel was willing to challenge Paul's authority ("10 Reasons why small churches stay small," 2013).

The complicity with Paul's actions may be indicative of peer pressure that each council member felt to not raise objections to Paul's directives, or the reluctance of the members to disrupt the apparent harmonious nature of the council. Two phenomena may be occurring during this time. Groupthink, particularly self-censorship, may be causing council members to remain silent during discussions of Paul's vision and methods of improving church attendance (Cherry, n.d.). The need to conform, as illustrated by the Solomon Asch experiments, may have induced peer pressure among the members to comply with the majority wishes, even though their views may have contradicted the opinions of others in the group (McLeod, n.d.). These actions may have also impacted the discussions regarding the combination of services. In the case of Paul's vision and the council meeting on combining the services, council members may have either been reluctant to voice disagreement with Paul or other council members, or believed it was important to remain unified in the face of significant changes and decided to suppress their true attitude toward the topics being discussed.

7. What leadership characteristics should the church advisory panel consider when electing a president?

First, it should be someone that is a member of the church, providing an indication that they are committed to the church, and willing to assume the leadership position. They must also be willing to dedicate the time necessary to actively participate in all aspects of panel activities (Grisham, 2020). Ideally, that person would have served on the church council for a period of time so that they understand the goals of the council and has developed the relationships with its members which will foster communication among panel members. Effective church leaders will be team players and work well with others to get things done (Patricia, 2018). As the president is charged with leading the council, it would seem that formal or informal training in management and leadership coupled with some understanding of business concepts would be needed (“Is business training for church staff necessary?” n.d.).

It is important that the leader of the council have good communication skills (“Great leaders have strong interpersonal skills,” 2019). This includes listening as well as engaging other organizational members in conversations rather than a top-down distribution of information (Groysberg & Slind, 2012). With the improved flow of communication, trust will build between the council president and council members (“Leadership communication: How to build trust in the workplace,” n.d.), likely fostering more robust discussions and avoiding Groupthink and peer pressure to conform. Prior to the election of a council president, members should evaluate the leadership skills that the candidate will bring to the position. While it may be difficult to assess a candidate’s skills, the exercise should at least give the council’s members pause to consider the working relationship they will have with their newly elected leader. While it is not known if Groupthink or the need for conformity played a part in the council’s decision-making process, or if Paul had forced the council to accept his recommendations, it is important that the council consider the ability of the leader to adjust his or her leadership style to accommodate the council members’ personalities. Identifying a candidate as an authentic leader or as someone that will intimidate others (Schneider, n.d.) will play an important part in setting a positive working relationship between the council leader and members.

8. Could Chris or Martin have taken action to avoid the situation?

Team building for the council may have helped members be more thorough in their approach to church issues. Due to Chris’s upbeat personality and lack of significant problems during his tenure as the church pastor, there was little need for introspection on the church council. This inaction could be viewed as a partial failure of his leadership in not ensuring the panel was ready to navigate adverse situations, regardless of who was leading the church. Ongoing team building for the council may have helped the members proceed with a comprehensive investigation of the drop in attendance and revenues rather than relying on the more vocal members. After assuming the position of pastor, Martin should have become aware that the council had not undergone any team building instruction. At that point, he could have successfully implemented the training (Watkins 2016).

9. Based on your coursework, what else could have been done to either prevent the situation from occurring or minimize its effects once implemented.

Each class will have different responses to this question. Based on the courses completed and practical experience, students could be expected to note the need for open and honest communication between members of the advisory board, its president, and the pastor. This should include recognition that while leadership of the council is necessary, each member should be provided the opportunity to voice his/her opinion without peer pressure for a particular course of action. Also, it should be noted that the role of the pastor is key to the success of the advisory board by setting expectations of behavior and church goals.

Some students oriented toward a leadership view may recognize Paul Forthright's value as a leader in a different capacity. While he may be viewed as "bullying" the advisory board's members into decisions that may or may not be in the church's best interest, his personality type may be useful in specifically defined areas such as negotiating contracts for landscaping services or building renovations.

Those students focused on strategy may point out the need for a comprehensive view of the services offered by the church and a prioritization of those services based on importance and urgency ("Time Management Matrix by Stephen Covey - Urgent vs Important" 2009). Other students, possibly those with an interest in the field of human resources, may draw attention to the need for an "onboarding" process for new advisory committee members. This will ensure that new members will have exposure to the board's expectations and norms of behavior.

10. Do we know for certain that the combination of services is the sole reason for the increase in attendance?

No. Combining the services during one of the periods when church attendance typically increases may lead to a "false positive." In other words, the panel has decided to implement a change when it is difficult to determine the true cause of the change (Weems, 2016). No mention was made as to whether the combined total attendance for this year was compared to the total attendance of both services for last year at the same time (Lent). This comparison would likely give a better indication as to whether the combination of services is responsible for the increase in attendance rather than making the comparison with the preceding six weeks (Wikipedia contributors, 2021).

Survey Issue Questions for Class Discussion

11. Were there any potential issues with the survey and the method to distribute the survey?

Yes. Distributing the survey only by email is problematic for several reasons. First, the church office used the email addresses of those parishioners that it had on file. There are no assurances that the church office had email addresses for all of its parishioners. For survey purposes, results may be skewed if households are surveyed rather than individuals (Hubrich & Wittwer, 2014). While the church office has email addresses of some of its parishioners, the

email address may be for a household rather than an individual. As a result, the advisory council may get one response from a family rather than multiple responses representing every member of the group, which could vary significantly. Also, visitors and potential members may not have provided the church office with an email address. As a result, the church council may be missing those attendees that are evaluating the church and could provide a fresh opinion of the church service. The survey did not offer open-ended questions to allow respondents to voice their opinions on topics but rather the degree of their satisfaction toward the question's focus. The panel did not consider that the parishioners may be able to offer insight into areas for improvement without Paul's significant influence.

12. How could the survey be improved?

No questions were asked regarding the message or content of the services. Paul and the council assumed that the pastor and the content were meeting the parishioners' expectations. As noted in the epilogue, this may have been an erroneous assumption. Since neither Paul nor anyone on the council had knowledge of proper survey design nor root cause analysis, they made erroneous assumptions and neglected to ask basic open-ended questions such as "What could be done to improve the services?" and "What do you see as the critical need of this church?" (Dawer, n.d.). By making these assumptions and bypassing fundamental questions regarding the church and its services, the council missed the opportunity to identify the likely reason(s) for the decline in attendance – the pastor was not able to engage the congregation. The council, moreover, did not start the process by querying the congregation when it was evident that attendance was slipping. While students may assume that that the advisory council would be knowledgeable of the feelings and attitudes of the congregation, Paul's assertive personality may have moved the council to start with the assumption that the pastor's personality and his sermon delivery were acceptable to the congregation, and it must be something else that is the cause of the decrease in attendance. Note that Paul's survey does not comprehensively address specific elements of the church service. It does, however, include a brief assessment of the physical attributes and environment of the church. As a result, no information was gathered on other segments of the service that could be improved.

ADDITIONAL INFORMATION

Although it was not addressed by Paul or the council members, the elimination of the early church service created significant change to the routines of the church members. In order to facilitate a successful transition, rather than distributing an email or making an announcement from the pulpit informing the congregation of the revised schedule, the president and council should have initiated a process for introducing the change to the congregation. This would likely have reduced the resistance to the elimination of the early service and helped pave the way for any future schedule revisions. The use of Kotter's 8-step process for leading change ("The 8-Step Process for Leading Change," 2016) would increase the likelihood that members of the congregation were "on board" with the change in church service offerings rather than having the change dictated to them by a group whose primary function was to represent the congregation.

The instructor may choose to introduce another facet of Paul Forthright's actions. During the council's vote regarding the combination of church services, Paul held a vote by a show of

hands. A visible sign of voting has been shown to affect others through peer pressure (Crossman, n.d.). Paul, with a domineering personality, may have reinforced that effect thereby resulting in a biased vote by the council. Instructors interested in the effect of peer pressure are directed to the film “12 Angry Men” starring Henry Fonda which, among other topics, includes the power that one person has to elicit change.

EPILOGUE

After the combining services, the church experienced minor growth in attendance, membership, and giving. Not long after the implementation, however, Martin transferred to another church. The new pastor was energetic and excited about his new assignment. During his tenure, attendance, membership, and giving increased significantly to the point that within a year of the new pastor’s arrival, Paul and the advisory panel reinstated the 8:30 AM service. Paul was convinced that he had solved the problem by combining the services and his actions got the church through the difficult period. As a comprehensive analysis of the attendance and membership was never conducted, including the previous period of Lent, the root cause will never be known.

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