

Level 5 Shadowing

Description and Comparison to a Coached Level 5 Experience

Shadowing is an alternative way that someone can complete Society Level 5 as they seek to pursue certification. The standard *Coached* Level 5 consulting project is defined by the Level 5 participant. They consult a church and are coached through the process by a Society representative.



In *Shadowing*, the participant observes the work of a certified consultant to learn from them. The certified consultant consults a church and they are shadowed by the Level 5 participant as the certified consultant does a consultation. The certified consultant follows Society guidelines and defines the level of involvement in the consultation by the Level 5 participant. There may be more than one shadowing participant on a consultation. Shadowing may occur remotely, or a combination of remotely and on site with the certified consultant.

Purpose

The Society will continue to provide the standard Coached Level 5 experience. However, we have found that some aspiring consultants find it difficult to be engaged in a consultation by a church. The purpose of the Shadowing alternative is to help aspiring consultants complete Level 5 and gain experience that will help them complete certification.

Fees

Because the Society will administrate the process, it will continue to charge \$395 for its involvement in helping the participant move on to certification through Level 5.

In addition, the certified consultant that is being shadowed, has the freedom to charge the participant an additional fee that is a fair representation of the amount of their effort. These fees will be set by each certified consultant.

The Role of the Society

The Society administrates the process and fosters the relationship between the Level 5 participant and a certified consultant. The Society does the following:

- Trains certified consultants in the requirements and process of a Level 5 Shadowing
- Sets guidelines on qualifying types of consultations. Not all consultations will qualify. See below
- Sets guidelines on how to offer, set fees for, and conduct a Shadowing opportunity
- Approves qualifying consultations for Shadowing and makes aspiring consultants aware of these
- Processes the start and finish of Level 5 Shadowing consultations

The Role of the Certified Consultant

Certified consultants have the option of participating in Level 5 Shadowing. They are not required to do so on any of their consultations. However, if they decide to participate, they will:

- Follow the guidelines set by the Society

- Protect the church by disclosing the desire to allow shadowing
- Optional: Use a *Shadowing Covenant* between you and the aspiring consultant to set expectations and to preserve confidentiality for the church. See final page of this document for an example and customize for your use.
- Submit their consultation for review and approval as a qualifying Shadowing project. Identify the level of involvement to be allowed by the church and/or certified consultant
- Engage the inquiries of aspiring consultants interested in shadowing
- Define the level of shadowing involvement that will be by email, phone, or in person
- Negotiate an agreement on the level of involvement and fees for shadowing
- Notify the Society when such an agreement is accomplished
- Allow the Level 5 participant to shadow the consultation
- Notify the Society when shadowing is complete



The Role of the Shadowing Participant

The Level 5 Shadowing participant is expected to follow the type of shadowing as defined by the certified consultant. They will:

- Agree with the certified consultant on their involvement and fees required
- Preserve confidentiality for the church
- Register with the Society and pay for their Level 5 Shadowing
- Participate throughout the consultation as expected by the certified consultant

Note: Level 5 completion does not constitute certification. There are other requirements for certification that are defined on the Society website. One requirement is that the aspiring consultant completes a second consultation, on their own, after the completion of their Level 5 Shadowing. This second consultation must be a comprehensive one.

Qualifying Level 5 Shadowing Consultations and Level of Shadowing

Not all consultations will qualify for Level 5 Shadowing projects. Church turnaround, improvements in church health, revitalization and strengthening, vision development, and conflict resolution will qualify.

These are three types of comprehensive consultations that will qualify. For each type, a suggested level of shadowing involvement is also defined.

1. A comprehensive Church Health Assessment as defined in Society Levels 1-4 training. This will include some form of Church Health Survey, a demographic study, a request for and analysis of church history and data, review of finances, review and tour of facilities, interview of staff and board members, observation of worship, a listing of recommendations, a complete written report, and a presentation to leadership of findings and recommendations.

Level of Shadowing – which can all be done remotely by email and phone:

- Awareness of planned process by phone or email
- Copied on reports and studies
- Brief written report on the reports and studies submitted to certified consultant
- Brief written recommendations by Level 5 participant submitted to certified consultant

- Copied on final written report and copied on your presentation
- 1000-word report on process, and observations of written report and presentation, and what was learned by shadowing

2. Facilitated strategic ministry planning and development of a church vision and strategies.

Level of Shadowing – which can all be done remotely by email and phone:

- Awareness of planned process by phone or email
- Copied on all meeting presentations and correspondence between church and certified consultant
- 1000-word report on process, and observations of written report and presentation, and what was learned by shadowing

3. Facilitated conflict resolution between individuals or factions in the church.

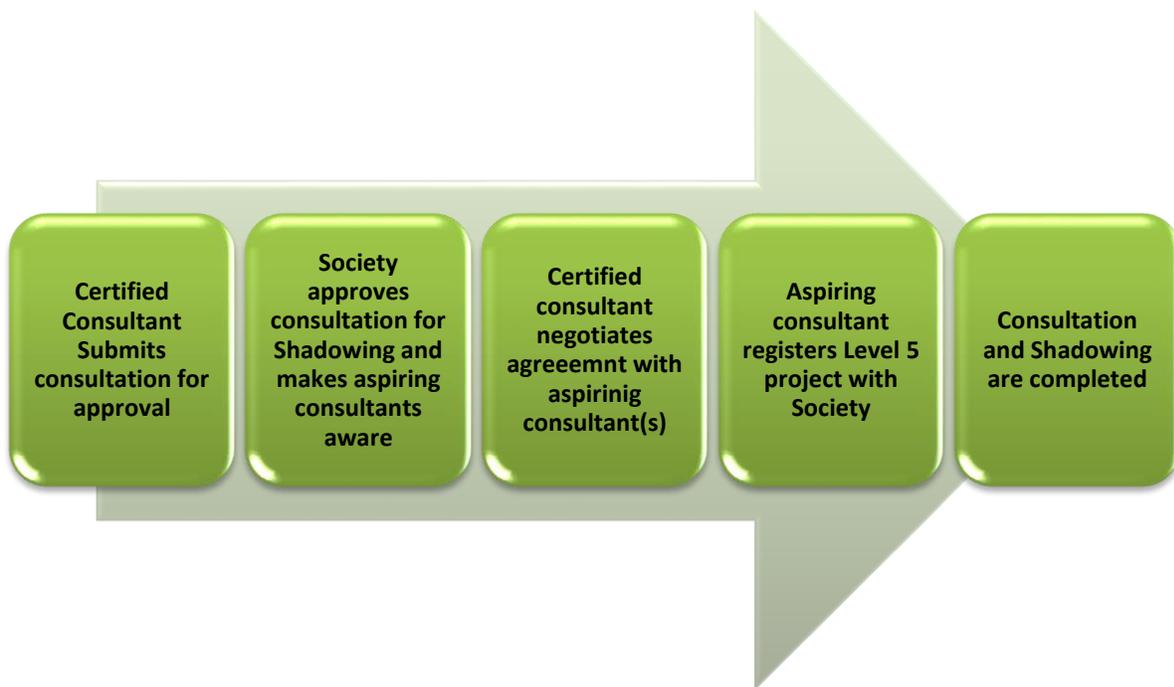
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The Society will consider other projects proposed by certified consultants but reserves the right to approve or disapprove proposals.

Visual of Process and Sequence

The five major sequential steps of a Level 5 Shadowing are as follows:



Covenant of Commitment

Society for Church Consulting Level 5 Shadowing

Because of the importance of my Level 5 Shadowing experience and relationships, I agree to the following Covenant of Commitment:

- Pray for the church and the person I am shadowing
- Pray for my personal development during this shadowing project
- Be a positive participant that enthusiastically supports the project
- Be a learner
- Follow the expectations set by the person I am shadowing
- Respect the time and method of communication set by the person I am shadowing
- Preserve the confidentiality of the church by not sharing with others the details of the consultation
- Commit the time necessary to complete the shadowing
- Follow the guidelines set by the Society for Church Consulting

I desire to be a part of this Shadowing relationship and commit before the Lord to these expectations:

Name

Date

"In view of all this, we are making a binding agreement, putting it in writing ..." Nehemiah 9:38