

# Barrie Presbytery

## Congregational Visitation Standards



Congregational Life Team

First Edition



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## INTRODUCTION

Within the Presbyterian system the immediate care and pastoral oversight of both ministers and congregations is the responsibility of the Presbytery. One of the tools that Barrie Presbytery uses to fulfil this responsibility is a congregational visitation. It is the deep desire of the Presbytery to express joy, care, and concern as required, through the visitation process. Congregations and presbyters are encouraged to embrace this process as one that seeks to affirm and strengthen the faithful ministry of local communities within the Presbytery.

What follows in this document is a process and procedures for the manner in which Presbytery-appointed congregational visitations will occur. These procedures are not meant to be exhaustive, but rather used as a guide for the Presbytery and visitation teams. It is necessary to have some standard areas that all visitations will address. Five broad areas are set forth that will provide not only a blueprint for the outcome, (the visitation report,) but also the questions, discussion and nature of the visit itself. Within each of these five broad areas, subsections have been presented in order to aid both the visitation team and congregations, as they prepare for and conduct the visit. Therefore, it is important to emphasize that this document is a guide for the visit; each congregation will require unique questions about the specific ministries and mission of specific pastoral charges.

As the church changes, so also these standards will require change. Therefore, it is reasonable to expect that this document will be modified from time to time. Questions about and suggestions for changes are welcome and should be directed to the Team Leader of the Congregational Life Team of Barrie Presbytery.



## PROCESS & PROCEDURES

### PROCESS

In the months of June and January the Congregational Life Team shall ask the Presbytery, in its wisdom, to commission visitations to three congregations. As such, six pastoral charges will receive visits each year; three in the fall and three in the winter/spring. The dates of visitation will be arranged between the Visitation Leader and congregation minister. The date of the visit will be shared with the congregation and all committees, thus encouraging full participation in the process. The visit will occur on Sunday morning, including the service of worship, a meeting with the minister and a meeting with the session at a minimum. All members and adherents will be encouraged to complete the questionnaire prior to the visitation. Following the visitation, the visitation team will complete a report with any recommendations. The report and any recommendations will be presented to the Presbytery at its next meeting.

### PROCEDURES

Specific aspects of the above outlined visitation process are shared in greater detail below. Experience encourages that the following procedures be followed for all visits:

#### **The Visitation Team**

A team of three people will conduct each visit. The team will consist of at least one minister and one elder, and at least one male and one female. The team will have a Visitation Leader, who will be named by the Congregational Life Team when the visit is commissioned by the Presbytery. The Presbytery, through the Congregational Life Team, will select visitation Teams. Nine individuals will be part of the visitation team yearly and each individual will be expected to participate in two visits: one in the fall and another in the winter/spring. Specific gifts and skills are required by individuals (and the team) visitors; members of visitation teams will be invited to be part of this group and encouraged not to assume other Presbytery responsibilities for that year; due to the importance and time involved in visitations. Ideally members of the visitation team will serve for a minimum of two years.

#### **Frequency**

Based on the process outlined above each congregation should receive a visit at least once every five years. While this is a guideline, it is by no means a requirement. Many factors affect when a visit will be commissioned, none more important than when changes in pastoral leadership occur. When the minister(s) in a pastoral charge changes no visit should occur within their first year of service. After a year of service has been completed a visit should be commissioned and occur before the end of the minister's second year of service.

#### **The Visit**

The Visit will occur on a Sunday morning and at a minimum include: attending the service of worship, a meeting with the minister(s), a meeting with the session and a meeting with the congregation. Ideally, all members of the visitation team will attend a service of worship. The presbytery will cover the cost of pulpit supply for an active minister. Visitation teams are encouraged to meet with other staff members, relevant boards or committees as necessary during the visit. Sections A through E in this document, outline the areas that visit should



focus on: Governance & Structure, Mission, Spiritual Health, Leadership, and Property & Finances. Each congregation is unique and careful attention should be given to specific joys or concerns that are raised. It may be appropriate for the visitation team to follow-up with a specific group at another date, before the report is completed. During the visit the Minister(s) is encouraged to be present for the entire visit; at no time should the Minister(s) be asked to leave. In the past, ministers were expected to leave during the congregational visit portion, this practice is now strongly discouraged. **If individual members, or groups, from the congregation have not, at a prior time, addressed concerns with the Minister(s), the visit is not the appropriate time to raise these concerns publicly.** If there are challenges or concerns related to the Minister(s) they should be present to hear these concerns (except in specific cases related to the Leading with Care and Sexual Abuse and Sexual Harassment Policies of the church for which separate procedures are outlined in the aforementioned documents.)

### **Questionnaires**

A congregational questionnaire is included as page 8 in this document. Questionnaires are to be distributed as part of the visitation process to all members, adherents and leaders in the congregation. The name of the individual completing the questionnaire form is optional, but encouraged. If follow-up is required related to specific items named on the questionnaire, then having access to individual persons for further dialogue will assist the visitation team. The questionnaires are confidential, in that the visitation team and Congregational Life Team Leader will be the only groups that have access to them. When the Presbytery receives and deals with the visitation report all questionnaires will be destroyed.

### **The Visitation Report** *(note page 7 addresses this topic in greater detail)*

The Visitation report will be no more than three pages in length and should be organized using Sections A through E, outlined in this document, thus addressing: Governance & Structure, Mission, Spiritual Health, Leadership, Property & Finances, and any recommendations. The Visitation Report will be completed by the visitation team, reviewed by the Session of the congregation, shared with the Congregational Life Team, who will present the report and any recommendations to the Presbytery.

### **Follow-Up**

A member of the three-person visitation team who conducted the visit will follow up on any recommendations that are carried by the Presbytery, within six months. Recommendations that do not require action, while often pleasant, are discouraged. The visitation team will name a follow-up person, when recommendations are passed.

### **Presbytery Intervention Team**

At any point in the visitation process if it becomes evident that a major concern related to congregational health, conflict or viability arises then the visitation team (through the visitation leader) will contact the Team Leader of the Congregational Life Team, who will report to the Presbytery Executive. The Executive Team has the option of activating the Intervention Team to complete a specific task based on the standing orders of the Presbytery. If the Intervention Team is activated, the work of the visitation team will be suspended, pending the completed action of the Intervention Team.



## SECTION A: GOVERNANCE & STRUCTURE

Governance & Structure addresses the manner in which the congregation is organized and how it functions as a whole system. As part of the visit, and within the report, the following areas should be discussed:

- Organizational Structure
- Session & Board Effectiveness (recruitment of members, terms of service)
- Communication of Information to the congregation
- Leading with Care Policy
- Records (Session, Membership, Baptism, Marriage)
- Relationship with Presbytery

## SECTION B: MISSION

Mission concerns the manner in which the congregation understands its call to go and make disciples of all people and nations. It addresses the ways the congregation acts as a change agent within the local, national and global community. As part of the visit and within the report the following areas should be discussed:

- Understanding of Mission
- Strategic Plan
- Future Focus
- Outreach
- Local Community Engagement
- Support of PWS&D and Presbyterians Sharing
- Connections with the universal catholic church

## SECTION C: SPIRITUAL HEALTH

Spiritual Health seeks to assess the opportunities and interest as part of the congregations' response to the Gospel of Jesus Christ. This section, to a large degree, explores what it is the church actually does, from weekly activities, to programs to special events. As part of the visit and within the report the following areas should be discussed:

- Worship, Music & Liturgy (Word & Sacraments)
- Study and Growth Opportunities
- Faith Formation Ministries (Children, Youth, Emerging Adults, Adults, Seniors)
- Prayer
- Pastoral Care (Visitation)
- Congregation as Community



## SECTION D: LEADERSHIP

Leadership speaks to the various ways people play a role in forming and shaping the Christian community. A focus on volunteers and staff, discernment and education and planning for the future are essential to this category. As part of the visit and within the report the following areas should be discussed:

- Recruitment & Training of Leaders
- Education for Leadership
- Staff: Ministerial, Music, Education, Administrative, Custodial (Oversight, Job Descriptions, Remuneration, Continuing Education, Vacation, Support)
- Volunteers (Oversight, Job Descriptions, Support)
- Discernment of Gifts & Skills
- Succession Plan

## SECTION E: PROPERTY & FINANCES

Property & Finances refers to the way the congregation manages the business and stewardship affairs of the church. As part of the visit and within the report the following areas should be discussed:

- Status of Assets
- Annual Budget
- Financial Stewardship Program
- Property (Maintenance, Insurance)
- Property Planning (Property Usage, Does the property serve the Mission of the Church?)



## THE VISITATION REPORT

### **Report Content**

The visitation report should be a maximum of three pages in length and will include the following sections:

- Introduction & Background
- Governance & Structure
- Mission
- Spiritual Health
- Leadership
- Property & Finances
- Summary & Recommendations

Report sections will vary in length depending on the nature of the visit and the content discussed. While it is important to provide specific details if there are particular joys or concerns to be addressed, it is not necessary to 'tell the whole story' in writing. The report summary should name the significant findings of the visits and specifically highlight any commendation. The recommendations section, if required, should focus on items that require action. While recommendations of commendation are pleasant and affirming, recommendations should reflect a need for action.

### **Report Process**

The visitation team will draft the Visitation Report within twenty-one days of the visit. The report, when agreed upon by all team members, will be forwarded to the session(s) of the pastoral charge for their review. If the session(s) has any concerns about the content of the report, more specifically the recommendations, they should contact the visitation team leader. Once the visitation team and session have 'signed off' on the report it will be presented to the Congregational Life Team. The Congregational Life Team, after reviewing the report, will present the report and any recommendations to the Presbytery for its consideration. If any recommendations are passed, they will be followed-up by the appointed person within six months.







## APPENDIX I: RESOURCES FOR VISITATIONS

Below are additional resources that may be helpful to visitation teams who are preparing to conduct a visit to a congregation.

Called to Covenant <http://presbyterian.ca/resources-ministry/>  
A resource for strengthening congregation-presbytery relationship (visitation questions)

Leading with Care <http://presbyterian.ca/leading-with-care/>  
A policy for ensuring a climate of safety in your church

Book of Forms <http://presbyterian.ca/bof/>  
The polity and governance of the PCC

Church Matters <http://presbyterian.ca/elders/>  
A Board of Managers Handbook

Equipping Elders <http://presbyterian.ca/elders/>  
A resource for Elders in your church

Official PCC Documents <http://presbyterian.ca/resources-od/>  
Subordinate Standards & Confessing the Faith Today



## APPENDIX II: SAMPLE GUIDED QUESTIONS FOR VISITS

### **Session**

- Has being a leader helped you grow in your spiritual life?
- Does the session have a vision/plan for the how the congregation will be the church over the next five years?
- Does the model and structure of session (life/term service) work well for you?
- Do the session and Ministry Staff work together to fulfil the mission of the church?
- Tell us about your practices related to Leading with Care.
- What are the current challenges, joys, issues the session is in dialogue about?
- Tell us about the activities/programs that are currently in place.
- What new programs/ministries are being developed and nurtured?
- Tell us about the opportunities for Faith Formation within the congregation: children, youth, adults.
- How are you connected to the Presbytery, Synod and General Assembly?

### **Board of Managers / Property & Finance Team**

- What are the gifts and challenges of the church property?
- Are the facilities adequate for the ministry and mission of the church?
- Do the facilities meet Leading with Care Standards?
- Does the congregation encourage faithful stewardship?
- Is the congregation aware of and supporting Presbyterians Sharing and PWS&D?
- Are there other ministries/missions the congregation supports?
- How is the annual budget prepared?
- Are two signatures required on all cheques the church writes?
- Are the offerings counted on church property?

### **Professional Church Worker**

- Tell us about your sense of call to this congregation.
- Do you feel supported by the Session and Congregation?
- Do you have adequate office space/working space at the church?
- Does your stipend/housing/allowances meet your needs? When was it last reviewed?
- Who are your mentors/coaches in ministry?
- Do you have a set Sabbath day?
- Tell us about your most recent vacation and study leave time.
- What are your commitments to other ministries within the Presbyterian Church, outside the congregation; Presbytery, Synod, General Assembly?

### **Congregation**

- Why do you attend this church, rather than another?
- What does your congregation do well?
- What could your congregation do better?
- What is your congregation known for in the local community?
- What does the Presbytery need to know about your church?