

# The Presbytery of Barrie

## Congregational Visitation Standards



Congregational Life Team

Second Edition  
2017

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## **INTRODUCTION**

Within Presbyterian governance the immediate care and pastoral oversight of both ministers and congregations is the responsibility of the Presbytery. One of the tools the Presbytery of Barrie 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 congregational communities within the Presbytery.

What follows in this document is a process with 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 visitation itself. Within each of these five broad areas, subsections have been presented to aid both the visitation team and congregation as they prepare for the visitation. It is important to emphasize that this document is a guide for the visitation; each congregation/pastoral charge will require unique questions about its specific ministries and mission.

As the church changes, so also will these standards 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 the Presbytery of Barrie.



## PROCESS & PROCEDURES

### PROCESS

In the month of September the Congregational Life Team shall ask the Presbytery, in its wisdom, to commission six visitations teams and to appoint each team to one of six pastoral charges to receive a visitation. The date of each visitation will be arranged by the visitation team leader and the pastoral charge's moderator or interim moderator (*visitations should be arranged no later than the beginning of March to allow sufficient time for the report approval process to be completed by the June meeting of Presbytery*). The date of the visitation will be shared with the congregation(s) and all committees, thus encouraging full participation in the process. The visitation will begin with the service of worship (or services of worship, in the case of multi-point charges), followed by a meeting with the minister, a meeting with the session(s), and a meeting with the congregation(s), 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 visitation team may deem appropriate. The report and recommendations (if any) will be presented to the Presbytery by the Congregational Life Team at the first possible opportunity (note the review process on page 7 under heading **The Visitation Report**).

### PROCEDURES

Specific aspects of the above-outlined visitation process are shared in greater detail below. Experience suggests that the following procedures be followed for all visitations.

#### **—The Visitation Team—**

A team of three people will conduct each visitation. The team will consist of at least one minister and one elder, and at least one male and one female person. The team will have a leader (see below). The Congregational Life Team will give careful consideration to the formation of the visitation teams, their leaders, and the charges each team is to visit. All members of the court, including able members on the appendix to the roll of Presbytery, can be expected to "take their turn" on a visitation team. Some visitations may require greater experience and wisdom than others, which the Congregation Life Team and the Presbytery need to take into consideration when forming/commissioning teams to particular charges; however, the leader of each team must have prior experience with visitations and, preferably, have some years of experience as a minister in a church or as an elder within the courts of the church. The first person named in each team shall be considered to be the leader and commissioned to be so by the Presbytery.

#### **—Frequency—**

Based on the process outlined above, each congregation should receive a visitation at least once every five years. While this is a guideline, it is not a requirement. Many factors affect when a visitation will be commissioned, none more important than when changes in pastoral leadership occur. When the minister(s) in a pastoral charge changes, no visitation should occur within the first year of service. After a year of service has been completed, a visitation should be commissioned and occur before the end of the minister's second year of service. Normally, no visitation will be made during periods of vacancy when a congregation is actively searching for a minister.



—*The Visitation*—

The visitation will occur on a Sunday and at a minimum include: attending the service(s) of worship, a meeting with the minister(s), a meeting with the session(s), a meeting with the Board(s) of Managers or equivalent committee(s), and a meeting with the congregation(s). Ideally, all members of the visitation team will attend the service(s) 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 visitation. Sections A through E in this document, outline the areas the visitation should focus on: *Governance & Structure, Mission, Spiritual Health, Leadership, Property & Finances*. Each congregation/pastoral charge 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 visitation the minister(s) is encouraged to be present for the entire visitation; at no time should the minister(s) be asked to leave. In the past, ministers were expected to leave during the congregational visitation 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 visitation is not the appropriate time to raise these concerns publicly.*** If there are challenges or concerns related to the minister(s), the minister(s) 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 relating 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; only the visitation team and the Congregational Life Team leader will have access to them. Envelopes shall be distributed with the questionnaires so that the completed forms can be sealed within them to protect confidentiality. Sealed envelopes should be forwarded to the visitation team leader no less than two weeks before the date of the visitation so that the visitation team has time to review and consider the responses prior to the visitation. 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 recommendations (if any)*. The visitation report will be completed by the visitation team, reviewed by the session(s) of the congregation(s), and shared with the Congregational Life Team which will present the report and any recommendations to the Presbytery.

—*Follow-Up*—

A member of the visitation team which conducted the visitation 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—**

If at any point in the visitation process a major concern relating to congregational health, conflict, or viability arises, the visitation team (through the visitation team leader) will contact the leader of the Congregational Life Team, who will report the concern 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 visitation, 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, Leading with Care — *see check list on page 11*)
- Relationship with Presbytery

*Please note that Session records are to be scrutinized and attested as part of the visitation process, and that it is to be part of the visitation report whether they are “neatly and correctly kept” or “incorrectly kept”, with recommendations as required.*

**SECTION B: MISSION**

Mission concerns the manner in which the congregation understands its call to go and make disciples of all peoples and nations. It addresses the ways the congregation acts in the name of Christ within the local, national and global community. As part of the visitation 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 for and the congregation's interest in its 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 visitation 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 visitation 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 visitation 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 limited to three pages in length and will include the follow sections:

- Introduction & Background
- Governance & Structure (*including a report on the review of Session records*)
- Mission
- Spiritual Health
- Leadership
- Property & Finances
- Summary & Recommendations

Report sections will vary in length depending on the nature of the visitation 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 visitation team 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 21 days of the visitation. The report, when agreed upon by all team members, will be forwarded to the session(s) of the pastoral charge for review. If the session(s) has any concerns about the content of the report, more specifically the recommendations, it should contact the visitation team leader. Once the visitation team and session(s) 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 recommendations (if any) to the Presbytery for its consideration. If any recommendations are passed, they will be followed-up by the appointed person within six months.

On occasion, a session may not be satisfied with the visitation report and its recommendations, even after seeking remediation from the visitation team, and will not “sign off”. It should be noted that the visitation report does not belong to the session but to the visitation team, and that the visitation team has the duty and the freedom to make its report as it sees fit. Matters of factual inaccuracy within the report must be corrected before it is sent to the Congregational Life Team.







### **APPENDIX I: RESOURCES FOR VISITATIONS**

Below are additional resources that may be helpful to visitation teams who are preparing to conduct a visitation 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 VISITATIONS**

### **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(s) and congregation(s)?
- Do you have adequate office space/working space at the church?
- Do 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?



**CHECK LIST FOR VISITATION TEAMS**

- Attested Session Minutes
- Attested Membership Roll
- Attested Marriage Registry Book
- Attested Burial Registry Book
- Attested Baptismal Registry Book
- Ask when the Roll was last revised (required yearly)
- Confirmed that Communion is celebrated at least four times per year
- Confirmed the existence of adequate liability insurance for the building and congregation
- Confirmed that two signatures are required for the signing of cheques
- Confirmed that all offerings are counted and recorded prior to leaving the building
- Reviewed church *Leading With Care* policy and covenant
- Reviewed *Leading With Care* police-check records
- Reviewed church *Leading With Care* fire evacuation plan