

**Alberta and Northwest Conference
The United Church of Canada**

**Suggested Guidelines
For
Presbytery Oversight Visits
To Pastoral Charges**

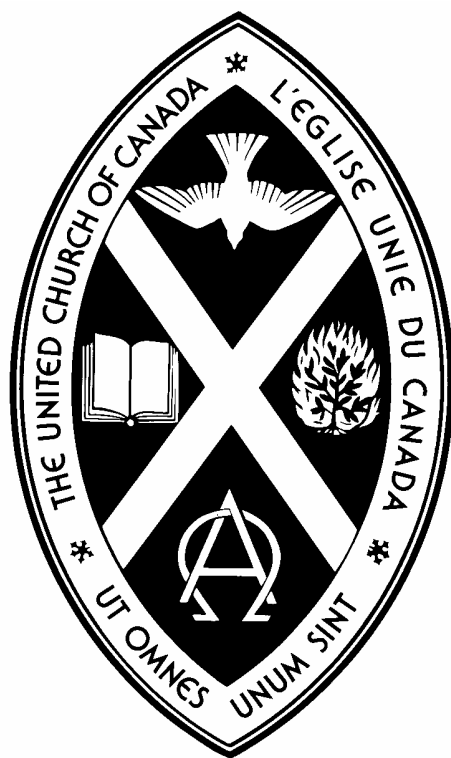


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A Guide for Presbytery Visitation Teams

Triennial visits to Pastoral Charges by Presbytery representatives is a requirement of *The Manual of The United Church of Canada* (cf. Section 332). The visit is primarily pastoral in nature, an opportunity for Presbytery to listen, support, encourage and offer counsel to the Pastoral Charge. It is also an opportunity for the Presbytery to exercise its responsibility to oversee the life and work of the Pastoral Charge, and for the Pastoral Charge to demonstrate its accountability to the Presbytery.

An effective Presbytery visit can help a Pastoral Charge appreciate itself and its gifts. It can also alert the Pastoral Charge and Presbytery to potential problems. It is the responsibility of the Presbytery Pastoral Oversight Committee (or equivalent) to appoint visiting teams and to name a team coordinator (leader). The ideal team will consist of between two and four visitors including clergy and lay, men and women. It is helpful to have at least one team member who has experience in a similarly sized Pastoral Charge to the one being visited.

This guide contains material which has been developed to assist in Presbytery visitations.

Appendix A-10 is a form for providing feedback about this handbook. Upon completion of a Presbytery Oversight visit, a member of the visiting team is asked to complete and return this form. Your feedback will be used in updating the handbook periodically so that it will be a high quality resource for use within Alberta and Northwest Conference.

An effective visit should include:

- interviews with ministry personnel
- interviews with support staff
- interviews with church leaders (chair people of the Official Board/Council, members of the Ministry and Personnel Committee and/or other key committees)
- an overview of the facilities
- an open meeting with members of the Official Board/Council, and members and adherents of the Pastoral Charge.
- a meeting at the end of the visit with the ministry personnel to provide an initial oral summary of the visiting team's observations

Purpose of the Presbytery Oversight Visit

- To encourage the Pastoral Charge to articulate its mission.
- To provide an opportunity for the Pastoral Charge to share the positive aspects of its life and work, and to express appreciation and affirmation.
- To assist the Pastoral Charge in discovering things on which they can build.
- To provide an opportunity for the Pastoral Charge to do self-reflection and self-evaluation.
- To explore with the Pastoral Charge how leadership is exercised in its life and work, including the roles and responsibilities of lay leaders and ministry personnel.
- To facilitate communication within the Pastoral Charge if needed.
- To listen to concerns, help identify obstacles or potential problems and to make suggestions or referrals that may assist the Pastoral Charge with making creative changes as needed.
- To explain the kinds of support that are available to the Pastoral Charge from Presbytery, Conference, General Council and other sources.
- To enhance the relationship between the Pastoral Charge and the larger Church.

Suggested Timeline for a Presbytery Oversight Visit

6-8 Weeks before the Oversight Visit

- **The Presbytery Oversight Committee coordinator of visitations** should communicate with the members of the visiting team well in advance of the proposed visit to provide resources and contact information and to set expectations about possible dates for the visit and the submission of the report of the visit. The coordinator needs to be clear about how the team leader is to be selected (by the Oversight Committee or the visiting team), and make sure that the team determines who will prepare the written report.

- **The team leader**, in consultation with the chairperson of the Official Board/Council, arranges the date, the times, and the places for the visit.

4-6 Weeks before the Visit

- Once arrangements have been set, **the team leader** sends a follow up letter (see Appendix A-1) to each of the ministry personnel and to chairperson of the Official Board/Council confirming the arrangements and requesting that together they ensure the following is attended to on the Pastoral Charge before the visit:
 - The visit and its purpose are announced to the congregation(s) in the worship bulletin for at least two Sundays before the visit. (see Appendix A-2)
 - Meetings with the ministry personnel, staff people, church leaders and Official Board/Council and congregation(s) are scheduled and announced.
 - It is helpful if the team receives as many of the following resources as possible: (*provided by the Pastoral Charge, the Presbytery or team research*)
 - a copy of the latest Annual Report
 - the mission statement and constitution
 - copies of Pastoral Charge policies and procedures
 - a summary sheet of financial statistics, including Mission and Service Fund information
 - a summary of the latest Pastoral Charge statistics from *The Yearbook of The United Church of Canada*

- for first year visits:*
 - a copy of the Joint Needs Assessment Committee report

- for triennial visits:*
 - copies of position descriptions for all staff and ministry personnel
 - a copy of the report from the previous Presbytery Oversight visit
 - a summary of actions taken on recommendations or conditions from the report of the previous Presbytery Oversight visit

- Include at least two copies of the Pre-Visitation Data Sheet for completion and return to the team leader prior to the visit (see Appendix A-3).

3 Weeks before the Visit

- It is helpful if **the visiting team leader, or other designated member of the visiting team**, could speak personally to the Official Board/Council chairperson and the Ministry and Personnel Committee chairperson to clarify the purpose of the visit and to become aware of any concerns about the visit itself or matters in the life and work of the Pastoral Charge.

1-2 Weeks before the Visit

- **The members of the visiting team** should read the *Questions for Discussion* (see page 7) and use them as a guide during the interviews. The information they request is necessary to compile an adequate picture of the Pastoral Charge. It is helpful if the team establishes a conversational atmosphere in all the interviews. A straight question and answer format can result in a person or group feeling “interrogated”. The Open Session Format (see page 15) is a guide as to how to proceed in a meeting with the Official Board and/or congregation.
- **The visiting team** should meet to plan the visit, ensuring that:
 - each team member has a role to play during the visit.
 - all visiting team members have read and understand the *Questions for Discussion* and other materials they will use.
 - hymns are selected and prayers are prepared for the open session worship
 - the team has planned the sequence of the visit.
 - the team has the resources needed (including felt pen, newsprint, an accompanist, etc.)
 - one member of the team is prepared to see the final report is compiled and submitted.

During the Visit

- **The members of the visiting team** should give feedback to the Pastoral Charge during the visit. It bears repeating that the visiting team needs to affirm the Pastoral Charge, as well to help the people see where growth is needed. In other words it is important for the team to give encouragement to the local Pastoral Charge and its leaders.

No More than Two Weeks after the Visit

- **The member of the visiting team designated to write the Visitation Report** should prepare a complete written report as soon as possible, and no later than two weeks, after the visit. The format included in the Appendix A-5 is offered as a guide.

2-3 Weeks after the Visit

- **The member of the visiting team designated to write the Visitation Report** sends a draft copy of the report, clearly marked “Draft”, to each the following:
 - the members of the visiting team.
 - each ministry personnel
 - the chairperson of the Official Board/Council of the Pastoral Charge.

- **Each person receiving the draft report** is asked to read the report and indicate if there are comments that need clarification or more explanation, if there are significant omissions, if there are spelling or typographical errors. ***It is not appropriate for those reading the draft to challenge the observations or recommendations of the visiting team.***

- **Each person receiving the draft report** returns their comments to the member of the visiting team designated to write the Visitation Report, who prepares the final Report of the Visitation, and sends the final report to the convenor of the Presbytery Oversight Committee (or equivalent).

3 -4 Weeks after the Visit

- **The Presbytery Oversight Committee** reviews the report and its recommendations, noting items for follow-up or referral to other Presbytery Committees. The Presbytery Oversight Committee ensures that the final Visitation Report is presented to the Presbytery for adoption, and that appropriate action is taken on items for follow-up and referral.
- **The Presbytery Oversight Committee** acknowledges and thanks the visiting team for the work they have done on behalf of the Presbytery.

Immediately after the Presbytery Meeting at which the report is adopted

The Pastoral Oversight Committee sends a copy of the adopted Visitation Report to each ministry personnel and to the chairperson of the Official Board of the Pastoral Charge, and files the original copy of the report either in its committee files or with the Secretary of the Presbytery according to the practices of the Presbytery. A copy of the Presbytery Visitation Evaluation Report is also sent to the chairperson of the Official Board/Council.

Resources for First Year Visits

Many Presbyteries have taken up the practice of visiting Pastoral Charges one year after the beginning of a new pastoral relationship. Unlike triennial visits, First Year Visits are not a requirement of the polity of The United Church, but Presbyteries, Pastoral Charges and ministry personnel have found the visit to come at a time when the pastoral relationship may be ready to deepen. The Presbytery can offer support and encouragement for this to happen.

Aims of the First Year Visit:

The first year of a pastoral relationship can be quite an idyllic time as congregations and ministry personnel get to know each other. Often they are both on their best behaviour! It is a period in which congregations learn about the gifts, interests, energy and style of the new minister. Ministry personnel learn about customs, past experiences and potential opportunities of the congregation. Then the time comes for a new level of engagement in ministry together.

The First Year Visit is an opportunity for both congregations and ministry personnel to articulate what they have learned about each other and to consider out loud where they might go together. It is a chance to identify shared strengths and interests. It is a chance to revisit the Needs Assessment and the position descriptions and determine if expectations need to be modified now that a relationship has been formed. For this reason, it is often helpful if the representatives of the Presbytery who served on the Joint Needs Assessment or Joint Search Committee participate in the First Year Visit.

It is important for the visiting team to be listening carefully for how communication is taking place in the pastoral relationship, and to encourage it to happen in healthy ways. It is a good opportunity to check in with the Ministry and Personnel Committee to ensure that they are meeting and that they understand their role in supporting the pastoral relationship.

Above all, the atmosphere of the First Year Visit should be positive and encouraging. Even if negative feelings are expressed, it can become an opportunity to promote healthy communication which can deepen the relationship and avoid problems in the future.

Questions for Discussion

The following questions are guides to lead discussions about the life and work of the Pastoral Charge. It is hoped that the discussion will cover as many of these topics as possible.

Section 1: Questions for a First Year Visit

Questions for the Ministry Personnel

1. What strengths have you identified at this congregation?
2. What challenges have you identified at this congregations?
3. Have you encountered conflict? If so, how has it been resolved?
4. In what ways have you been able to apply your personal gifts of ministry?
5. Have you found any disconnect between your first year of ministry and the expectations of the Joint Needs Assessment Report?
6. How have you and your family/partner transitioned into life of the community?
7. What hopes do you have for this ministry as it goes forward
8. How often do you find yourself saying, “In my last Pastoral Charge...”?
9. Is there anything else you would like to say to the visiting team?

Questions for the members and adherents of the Pastoral Charge

1. How are you helping to fulfil the expectations of the Joint Needs Assessment Report?
2. Who are the significant people in the history of this congregation?
3. In what ways have you helped the ministry personnel and their family/partner transition into the life of the community?
4. What hopes do you have for this ministry as it goes forward?
5. Are there Presbytery or Conference resources or connections with which we could help the Pastoral Charge?
6. Is there anything else you would like to say to the visiting team?

Section 2: Questions for Triennial Visits

Questions for the Ministry Personnel

1. What excites you here? What aspects of your work do you look forward to?
2. What are your visions for this congregation and are they achievable?
3. What are your disappointments?
4. How do you see your role and relationship to the congregation? What does the congregation expect from you?
5. What is your sense of this congregation? Are you supported in:
 - your style of worship
 - your ministry to the people
 - your ideas for outreach
 - your lifestyle, educational needs, recreation etc.
6. When were the terms of your call or appointment reviewed? Were you consulted during the review?
7. How is your accountability to the congregation demonstrated?
8. How do you feel about the manse or housing allowance provided for you?
9. Describe the procedure for manse improvements, furnishings etc.
10. Do you feel satisfied with this?
11. Describe your choice and frequency of continuing education.
12. Where do you look for vocational support (theological, pastoral, institutional etc.)?
13. How often does the Ministry and Personnel Committee meet and how would you describe your relationship to it?
14. Describe your relationship with other ministry personnel in the area (United Church and other denominations).
15. How do you make space in your life for the things that renew you? Where do you look for personal support?
16. Is there anything else you would like to say to the visiting team?

Questions for a Team Ministry

1. How would you describe your ministry team? Are there clear responsibilities, and how are responsibilities shared?
2. Does the congregation seem clear about the way the team carries out the ministry? Are there areas of confusion about responsibilities or task assignments within the congregation?
3. Is there a plan in place to address dissatisfaction or conflict in the ministry team? Please describe the plan. What resources are available to you:
 - in the congregation?
 - outside the congregation?
4. How often do you meet to discuss administrative and program matters? Do meetings include other staff?
5. Describe a typical team meeting. Do team members take time for personal sharing, devotions, theological reflection, looking ahead?
6. How satisfied are you with the way the time is used in this team ministry? How satisfied are you with the way individual interests, skills and gifts are used within the team?
7. Have you taken intentional opportunities to do team building events? How often? What resources did you use?
8. In what ways do you affirm and celebrate the relationship?

Questions for Other Staff (Select appropriate questions)

1. How clear are you about your duties as a staff member?
2. How clear are you about the role of other staff members and how their tasks relate to yours?
3. To whom do you feel accountable? How do they help or hinder your job?
4. Is there a clear distinction between your role as a staff member and your role as a member of the congregation?
5. In what ways do you relate to the Ministry and Personnel Committee? How does this committee deal with non-clergy staff?
6. When were the terms of your employment reviewed? Were you consulted during the review?
7. Comment on your level of satisfaction with your pay and benefits?
8. Do you work 14 hours or more per week? If so, are you enrolled in the United Church Pension Plan and Group Insurance Plan? (This is required.)
9. How are you included in planning, in worship, in programming, in pastoral support, etc. of this church? How do you feel about this?
10. What do you see as stumbling blocks to a smooth running church?
11. Is there anything else you would like to say to the visiting team?

Questions for the Ministry and Personnel Committee

1. Does each committee member have a copy of *A Handbook for Ministry and Personnel Committees*? Does the committee use the schedule of meetings found in Appendix B of the handbook?
2. Describe the role of the Ministry and Personnel Committee on this Pastoral Charge. How do you feel about what is expected of the Ministry and Personnel Committee?
3. How does the Ministry and Personnel Committee relate to the Official Board? Do you feel the recommendations of the Ministry and Personnel Committee are given appropriate consideration by the Official Board and its committees?
4. Do you feel equipped and supported for the duties you are asked to do? Are there additional kinds of support that would be helpful?
5. Is there a plan in place to address dissatisfaction or conflict within the congregation? Please describe the plan.
6. Do all members of the staff have a position description which includes the expectations of their role within the Pastoral Charge's ministry? How often are position descriptions reviewed? Are the staff consulted during the review?
7. How often are terms of employment and terms of call or appointment reviewed? Are the staff consulted during the review?
8. Are all lay employees who are working 14 hours or more per week enrolled in the Pension and Group Insurance Plan as required by the policies of The United Church of Canada?
9. How are the priorities for the staff's duties established? How do you feel about the priorities that have been set or adopted?
10. How do you perceive each of the staff members feels about their work? In what aspects of their work does each staff member demonstrate particular interest, skill or natural ability?
11. Can you identify areas of work where the staff do not show interest, skill or natural ability? How are those areas attended to?
12. How do you see the staff working to include and encourage the members of the congregation in the ministry of the Pastoral Charge? Are there obstacles?
13. How many days off per week does each staff member have? Do staff members ever struggle with getting time off or taking time off? If so, how is that acknowledged and addressed?
14. Is the Police Record Check of each of the ministry personnel in compliance with the current policy of The United Church of Canada? What kind of screening procedures are in place for other staff members?
15. How would you describe the relationship that presently exists between the ministry personnel and the members and adherents of the Pastoral Charge?

16. How would you describe, the working relationship between the ministry personnel and the various administrative and program committees of the Pastoral Charge?
17. Is there a good balance in the time the ministry personnel spend at work in the church and at home in their personal life?
18. To what extent are the ministry personnel involved in the work of the wider church, and how do the people of the congregation feel about it? To what extent are the ministry personnel involved in ministry to the community at large, and how do the people of the congregation feel about it?
19. Do the ministry personnel demonstrate good time management skills? Please comment.
20. What have the ministry personnel done in the way of continuing education in the past year? Do the ministry personnel use three weeks each year for continuing education? Does the Ministry and Personnel Committee have input into the content and scheduling of continuing education for the ministry personnel?
21. Do the ministry personnel participate in a support group of any description?
22. Is there anything else you would like to say to the visiting team?

Questions for the chairperson and members of the Official Board/Council and other key Pastoral Charge leaders

In addition to discussing the questions below, this meeting time can be used to review the responses provided on the Pre-Visitation Information Sheet (Appendix3).

1. Do you feel equipped and supported for the duties you are asked to do? Are there additional kinds of support that would be helpful?
2. Describe the organizational structure of the Pastoral Charge? Does it serve the needs and support the ministry of the Pastoral Charge? What are the challenges?
3. Does the Pastoral Charge have a mission statement? Does the Official Board establish priorities and set goals for the ministry of the Pastoral Charge? How, and how often, is that done?
 1. How are people invited to participate on Pastoral Charge committees? Is there wide participation? What is the policy regarding length of service on committees?
 2. How are committee members made aware of their responsibilities?
 3. What is the policy of the Pastoral Charge for screening people who, on behalf of the Pastoral Charge, have contact with children, youth, the elderly and others who may be considered vulnerable. Has the Pastoral Charge made use of The United Church of Canada resources *Faithful Footsteps* and *A Tender Trust*?
 4. Does the Pastoral Charge have policies regarding requests for marriages, baptisms, funerals? What other policies has the Official Board approved? How often are policies reviewed?
 5. How does the Official Board/Council seek to equip and support the people of the Pastoral Charge in their ministries:
 - within the Pastoral Charge?
 - within the wider church?
 - within the community at large?
 - in their personal sense of discipleship?
 6. How are program leaders, teachers, and musicians offered support and encouragement?
 7. How is ministry shared between the ministry personnel and the people of the Pastoral Charge?
 8. Describe the Pastoral Charge's stewardship program. How are people encouraged to offer financial and other support for the ministry of the Pastoral Charge?
 9. Approximately what percentage of the annual budget is allocated to programming?
 10. Is the salary paid to the staff in keeping with the financial potential of your Pastoral Charge?

Questions for the Open Meeting with the Official Board/Council, and members and adherents of the Pastoral Charge

1. How are things going?
2. What are you excited about?
3. What challenges do you face?
4. Tell us about your worship life: Sunday by Sunday, Sacraments, special services, children's involvement, etc.
5. Tell us about the Faith Formation programs being offered for children, youth and adults: Sunday School, Bible study, Confirmation classes, Vacation Bible School, mid-week programs, etc.
6. What projects are you undertaking?
7. If this is a multi-point Pastoral Charge, describe the relationship between the congregations.
8. How does the Ministry and Personnel Committee function?
9. Would you like to know more about the role of the Ministry and Personnel Committee?
10. What do you know about the Mission and Service Fund?
11. How did you learn about it?
12. How are Pastoral Charge delegates to Presbytery and Conference chosen? Are they seen as members of the Official Board?
13. How are reports about Presbytery and Conference made to the Official Board and the Pastoral Charge?
14. How do the ministry personnel and Pastoral Charge delegate fulfil their responsibilities to the wider church (attending meetings, participating in committee work, etc.)
15. How does the congregation understand and support this work?
16. Describe the relationship between the Pastoral Charge and the Presbytery?
Describe the relationship between the Pastoral Charge and the Conference, and the Pastoral Charge and the General Council.
17. Is your Pastoral Charge aware of the resources of the wider church, and does it access them?
18. Describe your relationship with the local Ministerial Association, and other denominations in your community.
19. Is there anything else you would like to tell the visiting team? What other questions do you have for the visiting team?

A Format for an Open Meeting with the Official Board/Council and Members and Adherents of the Pastoral Charge

*At the discretion of the visiting team, the ministry personnel of the Pastoral Charge may attend the first part of the meeting. They are to graciously excuse themselves after the visiting team has reviewed the purpose and the procedures of the visit (see: *Setting the Mood*, below) Just as the ministry personnel have had the opportunity of conversation with the visiting team without members of the Pastoral Charge present, this is the opportunity for the members of the Pastoral Charge to be given an opportunity to reflect upon their life and work without ministry personnel present.*

❖ Introduction

The members of the visiting team introduce themselves by name and Pastoral Charge. If possible, those in attendance are asked to introduce themselves by name and congregation.

❖ Devotional

The team members offer a time of prayer, Scripture, reflection and song on an appropriate theme.

❖ Setting the Mood

Members of the visiting team review the purpose and procedures of the visit. They explain that the Presbytery is interested in hearing about the life and work of the Pastoral Charge, to affirm what is going well and to hear about any concerns or difficulties facing the Pastoral Charge. The visiting team may share a few positive discoveries from conversations held earlier in the day. They should clarify that in their report, along with a description of what they hear, they may recommend ways that the Presbytery can support the ministry of the Pastoral Charge.

In order to encourage participation, it is good to take some time to ask people to introduce themselves. Once people have said even their name and a short sentence about themselves, they are more likely to offer a comment as the evening progresses.

❖ Questions for the Open Meeting with the Official Board/Council, and members and adherents of the Pastoral Charge

The members of the visiting team may choose to engage this part of the evening in several ways. A large group setting allows everyone to hear all the comments being offered, however some people feel uncomfortable speaking in a large gathering. Small groups usually get everyone talking, but then it is important to have a time when comments made in small groups are shared with all who are present.

The questions provided in the previous section are suggestions. If the conversation goes in a different direction than what the team has planned, allow some time to see if useful insights emerge. Being open to the flow of the conversation may provide more information about the Pastoral Charge than being tied to the questions.

❖ **Initial Feedback**

Remember to allow some time at the end of the meeting to offer an initial summary of what the visiting team has heard. Highlight the positive aspects of the life and work of the Pastoral Charge, and acknowledge the challenges without escalating them into crises. Indicate that thought will be given to supporting the Pastoral Charge in addressing obstacles and concerns. What is said in this time will, in large part, be what is conveyed to the ministry personnel following the close of the meeting.

Briefly review the next steps in the process. Remind the people of the Pastoral Charge that the Presbytery will support them with information and resources to address any difficulties, but that Presbytery will not fix problems for them. The people of the Pastoral Charge are responsible for their life and work together.

Thank the people of the Pastoral Charge for attending the evening, participating in the conversation and for their hospitality.

❖ **Closing Prayer**

The team members offer a prayer to close the evening in which they call to mind the Pastoral Charge, the Presbytery and The United Church of Canada. A hymn may be sung. A blessing or benediction would be appropriate.

❖ **Following the Open Meeting**

Remind the Official Board/Council of the Pastoral Charge to complete the evaluation form in Appendix A-6 and send it to the convenor of the Presbytery Pastoral Oversight Committee.

Meet with the ministry personnel to share initial feedback about the life and work of the Pastoral Charge.

Handling Difficult or Sensitive Situations

Occasionally you may find yourself in a setting where there is conflict or strong criticism. Usually your team would have some advance warning of this but not always. Here are some tips for handling these situations.

1. Stay calm. It's not your problem and you can be more helpful if you don't take on the congregation's problem as your own. Your "non-anxious presence" will help the congregation to reduce their own anxiety as well.
2. Be curious. Show openness to hear every viewpoint, slowing down the process if necessary to let everyone be heard. Paraphrase to show the person that you have understood.
3. If a person voices an opinion in a hostile way, there may still be some helpful information hidden in the message. A cantankerous person will often say things that others are feeling but are too "nice" to say. To show interest in what the person is saying and to reframe it in a more acceptable way may disarm the emotional charge.
4. Regardless of #3 above, if people persists in aggressive, hostile, disrespectful or abusive behaviour, they should be confronted and offered a more acceptable way to express their viewpoint.
5. If things get too heated, a break for prayer can often change the climate quickly.
6. If criticism is voiced, particularly of the ministry personnel when they are out of the room, it may be useful to get a show of hands to indicate how many others agree with each statement. You may even seek more specific information by asking how many (1) Strongly agree, (2) Partly agree, (3) Have no opinion, (4) Partly disagree, (5) Strongly disagree. This is very helpful information to put the criticism in context and to avoid giving too much power to a vocal minority. It also helps those who may be so taken aback by the criticism that they are silent, wishing later they had spoken up.
7. Remember that in any visit, the ministry personnel are the ones who feel the most vulnerable. Work hard to be open, transparent and fair with them. Avoid surprises as much as possible. After the open session with the Official Board/Council and people of the Pastoral Charge, meet with the ministry personnel to let them know the gist of what you heard. This way they are not left wondering if "the shoe is going to drop" in the form of the written report.
8. If there is bad news for the ministry personnel in the report (or any other key individual) make sure that person receives a copy of the report before anyone else does. Provide or arrange for some pastoral support if you think it wise. (The Regional Resource Personnel or Conference Personnel Minister may be helpful here.)

Writing the Report

“On completion of an Oversight Visit, a written report will be prepared by the Presbytery visitors and shared both with the Pastoral Charge or Presbytery ministry and with the Presbytery.” [The Manual, Sec.332 c (vi)].

Complete the written report as soon as possible, and within 2 weeks after the Oversight Visit, before vital information or the mood of the visit is forgotten. It is appreciated when there is some consistency between the reports submitted to the Presbytery from different Pastoral Charges, so it is suggested that a reporting form such as the one included in the Appendix A-5 be used.

Try to keep the report as positive as possible while at the same time remaining honest and saying what needs to be said. Be careful how you word any recommendations. An offended congregation is not very open to hearing feedback or making changes. Too many recommendations imply failure. You may not have any, but a few brief, clear recommendations may be helpful in supporting the ministry of the Pastoral Charge.

Under no circumstances is it appropriate for an oversight report to include a recommendation requiring ministry personnel to undertake a directed program or remedial training. If it is the opinion of the visiting team that such action may be necessary, a recommendation that the Pastoral Relations Committee become involved should be made.

Opinions should be identified as such and not stated as facts. A few examples may be included in the report for clarification, as long as if they are factual and representative. It may be appropriate for some information the visiting team receives to be referred to the Pastoral Charge’s Ministry and Personnel Committee rather than included in the written report.

The member of the visiting team designated to write the Visitation Report sends a draft copy of the report, clearly marked “Draft”, to each the following:

- the members of the visiting team.
- each ministry personnel
- the chairperson of the Official Board/Council of the Pastoral Charge.

Each person receiving the draft report is asked to read the report and indicate if there are comments that need clarification or more explanation, if there are significant omissions, if there are spelling or typographical errors. ***It is not appropriate for those reading the draft to challenge the observations or recommendations of the visiting team.***

Each person receiving the draft report returns their comments to the member of the visiting team designated to write the Visitation Report, who prepares the final Report of the Visitation, and sends the final report to the convenor of the Presbytery Oversight Committee (or equivalent).

The Pastoral Oversight Committee is authorized, at their discretion and if requested, to disclose information to: the Presbytery Pastoral Relations Committee, appropriate Presbytery or Conference staff who services are required in addressing recommendations, or future visiting teams. This information is to be treated with confidentiality and respect.

**With the submission of the final report, the team's task is finished.
The Pastoral Oversight Committee gratefully appreciates the work of
the visiting teams.**

Greetings!

As a Presbytery of The United Church of Canada we are called to offer support, encouragement, resources and counsel to the Pastoral Charges within our bounds.

This ministry of the Presbytery is considered to be so vital to the health and well-being our Pastoral Charges that *The Manual of The United Church of Canada* requires all Presbyteries to visit each Pastoral Charge every three years.

This letter is to confirm arrangements for our visit to your Pastoral Charge.

Our team will consist of _____ **names of members of the visiting team** _____.

The following meetings have been arranged:

Time	Length of meeting	Person or Group	Meeting Place
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We believe it is important to involve the whole Pastoral Charge in this opportunity, and so, in preparation for our visit, we ask that the following:

- The visit and its purpose, including time and place, be announced to the congregation(s) in the worship bulletin for at least two Sundays before the visit. A suggested announcement is attached.
- The Pre-Visitation Data Sheet (attached) be completed as thoroughly as possible and returned to the visiting team at the address below.
- a copy of the latest Annual Report
- the mission statement and constitution
- copies of Pastoral Charge policies and procedures
- a summary sheet of financial statistics, including Mission and Service Fund information
- copies of position descriptions for all staff and ministry personnel

We look forward to spending this time together as the Pastoral Charge reflects upon its life and work. Upon completion of the visit a written report of the visiting team will be sent to the Official Board/Council.

Sincerely,

Name and Address of the Visiting Team Leader

Visiting Team Leader

The following responses may be used to create a bulletin insert in preparation for the Presbytery Oversight visit.

What is a Presbytery Oversight Visit?

Oversight visits are part of the Presbytery's ministry to the Pastoral Charges within its bounds. It is the Presbytery's responsibility to keep in touch with all Pastoral Charges, supporting in times of struggle and celebrating and encouraging achievements. The United Church of Canada is set up so that there is support and encouragement for all Pastoral Charges and all ministry personnel in its care. One way this is done is through regular Presbytery Oversight Visits.

How often are we visited?

Usually a visit is made one year after a new minister is called or settled to a Pastoral Charge, and then, every three years thereafter.

When will the visit take place?

Date and time of the visit

Who will make the visit?

Names of the visitors and Pastoral Charges from which they come

Who participates in the visit?

All members of the Official Board/Council of the Pastoral Charge are asked to attend. All other members and adherents of the Pastoral Charge are encouraged to attend so that there will be a wide variety of people, both newcomers and long-timers.

The visiting team will have met with the ministry personnel and church staff earlier in the day. The ministry personnel may come to the opening of the meeting with the people of the Pastoral Charge, but will be excused at the beginning of the discussion. As a courtesy, the visiting team will speak to the ministry personnel immediately following the meeting.

What will be discussed at the meeting?

The discussion at the meeting will cover a wide range of topics including worship, sacraments, Christian development, leadership, church organization, resources, mission and outreach, stewardship and future planning. This is a time for celebrating the achievements, airing the frustrations, exploring the challenges and reaffirming our faith and the pastoral relationship with our ministry personnel.

What will be the format of the discussion?

Usually the visiting team comes with a suggested format. It may involve conversation in small groups or together as a whole, or a combination. The visiting team will lead the discussion and will have questions prepared. There is also room for some flexibility in the conversation. Everyone will be invited and encouraged to offer their views.

What will the result of the visit be?

A report of what they heard and observed will be compiled by the visiting team. Copies of the report will be sent to the Presbytery Oversight Committee. The committee will review the report, and any recommendations it makes to the appropriate committees for follow-up. The Presbytery Oversight Committee will then send copies to the Official Board/Council of the Pastoral Charge, the ministry personnel and the Presbytery.

Any recommendations which require the attention of the Pastoral Charge will be indicated in the report, and after a reasonable period of time, the appropriate Presbytery committee will check with the Pastoral Charge to see what progress is being made, and if there is a need for further support or resources.

The report is useful to the Pastoral Charge as an objective review of our life together. It is like a mirror held up so the people of the Pastoral Charge can take a good look at their life and work, celebrating what is going well and making plans to improve areas where work is less effective.

Do you still have questions?

Names and contact information for those who are able to provide information about the Presbytery Oversight Visit.

Pastoral Charge _____

Person completing the form _____

Position in this church _____

Date _____

In order to begin the process and use time during the actual visit most efficiently, the Pastoral Charge is requested to answer the following questions and return this form to the leader of the visiting team. Please answer or comment in the space under the question.

1. Does the Secretary of the Official Board have the most recent edition of the handbook *Archives and Recordkeeping: A How-to Guide for Congregations and Conferences*? Yes No
2. Does the congregation provide a manse or a housing allowance ?
3. If a manse, what provision is made for upkeep, repairs, and required furnishings?
4. What responsibility does the minister's family assume for the care of the manse?
5. If a housing allowance, what amount? \$_____ per month year
6. Is the allowance in accordance with that set by *The Manual of the United Church of Canada* (namely, fair market value for the local area)? Yes No
When was it last reviewed?
7. If the Pastoral Charge still owns a manse, what are the long range plans for its use?
8. Does the Pastoral Charge treasurer have a copy of the most recent edition of the *Financial Handbook for Congregations*? Yes No
9. By what means does the Pastoral Charge handle financial matters? (check as many as apply)
Committee of Stewards Finance committee
Use of annual pledges Use of Envelopes
Pre-Authorized Remittance Other: please specify _____

10. Are financial needs of the Pastoral Charge being adequately met? Yes No
11. Does the Pastoral Charge visit members and adherents encouraging financial or other support? Yes No How often?
12. Are the ministry personnel paid at or above the minimum according to the Schedule of Salary and Allowances of The United Church of Canada? Minimum Above minimum If above, please provide details.
13. What amount of Financial Support for Study do the ministry personnel receive?
14. Does the Pastoral Charge provide secretarial help for the ministry personnel? Yes No How many hours per week?
15. If salary is paid to a church Administrator, how do the salaries compare with wages paid for similar employment in the community?
16. Is there other staff (caretakers, musicians etc.)? For each position, please indicate if compensation is provided, and if so, how the salaries compare with wages paid for similar employment in the community.
17. Are all church staff employed 14 hours or more enrolled in the United Church Pension and Group Insurance program, as required? Yes No
18. Are there any expenses for which any church staff, including ministry personnel, are not reimbursed? (travel, telephone, postage, supplies etc)? Yes No If no, please provide details.
19. Does the treasurer have a fixed date on which to issue salary cheques? Yes No
Are they always delivered on time? Yes No
Have any salary cheques been returned because of non-sufficient funds? Yes No

20. Are contributions to the *Mission and Service Fund* forwarded to the General Council Office monthly? Yes No If no, please explain.
21. Has a Level 2 Police Record Check been obtained by each ministry personnel in the Pastoral Charge and shown to a member of the Ministry and Personnel Committee? Yes No
22. Is there a record of that in the Personnel File (*Form MEPS 460 PC*)? Yes No
23. Are the names and addresses of all the trustees of the Pastoral Charge kept on file? Yes No
Where?
24. Are they all active, resident members or adherents of the congregation?
Yes No
Are a majority of trustees full members of the Pastoral Charge?
Yes No
25. Where is the *Duplicate Certificate of Title* (i.e. the “deed”) for the church property filed?
26. What is the amount of insurance carried upon the buildings and possessions of your Pastoral Charge?
27. How does this compare with the replacement value?
28. What is the amount of Public Liability Insurance carried by the Pastoral Charge in case of injury to another party while at the church or while participating in an event organized by a church group?

Thank you!

Please return this information to:

Name and Address of visiting team leader

Appendix 4 Report of the Presbytery Oversight Visit

Pastoral Charge: _____

Date of Presbytery Oversight Visit: _____

Visiting Team Members: _____

Introduction: General comments (appreciations, names of key participants, outline of visit, format used etc.)

Life Of The Pastoral Charge

Role and Support Of Ministry Personnel

Role and Support of the Laity

Stewardship

Relation to the Larger Church

Other Comments

Recommendations

Signature of Writer _____

cc: Chair of Pastoral Oversight Committee
Chairperson of the Official Board/Council of the name Pastoral Charge

Appendix 5 **Presbytery Oversight Visit Evaluation Form**

Pastoral Charge _____

Date of Presbytery Oversight Visit _____

This form is to be completed by the Official Board/Council of the Pastoral Charge as soon as possible after receiving the written report from the visiting team. Feel free to use more space than is provided.

1. How did you feel about the visit in general?

2. How do you feel about the written report?

3. What discoveries or insights did you gain about the Pastoral Charge as a result of this visit?

4. What concerns (if any) about your Pastoral Charge were brought into clearer focus or shared in a positive manner?

5. What feedback do you have for the visiting team regarding what was helpful and unhelpful?

6. Do you have any recommendations for future visiting teams?

7. How might Presbytery be more helpful to your congregation?

8. Please add other comments.

Signed _____

Please send this form to the Convenor of the Presbytery Pastoral Oversight Committee:
Name and Address of Convenor

Appendix 6a

Current Contact Information

The following are the current names with contact information of those people to whom a copy of the Visitation Report is sent (in addition to the ministry personnel and Official Board of the Pastoral Charge).

Convenor of the Presbytery Oversight Committee:

Name: _____

Address: _____

Phone Number and Email Address: _____

Secretary of Presbytery:

Name: _____

Address: _____

Phone Number and Email Address: _____

Appendix 6b

Useful Internet Resources

Archives and Recordkeeping: A How-to Guide for Congregations and Conferences

<http://www.united-church.ca/archives/resources/>

Financial Handbook for Congregations

<http://www.united-church.ca/mtf/handbooks.shtm>

Handbook for Ministry and Personnel Committees

<http://www.united-church.ca/pastoralrelations/>

This handbook *Suggested Guidelines for Presbytery Oversight Visits to Pastoral Charges* is a living document of Alberta and Northwest Conference, and will be updated from time to time. Your use of this document and feedback about it are vital to providing a high quality resource for the use of Presbytery Oversight Committees. Please take a few minutes to complete this form and return it to:

Earl J. Reaburn, Personnel Minister
Alberta and Northwest Conference
The United Church of Canada
9911 – 48 Avenue
Edmonton AB T6E 5V6
fax: (780) 438 – 3317

Thank you!

1. Did you find this resource “user friendly”? Yes Parts of it No

2. What was particularly helpful about this document?

3. What was not helpful? Why? How could it be changed?

4. Did you modify any part of this process? If so, how? What were your results?

5. For our information, please tell us about the Pastoral Charge in which this resource was used:

Rural Suburban Urban Other (please specify) _____

How many points are on the Pastoral Charge? _____

In which Presbytery is the Pastoral Charge? _____

6. What other comments or suggestions would you like to offer?