

SYNODE MONTREAL AND OTTAWA CONFERENCE



**“EFFECTIVE LEADERSHIP AND HEALTHY PASTORAL RELATIONSHIPS”
PILOT PROJECT**

**PASTORAL CARE AND OVERSIGHT COMMITTEE
TOOL KIT**

FEBRUARY 2014



GUIDELINES FOR PASTORAL CARE AND OVERSIGHT VISITS

- (A) Every ministry site is to have a PC&O visit at least once in three years UCC Manual 2013 sec. J 1.1.2 and written reports of the visits are to be received by the Conference office by April 15 of any given year. (A page on Report writing is included in the Tool).
- (B) Visits need to be held with:
- (1) Ministry personnel,
 - (2) Ministry and Personnel Committee, and
 - (3) Congregation or board of a ministry site
- (C) The same tool will be used in all five presbyteries for conducting visits. It includes letters of introduction, questionnaires to be addressed to the three groupings, questions for team ministries where applicable, reporting forms, guidelines for reviewing Archival documents and other materials deemed useful. A copy of the Annual Report should be an accompanying document.
- (D) Schedules for visits will be determined by each presbytery with flexibility to accommodate for geographic and linguistic challenges. Some Presbyteries may wish to continue their existing practice of dividing the sites into 1/3 to be visited each year, thus completing the entire Presbytery in a three year cycle. Different models may work for different presbyteries and the Conference staff will work to train regional teams of visitors to meet the local needs. A new model being offered is to designate a Sunday for a pulpit exchange across much of the presbytery, with the visiting minister and accompanying laity conducting the congregational part (3) of the visit following morning worship and a meeting with the M&P. This would involve preparing a list of the presbytery assigning a specific congregation to the minister and lay team from another specified pastoral charge. For pastoral charges with more than one worship time, consultation will be needed with the leadership to determine whether it is feasible to have one combined worship service. That would be most desirable to expedite conversation, but is not always possible. Visits conducted this way will require that the visiting team will have to arrange for another time to complete the visits with all ministry personnel.
- (E) The visitors are to gather information in response to the proposed questions but are not to problem solve or mediate on any issues. They will be entrusted with sensitive information which will need to be reported in such a way that it protects all parties. The United Church is keenly aware that we must adhere to the federal guidelines regarding privacy and transmitting sensitive issues. Therefore when the visits are completed, the visitors will give a report including any sensitive information to the Pastoral Care and Oversight chair, the Pastoral Relations chair, and the appropriate Conference Personnel Minister. They have the responsibility of following up on an areas flagged for concerns or needing support.
- (F) A "thank you" letter and summary of the visit and any recommendations from the report are to be sent to the ministry site as well as the minister/s and staff.
- (G) All Reporting information should be shared by paper and not emails. All copies of reports circulated at meetings of the Pastoral Care and Oversight Committee, the Pastoral Relations Committee or Presbytery executive must be collected at the end of the meeting, thus avoiding any error in distribution.

PRESBYTERY LETTERHEAD

Date

Address of the ministry site or Mission Unit

Attention: (name of board chair)

Dear _____

We are writing on behalf of the Presbyteries Pastoral Care and Support committee to advise you that in our efforts to visit all congregations and Mission units in the Presbytery, in accordance with section J 1.2 of the Manual 2013, your ministry site/mission unit is on the list for a visit.

This visit involves private sessions with the visiting team and each of the Ministerial and support staff. It also involves a session with the congregation, as well as a separate session with the Ministry and Personnel committee. You will find enclosed as series of Questions prepared for each group, Minister and staff, congregation as well as the Ministry and Personnel committee. Please give these questions to the appropriate bodies. This is to expedite the visiting process so that there are no surprises. It would be helpful that as many people as possible within the ministry site have the congregational questions before hand, providing time to formulate their responses.

This is intended to be a supportive visit to ministry sites and mission units as well as those who provide pastoral care and leadership. Please note: some or all of the information may be shared with the presbytery Pastoral Relations Committee as well as the Conference Personnel Minister.

We would appreciate your attention in this matter at your earliest convenience. The visiting team leader will be in contact with you in the very near future to discuss your suggestions of dates that will be most expedient for all. Thank you for your cooperation.

Sincerely,

**MONTREAL AND OTTAWA CONFERENCE PASTORAL CARE AND OVERSIGHT
VISITATION REPORTING FORM. PRESBYTERY: _____**

Name of Ministry Site: _____ Number of Points: _____

Please make a separate sheet for each point on the Pastoral Charge

	Ministry Personnel Serving	E-mail or postal address for reports	Year of Call / Appointment
1			
2			
3.			
4.			

Other Staff Positions

	Name	Salaried	Honorarium	Volunteer	Pension Plan
Organist		yes / no	yes / no	yes / no	yes / no
Choir Dir.		yes / no	yes / no	yes / no	yes / no
Sec./Admin.	1.	yes / no	yes / no	yes / no	yes / no
Sec./Admin.	2.	yes / no	yes / no	yes / no	yes / no
Custodian		yes / no	yes / no	yes / no	yes / no

Chair of Church Board / Council:

E-Mail or Postal address:

Chair of Ministry and Personnel Cte.:

Email or Postal Address: _____

Form of Church Governance: *Official Board / Church Board / Church Council*

Other: _____ (if 'bther," date it was approved by Presbytery: _____)

Have you inspected all pertinent records? (See Archives document) Y / N

Date of last year end statistical filing:

Date of last Presbytery visitation: _____ Date of this visit:

Number of congregants participating in visitation meeting:

Context of this visit:

- Regularly scheduled Board/Council Meeting
- Special called Board/Council Meeting
- Other (please specify)

Names of Presbytery visitation committee members and emails or contact information.

Visit co-ordinator	
Visitor/ recorder	
Visitor	

Pastoral Care and Oversight Committee Questions for Ministry Personnel

Presbytery:

Ministry Unit:

1. How would you describe the current overall health of your pastoral charge?
2. What excites you about working here?
3. What challenges you about working here?
4. How would you describe your relationship with the pastoral charge generally?
 - i. Do you feel supported in your ministry here?
 - ii. Have you created a support system for yourself?
5. How do you feel about your ministry in relation to the congregation's mission and vision statements?
6. Describe your relationship with the Ministry and Personnel Committee, including the process and frequency of reviews of your ministry. Does the M&P committee have a copy of your Vulnerable Sector level 2 Police Check? Y / N When was it last done? _____ Have you taken the Racial Justice training? Y / N Have you taken the Sexual Abuse Awareness training? Y / N
7. Describe any concerns regarding your call to this pastoral charge? (i.e., salary, working conditions, housing allowance, continuing education, book allowance, manse or other benefits.)
8. Describe your relationship with other staff members (if relevant).
9. In what ways do you nurture and take care of yourself?
10. In what ways do you challenge yourself to grow spiritually?
11. Are there joys or concerns in this interview that you would like passed on to the congregation when we speak with them?
12. What are your near future plans for continuing education?
13. Do you plan to have a “Sabbatical” in the next few years? If yes, what would you do?

Pastoral Care and Oversight Committee Questions
For the Ministry Site's Ministry and Personnel Committee

Ministry Site: _____

Presbytery: _____

Date of Visit: _____

1. How often do you meet with the staff?
2. Do you give a report to the Board or Council?
3. Do you have a contract with all non-ministry staff?
4. Are these contracts reviewed and kept up to date?
5. Has your ministry leadership provided you with a Police Records Check? How Current is it? Date: _day_/_month_/_year_.
6. Has your ministry leadership taken the mandatory Racial Justice workshop?
7. Has your ministry leadership taken the mandatory Sexual Abuse Awareness workshop?
8. Do you encourage your ministry leadership to take their continuing education?
9. Have you talked about the ministry leadership's sabbatical?
10. How do you encourage your ministry leadership and staff in self-care?
11. How do you encourage your ministry leadership to fulfil their responsibility to the wider United Church, Presbytery, Conference, General Council?
12. Do you feel that your ministry leadership and staff are satisfied with their working environment? (Salary, equipment, housing allowance/Manse)? Would you say they feel supported in their work?
13. How do you maintain confidentiality?
14. How can the Presbytery and Conference be a support to you in your work, such as workshops, etc.?

Pastoral Care and Oversight Committee Questions for Ministry Site

Presbytery:

Ministry Site: -

Date of visit:

1. Think about your church's life over the past three years. Please tell us about some of the good memories from that time.
2. Over that same time period, are there any frustrating events which occurred that you would like to share with us?
3. What do you see as being your church's challenges in the next few years?
4. Tell us about the worship life of your ministry site (eg. services, special services). Do you follow the common lectionary? Do you use Voices United and More Voices in your worship experience, any other resources? Who is involved in the worship planning? How often do you celebrate Holy Communion? Does this meet your needs? Do you have a Baptismal policy? Who decides? Is there preparation for parents / guardians of those to be Baptized? How are people prepared for Confirmation? Do you have a marriage policy? Who decides? What preparation is offered to couples? What special services have been held this past year?
5. Caring for each other is part of our Christian mission. How does pastoral care happen in your congregation?
6. Tell us about your Christian Education programs (children, youth, adults).
7. Church Governance:
 - i. What kind of governance structure is in place in your pastoral charge (Council, Official Board, Unified Board)?
 - ii. If it has been changed in recent years, has it been approved by Presbytery?
 - iii. Are there any difficulties with it?
8. Does your pastoral charge have a mission and/or vision statement?
 - i. Is it visible (i.e., in the bulletin, up on a wall)?
 - ii. Is it still appropriate for your ministry site today?
 - iii. Do you review it on a regular basis?
9. How are the goals and priorities set for your pastoral charge?
 - i. Do you have the resources to achieve them?

- ii. Are they still appropriate to who your congregation is today?
10. Ministry and Personnel Committee:
- i. How often does the Ministry and Personnel Committee meet?
 - ii. Does the Ministry and Personnel Committee report to the Council/Board?
 - iii. How is pastoral care offered to the minister/leadership?
11. Tell us about communications within your ministry site?. How do you keep informed? (i.e., newsletters, bulletin, committee news)
12. In what ways does your congregation reach out to the community?
13. Your Minister(s) attends Presbytery. You also have Presbytery delegates.
- i. In what ways do they fulfil their responsibilities to the wider church (committee work, leadership, attending Presbytery meetings, Conference work)?
 - ii. How are you kept informed of the work of the wider church (Presbytery, Conference, General Council, Mission and Service Fund, etc.)?
 - iii. Tell us about your relationship to Mission and Service. Is there an annual Stewardship or Financial campaign? If not, when was the last campaign?
 - iv. How do you view your participation in supporting the work of the wider church in Canada and elsewhere?
 - v. Are there ways in which Presbytery can support your ministry site (workshops, courses, information)?
 - vi. Is there any help you need from Presbytery right now?
 - vii. Do you have a manse or housing allowance? Are both kept up to date?
14. Faithful Footsteps:
- i. Has the Board/Council done a risk assessment process with respect to the church and its ministries?
 - ii. Is your church insurance adequate?
 - iii. Is your church fully accessible and inclusive?
15. If you are part of a multi-point charge, what is the relationship between the congregations?
16. How do you resolve any conflict or in the past, how have you dealt with conflict?
17. How is your financial Health?
18. Are you up to date with your Presbytery Assessment?
19. Is your Joint Needs Assessment Process up to date?
20. Do you have any ministry in French?

21. Can the Presbytery and Conference be a support to you in your ministry, such as offering workshops, specific training, etc.?
22. Is there anything else you would like to share with us?

Team Ministry Questions

Visit to: _____ Date: _____

Minister: _____ Minister: _____

1. How would you describe the current overall health of your pastoral charge?
2. What excites you about working here?
3. What challenges you about working here?
4. How would you describe your relationship with the pastoral charge generally?
Do you feel supported in your ministry here?
Have you created a support system for yourself?
Describe your relationship with the Ministry and Personnel Committee, including the process and frequency of reviews of your ministry. Do the M&P committee have a copy of your level 2 Vulnerable Sector Police Check? When was it last done?
5. How do you feel about your ministry in relation to the congregation's mission and vision statements?
6. Describe any concerns regarding your call to this pastoral charge? (eg. Salary, working conditions, housing allowance, continuing education, book allowance, manse or other benefits.)
7. What are the basic duties of each minister?
What are the joys and challenges in the working relationship?
What are the conflict areas, if any?
Describe your relationship with other staff members.
8. How often do you meet together, and describe the nature and format of such meetings? Do you meet with other staff members also, on a regular basis?
9. How clear do you think the congregation is about the roles and responsibilities each of you carries?
10. Do you feel supported in your ministry here? What are your sources of support? In what ways you nurture and take care of yourself? What are the ways you nurture and challenge yourselves to grow spiritually?
11. Are there joys or concerns in this interview that you would like passed on to the congregation when we speak with them?

PASTORAL CARE AND OVERSIGHT VISIT REPORT

WRITING THE REPORT

Ministry Site: _____

Presbytery: _____

Date of Visit: _____

Please complete your written report as soon as possible after your visit. This avoids losing any vital information or tone of the meeting. (**Within one month**)

Try to keep your report as positive as possible, however it needs to be honest and saying what needs to be said.

Be sensitive in how you word any recommendations or suggestions; remember recommendations are stronger than suggestions. Let's be truthful but also remember that an offended congregation may not be very open to hearing feedback or making changes.

Please make sure that recommendations for action by either the presbytery or the ministry site are specific. Be clear who is responsible to fulfill the recommendations. It is the Presbytery who must hold the ministry accountable with follow-up.

There may be sensitive or confidential information which you should know about but which may not be helpful to include in the report to the congregation. Therefore, attach a separate sheet with this information only to the presbytery pastoral relations committee for any follow up. Use your own careful judgement in this matter.

Opinions should be stated as such and not facts.

Copies of the report should go the following people:

- 1, The minister or ministers of the ministry site, this may include D.L.M.
- 2, The Church board or council of the ministry site.
- 3, The Chairperson of the Presbytery Pastoral Care and oversight Committee.
- 4, The Chairperson of the Presbytery Pastoral Relations Committee.
- 5, The Montreal and Ottawa Conference Office east or west.

Thank you for your careful and sensitive attention to this very important matter.

Signed: _____