



# **CALLED** *to* **COVENANT**

Strengthening Congregation-Presbytery Relationships

# **RESOURCE BOOK**

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## **RESOURCES**

The Presbyterian Church in Canada

**Called to Covenant**  
Strengthening Congregation-Presbytery Relationships

A resource produced by the Life and Mission Agency

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# Resources

The resources are presented according to the chapter in which they are mentioned. Resources mentioned in other chapters may also be helpful for particular situations. There are no specific resources for Chapter One.

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- Measuring Tool for Ministries Receiving or Applying for Grants from Canada Ministries 18
- Presbytery Visitations to Congregations — Presbytery of Calgary-Macleod 24
- “Tools for Presbytery and Congregations in Discerning Health”, excerpted from Report of the Task Force on Congregational Viability — Presbytery of Hamilton 31
- Worshipful Work 34

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# **PRIMARY RESOURCES** *for Chapter 2*

# Guidelines for Presbytery Visitation

(as at 3/98) Presbytery of Pickering

## Function

One of the most important functions of the presbytery is the exercise of pastoral care over the congregations within its bounds. In the Presbyterian system, this is not entrusted to an individual bishop, but is exercised corporately by the presbytery. In this system, the minister is not a member of the congregation he/she serves. As a member of the presbytery, the minister comes under the oversight and discipline of the court. This holds true for all pastoral/educational staff as well.

A presbytery visitation is an honest and constructive pastoral discussion with a view to the renewal and building up of the whole people of God in the local situation. The aim is to establish and maintain a relationship of supportive concern between the presbytery and the congregations, including clergy and church workers.

## Principle

The congregations should be visited on a regular systematic basis so that each is visited every three years. Some flexibility is needed during vacancies and recently started positions.

## Steps in the Visitation Process

### 1. Team

Teams will include two clergy and two elders (not necessarily members of the presbytery), appointed by the Visitation Committee of the presbytery. Ideally, each of the four would be from different presbytery committees. The chairperson of the visiting group will contact the congregation being visited to establish a suitable time for the visit. This needs to be done two months in advance.

### 2. Questionnaire

At this time, the questionnaires for the minister, elders, board, trustees, and congregational groups are to be sent to the church with the request that they be filled in and returned to the chairperson within one month. *Churches being visited should be instructed to mail the questionnaires for the congregation to all members and adherents.*

### 3. Preparation for visit

The visitation team would then meet, analyze the responses, and prepare for the actual visit. Along with these questionnaires, the congregation will be asked to send along the last year's annual report as well as a brief outline of the structure and organization of the congregation and a listing of the organizations that are part of the education program, including the purpose of each group. The Clerk of Session would be responsible for gathering this information and forwarding it to the visiting team chairperson.

### 4. Outline for a visit

Here is a brief outline for a visit:

- a. 45 minutes with the minister
- b. 45 minutes with the elders (minister(s) not present)
- c. 45 minutes with the board/finance committee and trustees
- d. 45 minutes with the Christian education representatives
- e. 45 minutes with the congregation itself, including groups not already heard from.

To facilitate this time frame, it is strongly suggested that the visit take place on a Saturday or Sunday afternoon. Perhaps the visited congregation might end the

visit with pot-luck supper. If this is not possible, an evening might begin over dinner with the minister(s).

### 5. Follow Up

Within one week of the visitation, the team shall meet, compare notes, and prepare a report in the form in which it should be presented to presbytery. The convener of the visitation team will submit this report to the Presbytery Visitation Committee who, after its examination and review, will forward it to the Presbytery Clerk. Where necessary, specific recommendations should be included.

*Normally, the length of this report would be one page.*

The Presbytery Clerk will send a copy of the report to the minister and representative elder two weeks prior to the presbytery meeting in which the visitation report will be received. The minister and/or representative elder, through the Visitation Committee, may ask for clarification prior to the presbytery meeting.

The convener of the visitation team and/or alternate should be present at the presbytery meeting in which the report is presented.

Copies of the report as approved by presbytery shall be sent by the Presbytery Clerk to the minister, representative elder, Session Clerk, and Board/Finance Chairperson.

The minister of the visited church shall report back to the Visitation Committee within six months on what action has been taken on any of the recommendations approved by the presbytery.

Only the report as approved by presbytery shall be kept on file. The Clerk will make it available to the next visitation team. Follow-up when completed should be added to the file.

### Notes

1. The next seven pages make up the questionnaires to be filled out by the minister, elders, board/finance, and members of the congregation. These are collected and forwarded to the visitation team chair one month before the visit. Again, please ask the congregation to mail the members' forms to their people.
2. The next three pages make up the body of the meeting held with minister, elders, and board/finance. Questions can be selected and changed dependent on the survey questions returned by the congregation at the meeting of the visiting team before the visit actually takes place. The intent is to ask open-ended questions that allow as many people as possible to express themselves. Questions like "What are you excited about in the life and work of this church?" can even be asked with the idea of going around the room and asking each person to respond.

## TO BE ANSWERED BY THE MINISTER(S)

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

**Respond to each of the following by a number as indicated.  
Try to be as accurate as possible.**

1. I view my role in session as part of a team. \_\_\_\_\_
2. The elders feel they are part of a team. \_\_\_\_\_
3. I encourage discussion on session matters and try to reach a consensus. \_\_\_\_\_
4. The session is interested in the work of the church at large. \_\_\_\_\_
5. I am satisfied with my relationship with the elders. \_\_\_\_\_
6. I ensure new families are welcomed and contacted. \_\_\_\_\_
7. I regularly visit the sick and shut-ins and others in need. \_\_\_\_\_
8. I take communion to the sick and shut-in. \_\_\_\_\_
9. The elders keep me informed of the needs in their areas. \_\_\_\_\_
10. I ensure that communicant classes for both adults and youth are held. \_\_\_\_\_
11. I hold to the *Book of Forms* and baptize children only in cases where at least one parent is a member. \_\_\_\_\_
12. I offer guidance/give leadership in the congregation's involvement in an organized evangelism program. \_\_\_\_\_
13. I feel challenged by the possibilities of this congregation. \_\_\_\_\_
14. I have difficulty finding enough to do in the congregation. \_\_\_\_\_
15. I have a problem organizing my time. \_\_\_\_\_
16. I have difficulty finding enough time to do all the work I should be doing In the parish. \_\_\_\_\_
17. I organize my congregational visiting. \_\_\_\_\_

**TO BE ANSWERED BY THE MINISTER(S)** *(continued)*

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

- 18. I have difficulty in managing my time around \_\_\_\_\_  
 a) taking at least a day off/family time  
 b) congregational visiting  
 c) devotional life
  
- 19. The session is satisfied with my congregational visiting. \_\_\_\_\_
  
- 20. I see the worship service as important and spend considerable time in preparation. \_\_\_\_\_
  
- 21. I am satisfied with the feedback I get from worship leadership. \_\_\_\_\_
  
- 22. I am diligent in attending the courts of the church. \_\_\_\_\_
  
- 23. I appreciate the supportive concern of the presbytery. \_\_\_\_\_
  
- 24. I experience frustration in my work. \_\_\_\_\_
  
- 25. I try to keep up-to-date in my profession through courses and personal reading. \_\_\_\_\_
  
- 26. I think of leaving the pastoral ministry. \_\_\_\_\_
  
- 27. There are people I can confide in outside the congregation and my family. \_\_\_\_\_
  
- 28. The people of the congregation extend friendly invitations to myself and my family. \_\_\_\_\_
  
- 29. The board/finance committee is responsive to the needs for maintenance and upkeep of the manse. \_\_\_\_\_
  
- 30. My wife/husband and family feel restricted by the demands placed upon us by the congregation. \_\_\_\_\_
  
- 31. I have a good relationship with the organist and the choir. \_\_\_\_\_
  
- 32. The music assists me to conduct worship is a meaningful way. \_\_\_\_\_
  
- 33. I feel good about being a part of this congregation. \_\_\_\_\_

## TO BE ANSWERED BY EACH ELDER

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

**Respond to each of the following by a number as indicated.  
Try to be as accurate as possible and do not sign this survey.**

1. I view my role in session as part of a team. \_\_\_\_\_
2. I feel that I am part of the decision making process of session. \_\_\_\_\_
3. I support the decisions which the session makes. \_\_\_\_\_
4. The session meetings are worthwhile and we get things done. \_\_\_\_\_
5. I support the minister(s) even though we sometimes disagree. \_\_\_\_\_
6. I have a good relationship with the minister. \_\_\_\_\_
7. a) The session has a policy of recruiting laity to share in the ministry of the church. \_\_\_\_\_  
 b) The session involves non-session members in planning and decision-making. \_\_\_\_\_
8. Our congregation does a good job of welcoming and integrating new members and adherents into its life and work by giving them responsibilities and inviting them to join groups. \_\_\_\_\_
9. Our congregation ministers well to those who are sick and shut in. \_\_\_\_\_
10. Our congregation tries to integrate young people into its life and mission. \_\_\_\_\_
11. As an elder, I keep the minister(s) informed of the needs, problems and concerns of the members assigned to my care. \_\_\_\_\_
12. Our session sees that membership classes are regularly offered. \_\_\_\_\_
13. I am satisfied with the level of the minister(s)' pastoral care. \_\_\_\_\_
14. God speaks to me through the sermons, challenging me to faith and action. \_\_\_\_\_
15. Workshops and training events are scheduled to equip elders to carry out Christ's ministry in their work, homes and the world. \_\_\_\_\_

**TO BE ANSWERED BY EACH ELDER** *(continued)*

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

- 16. The minister(s) moderate(s) the session meetings capably. \_\_\_\_\_
- 17. I try to respond to challenges and opportunities to share my faith. \_\_\_\_\_
- 18. I invite friends, neighbors and acquaintances to attend worship. \_\_\_\_\_
- 19. We have a personnel committee to discuss salaries with minister(s), organist, choir director and any office staff before setting the annual budget. \_\_\_\_\_
- 20. I feel trained and equipped for visiting. \_\_\_\_\_
- 21. Our session has arranged for personal contact to be made with visitors at worship including the securing of their names and introduction to the minister. \_\_\_\_\_
- 22. We try to arrange intergenerational social events which include as many of the congregation as possible. \_\_\_\_\_
- 23. I am satisfied with the music at our worship. \_\_\_\_\_
- 24. There is a good working relationship among the minister, organist, choir leader and choir. \_\_\_\_\_
- 25. Children of the congregation are welcomed to the Lord’s Supper. \_\_\_\_\_
- 26. The session and board/finance committee know their respective responsibilities and work harmoniously. \_\_\_\_\_
- 27. I feel good about “my church”. \_\_\_\_\_
- 28. The session promotes the General Assembly’s programs and Presbyterians Sharing. \_\_\_\_\_
- 29. Our congregation has a statement of purpose and mission and work towards fulfilling it. \_\_\_\_\_
- 30. We have a program of educating the congregation in stewardship. \_\_\_\_\_

Additional comments may be made below

**FOR COMPLETION BY ALL MEMBERS OF THE BOARD OF MANAGERS  
OR FINANCE & MAINTENANCE COMMITTEE**

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

**Respond to each of the following by a number as indicated.  
Try to be as accurate as possible and do not sign this survey.**

**Part I**

1. I feel my work on the board or finance and maintenance committee is worthwhile. \_\_\_\_\_
2. I feel a part of decision-making. \_\_\_\_\_
3. We hold regular monthly meetings. \_\_\_\_\_
4. Our meetings are opened and closed with prayer, asking God’s guidance in the work we undertake. \_\_\_\_\_
5. We have a secretary who records minutes of all meetings and cares for all necessary documents and papers. \_\_\_\_\_
6. Board members have and understand individual responsibilities. \_\_\_\_\_
7. I feel adequately trained and equipped to deal with my responsibilities. \_\_\_\_\_
8. We have joint meetings with session. \_\_\_\_\_
9. We feel the session and board know their respective responsibilities and work at them harmoniously. \_\_\_\_\_
10. We have the session represented in our membership. \_\_\_\_\_
11. We look to the session for guidance with regard to releasing funds for special ministries. \_\_\_\_\_
12. In our meetings we avoid discussing personalities and the short-comings of the leaders of the congregation. \_\_\_\_\_
13. The minister(s) is welcome to attend our meetings. \_\_\_\_\_
14. The minister attends our meetings. \_\_\_\_\_
15. We make financial provision for the minister’s study leave. \_\_\_\_\_
16. I support the minister(s) even though we sometimes disagree. \_\_\_\_\_

**FOR COMPLETION BY ALL MEMBERS OF THE BOARD OF MANAGERS  
OR FINANCE & MAINTENANCE COMMITTEE** *(continued)*

1 Always	2 Usually	3 Occasionally	4 Seldom	5 Never	6 Do Not Know
-------------	--------------	-------------------	-------------	------------	------------------

- 17. A budget committee made up of elders and managers meets prior to the preparation of the budget, to determine the salary needs of the minister(s) and other paid staff and to create a congregational budget. \_\_\_\_\_
- 18. The board reports the financial situation to the congregation monthly. \_\_\_\_\_
- 19. I see my work on the board as a ministry, using my talents and gifts for God. \_\_\_\_\_
- 20. I feel the board’s contributions are appreciated by the congregation. \_\_\_\_\_
- 21. The income of the congregation reflects its giving potential. \_\_\_\_\_
- 22. All offerings and collections are counted by at least two responsible members or adherents before being removed from the church and deposited into the church account. \_\_\_\_\_
- 23. All monies collected that are designated for Presbyterians Sharing are so forwarded to the church offices. \_\_\_\_\_
- 24. We are responsive to the need for upkeep and maintenance of the church building. \_\_\_\_\_
- 25. We are responsive to the need for upkeep and maintenance of the manse. \_\_\_\_\_
- 26. I feel good about calling this “my church”. \_\_\_\_\_
- 27. I feel excited about what God is doing in and through this congregation. \_\_\_\_\_

**Part II**

- Are there things you would like addressed in our meetings with minister, session or board?
- What is the most exciting thing about being part of this congregation?
- What would you change about this congregation to make it better?
- What training would help you to perform your duties better?
- Do you have a clear understanding of you and your group’s role/function of the congregation?

# FOR COMPLETION BY ALL MEMBERS AND ADHERENTS OF THE CONGREGATION

## Part I

### A Congregational Life

1. I am glad that I am part of this congregation.  Always  Usually  Seldom
2. I participate in a group or committee within the congregation.  Yes  No

### B. Mission

1. I am excited about what God is doing in and through this congregation.  Always  Usually  Seldom
2. I support Presbyterians Sharing.  Yes  No
3. I am well informed about Presbyterians Sharing.  Yes  No

### C. Pastoral Care

1. I am satisfied with the quality of pastoral care and the frequency of contacts and visits by the minister, elders or others of the congregation.  Always  Usually  Seldom
2. I am confident that I can call on my elder for pastoral care.  Yes  No

### D. Worship

1. God speaks to me through the sermons.  Always  Usually  Seldom
2. I find the music inspirational.  Always  Usually  Seldom
3. I find that there is a variety of music in our worship.  Always  Usually  Seldom
4. I think that the congregation is friendly and welcoming to newcomers.  Always  Usually  Seldom
5. My average attendance at worship is 1 2 3 4 times per month (circle one)

## Part II

1. From what do you gain the most satisfaction from being a part of this congregation?  
\_\_\_\_\_

2. What do you find is least satisfying?  
\_\_\_\_\_

3. Identify any problem or need which you think should be addressed as a result of this visitation?  
\_\_\_\_\_

4. Identify any wish or dream that you have for this congregation.  
\_\_\_\_\_

5. Use the space below or the reverse side for any additional comments.  
\_\_\_\_\_

*(You need not sign this survey)*

## THE ACTUAL VISIT

### Suggested Questions to the Minister(s) During the Visit

1. What is your overall impression of the congregation's awareness of the mission of the church?
2. Do you have any concerns re: stipend/travel/housing allowance?
3. Do you have any concerns re: your visitation of the members/adherents?
4. Tell us something about:
  - Bible studies
  - communicants' classes
  - other teaching programs
5. What do you feel is the level of success/failure of the congregation re:
  - stewardship
  - Christian education
  - evangelism/church growth
  - fellowship/pastoral care?
6. What does your church do well/poorly?
7. Are you satisfied with the communication between yourself and the congregation?
8. How would you rate harmony in the congregation?
9. What excites you most about serving in this congregation?
10. What one thing would you change here?
11. Is there any matter you wish to discuss with the visiting team, now or later?
12. What are your reactions to this visitation?  
Your comments will enable us to develop a successful visiting method for the future.

**Thank you for your support of this presbytery-congregation visitation.**

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### Suggested Questions to the Elders — The minister(s) is/are not present

1. Do you have elders' districts?
  - Do you include adherents?
  - How often are visits made?
2. Do you report cases of illness and concern to your minister(s)?
3. Do you possess a copy of the *Book of Forms*?
4. Is there a committee structure in your session?
  - What areas do they cover?
5. Are your session records kept in a safe place?
  - Have they been microfilmed?
  - Would you like help in reaching such a decision?
6. How do you rate the role of presbytery in relation to your congregation?
  - Good Fair Poor
7. What would you say is the mission of your congregation?
  - Do you feel that it is being accomplished?
  - How is the congregation involved in evangelism/church growth? In fellowship/pastoral care?
8. What is your overall impression of the congregation?

9. What excites you most about being part of this congregation?
10. If you could change one thing here, what would it be?
11. Is there any matter you wish to discuss with the visiting team, now or later?
12. Have you any comments concerning the value of this visitation?  
We would like to hear them now.
13. What does your church do well/poorly?

**Thank you for your support of this presbytery-congregation visitation.**

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### **Suggested Questions to the Board of Managers** — The minister(s) is (are) not present

1. Do you have committees?  
What areas do they cover?
2. Are financial reports given at each meeting?
3. What is the board's approach to stewardship?
4. How does the board present a proposed budget for the year ahead to the annual congregation meeting?
5. What is your attitude towards Presbyterians Sharing?
6. Are the finances of the congregation:  
                                    Good   Fair   Poor
7. Are the minutes and records kept in a safe place?
8. What is the state of the church building? The manse? The grounds?
9. Is insurance coverage reviewed annually? Is it reported to the annual meeting?
10. Is the offering counted on the premises? By more than one person?
11. What does your church do well/poorly?
12. What excites you about being a part of this congregation?
13. If you could change one thing here, what would it be?
14. Have you any comments concerning the value of this visitation?  
We would like to hear them now.

**Thank you for your support of this presbytery-congregation visitation.**

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### **Suggested Questions to the Trustees** — May meet with, same time as board

1. Do you have an adequate number of trustees to allow for emergency situations?
2. Do you have a safety deposit box for deeds, bonds, securities, etc.? Does the session know where it is located?
3. Do you report to the annual congregational meeting?
4. Is there an annual/semi-annual review of investments? Is the same reported to the congregation?
5. Is there any matter you wish to discuss with the visiting team, now or later?
6. Do you have any comments concerning the value of this visitation?  
We would like to hear them now.

**Thank you for your support of this presbytery-congregation visitation.**

## Suggested Questions to the Christian Education Committee and/or Representatives of Various Education Programs

1. How do you relate to and report to the session?
2. Is your group financed in part or in whole by the board?
3. How do your groups contribute to the church's life; to the life and mission of the wider work of the church?
4. What curriculum or program resources does your group use?
5. Is the enrolment in your group growing — static — declining?  
Why is this the situation?  
What do you think you might do about it?
6. How is the leadership recruited for your group?
7. To youth groups: Do you participate in the programs of the PYPS?  
To women's groups: Does your group participate in the presbyterial activities?
8. What do you think would strengthen Christian education in your congregation?
9. Do you need help/leadership training from the synod's regional staff?  
What ways could the presbytery Congregation Life Committee assist your Christian education program?
10. Is there anything further you would like to discuss with the visiting team, now or later?

**Note: VISITATION TEAMS need names and addresses for regional staff, Presbytery Congregational Life Committee, presbyterial contact (W.M.S.)**

**Thank you for your support of this presbytery-congregation visitation.**

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## Suggested Questions to the Congregation

1. Why do you attend *this* church rather than another?
2. What does your congregation do very well?
3. What does your congregation not do so well?
4. Are there things you would like the presbytery to know about?  
— joys, special anniversaries, celebrations, needs, challenges?

**Thank you for your support of this presbytery-congregation visitation.**

# Measuring Tool for Ministries Receiving or Applying for Grants from Canada Ministries

— Long Form —

*(To be used by ministries that:*

- 1. are applying for the first time, or*
- 2. are ministries that are receiving a grant but have not previously used this form, or*
- 3. have completed a three year cycle using this and the Short Form)*

## MISSION STATEMENT OF THE PRESBYTERIAN CHURCH IN CANADA

### Who are we?

Disciples of Christ  
Empowered by the Spirit  
Glorifying God  
and  
Rejoicing in Service!

### What do we do?

Relying on the power of the Holy Spirit, we proclaim the love and good news of Jesus Christ through our words and actions.

As a Reformed church, we rely on the truth and inspiration of scriptures for God's guidance into the future — a future that we approach with wonder and anticipation, knowing God is with us.

As worshipping communities joyfully celebrating the sacraments, we are supported, strengthened and equipped to share the love of God revealed in Jesus Christ.

### How do we do this?

- Our mission, in a world where many do not know the gospel, is to tell the biblical story in ever new and creative ways.
- Our mission, in a world wounded by sin unto death, is to point to the redemptive work of Christ and the life changing presence of the Spirit.

- Our mission, in a world burdened with anxiety and apprehension, is to provide a place of sanctuary, tranquility and renewal in the name of the One who said, "I will give you rest."
  - Our mission, in a world where many are oppressed, excluded or ignored, is to call for personal righteousness, justice and reconciliation in the church and in the world and to hear, respect and cherish all God's children.
  - Our mission, in a world of limited resources, is to use God's gifts wisely and fairly for the good of all.
  - Our mission, in a world of many nations, peoples, denominations and faiths, is to learn from one another and work together for the healing of the nations.
- In all times and seasons, we give glory to the God of all creation, to Jesus Christ, the Son, and to the Holy Spirit by whose presence all are blessed.

## PREAMBLE

Support for all ministries will be measured against the Vision Statement adopted by the 115th General Assembly in 1989 (attached) and the Mission Statement adopted in 1995 (above). Congregations will have to demonstrate not only personal growth in relationship to Jesus Christ but also that the community is our mission. Mission statements of new (and existing) congregations will need to show a healthy integration of evangelism, social action and justice ministries. The focus will be on the support and development of healthy communities of faith that embrace the fullness of the good news of the gospel of Jesus Christ. Congregations asking for grants will have to demonstrate that their ministry is viable in terms of these statements.

This tool or a similar one approved by the presbytery and Canada Ministries should be filled in and returned through your presbytery to Canada Ministries.

Charge: \_\_\_\_\_ Presbytery: \_\_\_\_\_

Date: \_\_\_\_\_ Approved by Presbytery: \_\_\_\_\_

### **1. Your Mission Statement:**

A statement which tells succinctly why your mission exists and what it is about. This mission statement need only be a few sentences in length. It should reflect a healthy integration of evangelism, social action and justice ministry.

### **2. The History of Your Ministry:**

A brief history of the congregation giving highlights of its ministry and mission. What is the essence of the congregation's identity?

### **3. A Profile of the Ministry:**

This profile should include membership, number of adherents, reception of members, removal of members, attendance at worship, baptisms and other relevant details.

### **4. A Profile of the Community:**

The faith community has a life that is related to the local community. What is the make-up of the local community, population, type of housing, ethnic mix, presence of other faith communities, both Christian and non-Christian.

### **5. Goals and Objectives:**

The community of faith should supply short term (1 year) and mid term (3-5 years) and long-term (to self-support) goals. These goals should include growth projections of:

- If the community of faith is vital and alive, there will be evidence of personal growth in those participating in the life of the community. This growth may be reflected in participation in study groups, fellowship groups, particular interest groups. These should be identified and the numbers involved and specific objectives should be visible.
- The growth of the congregation as it functions in the community. To be involved in ministry, the congregations will need to have a viable structure to reflect the mission.
- The living of the gospel in the world beyond the community.
- Congregations will be expected to grow in numbers. This would include membership, attendance at worship, households, church school.

#### ***5.1 Short Term (12 Month) Goals:***

(Give dates when it is expect that these will be accomplished)

These goals will be revised annually.

#### ***5.2 Mid Term (3 Year) Goals:***

#### ***5.3 Long Term (5 Year) Goals:***

## 6. Financial Projections

Canada Ministries needs to be able to project what its financial requirements will be over a longer period of time than one year. What are the reasonable projected needs for grants for this ministry over the next five years?

Present Grant	Year 1	Year 2	Year 3	Year 4	Year 5
20__	20__				

## 7. A Vision:

The Presbyterian Church in Canada seeks to be a vital, loving, inclusive family that fosters growth in the Christian faith and lives God's Word.

### 7.1 Vital

A definition of vital is: to be full of life, energetic, vigorous, animated, essential, crucial. Rate your ministry vitality on the following scale.

<b>Sense of Purpose</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>Worship Experience</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>C.E. Program</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>Pastoral Caring</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	

### 7.2 Loving, Inclusive Family

A definition of inclusive is taking everyone into account

What changes and/or initiatives have you created/endured for the sake of including, welcoming, inviting others into your faith community? Please list:

What barriers to inclusion have you identified? How have you been able to take down or remove any over the past few years?

### 7.3 Growth in the Christian Faith

List all the ways that your congregation/mission promotes growth in the Christian faith.

Have you done anything specifically in the areas of:

Stewardship? (Please describe)

Evangelism? (Please describe)

Social Action? (Please describe)

Justice Ministry? (Please describe)

### *7.4 Lives God Word*

List all the ways your congregation has served/reached out/evangelized in your local community, in Canada and in the world.

List specific ways in which individuals in your congregation/ministry have lived God's Word in your local community in the last year.

## **8. General:**

8.1 What have been the areas of greatest growth for your congregation/mission during the past year?

8.2 What have been the areas of greatest struggle and defeat for your congregation/mission during the past year?

8.3 What are the growing edges of your ministry with one another?

8.4 What are the growing edges of your ministry beyond yourself?

## **9. Other Pertinent Facts Regarding Your Particular Mission**

## **10. How do you see this ministry as a part of the total life of The Presbyterian Church in Canada?**

# A MEASURING TOOL FOR MINISTRIES RECEIVING OR APPLYING FOR GRANTS FROM CANADA MINISTRIES

## — Short Form —

*(To be used by ministries which have used the Long Form in one of the past two years.)*

Charge: \_\_\_\_\_ Presbytery: \_\_\_\_\_

Date: \_\_\_\_\_ Approved by Presbytery: \_\_\_\_\_

### 1. Your Mission Statement

*(If a new or revised mission statement has been adapted by the ministry)*

### 2. Review of Last Year's Short Term (12 month) Goals.

List the goals and state how they have been accomplished.

<b>Goal 1</b>	_____									
	1	2	3	4	5	6	7	8	9	10
	Not Attempted			Not Met			Met		Exceeded	
<b>Goal 2</b>	_____									
	1	2	3	4	5	6	7	8	9	10
	Not Attempted			Not Met			Met		Exceeded	
<b>Goal 3</b>	_____									
	1	2	3	4	5	6	7	8	9	10
	Not Attempted			Not Met			Met		Exceeded	
<b>Goal 4</b>	_____									
	1	2	3	4	5	6	7	8	9	10
	Not Attempted			Not Met			Met		Exceeded	
<b>Goal 5</b>	_____									
	1	2	3	4	5	6	7	8	9	10
	Not Attempted			Not Met			Met		Exceeded	

### 3. List previously set or recently revised Mid Term (3 Year) Goals

### 4. List previously set or recently revised Long Term (5 Years) Goals

### 5. Review and evaluate your financial projections from previous year.

Canada Ministries needs to be able to project what its financial requirements will be over a longer period of time than one year. What are the reasonable the projected needs for grants for this ministry over the next five years.

Present Grant	Year 1	Year 2	Year 3	Year 4	Year 5
20__	20__				

### 6. Vitality

A definition of vital is: to be full of life, energetic, vigorous, animated, essential, crucial. Rate your ministry vitality on the following scale.

Mark with a square box  where you were last year and a round box  where you are now.

<b>Sense of Purpose</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>Worship Experience</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>C.E. Program</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	
<b>Pastoral Caring</b>	1	2	3	4	5	6	7	8	9	10
	Least vital								Most vital	

### 7. Other Comments

# Presbytery Visitations to Congregations

## Presbytery of Calgary-Macleod

### Sample Covering Letter

3 February 2003

Dear ,

Every year the Presbytery of Calgary Macleod sends out visitation teams to a few congregations. This is to fulfil the mandate of the *Book of Forms* (section 199) which states:

“The presbytery has power to send forth visitors to see how all things are administered within its bounds. The presbytery should visit the congregations under its care; call the session and the office-bearers before it; inquire into the state of the congregation and its affairs generally and deal with all parties as may be deemed for its edification”.

The presbytery at its November meeting agreed that your congregation be one of those visited this year.

This visitation program is managed by the Congregational Life Committee of the presbytery. We have developed a process for this visitation which is outlined in the accompanying pack of materials. Included are questionnaires for the clergy, elders and board (or) finance committee members to complete. These questionnaires, when returned to the convener of the visitation team, provide an initial overview of the life of the congregation. In turn, the questionnaires help the visitation team to focus their interests and questions during the actual visitation. Please ensure that these people receive copies of the pertinent questionnaire. We would ask that they be collected together at your church and sent in a single package directly to the visitation team convener by March 15th.

The visitation team coming to your congregation will be convened by Rev. (name). The convener will be in touch with you in the near future to arrange a suitable date for the visit. You can contact the convener at:

We thank you for your participation in the visitation this year. We hope that you find it both encouraging and supportive. If you have any questions concerning this, please do not hesitate to contact me.

Your fellow servant in Christ,

Rev. Peter Coutts, Convener  
Presbytery Congregational Life Committee  
St. Andrew's Presbyterian Church  
703 Heritage Dr. SW, Calgary AB T2V 2W4  
Phone: (403) 255-0001, Fax: (403) 255-1302  
Email: pcoutts@st-andrews.calgary.ab.ca

# PRESBYTERY VISITATIONS TO CONGREGATIONS

## Purpose and Goals of Congregational Visitation

The basic purpose for congregational visitation is laid out in the *Book of Forms*:

“It pertains to the presbytery to take heed that the Word of God is purely preached within its bounds, the sacraments rightly administered, the discipline rightly maintained, and the ecclesiastical goods uncorruptly distributed” (198)

“The presbytery, in common with all the higher courts of the church, has the power to send forth visitors to see how all things are administered within the bounds” (199)

“The presbytery should visit the congregations under its care; call the session and the office-bearers before it; inquire into the state of the congregation and its affairs generally and deal with all parties as may be deemed for edification.” (199.1)

“There is no law as to the manner of conducting a visitation. The presbytery must use its discretion in the inquiry, determine its own mode of procedure, and frame its own questions.” (199.2)

“To the presbytery belongs the care and good order of the churches within the bounds.” (200)

The following are some goals for the visitation of congregations:

- To demonstrate the presbytery’s interest in our congregations
- To provide a vehicle for congregational self-assessment of its current life, mission and needs
- To provide affirmation to congregations
- To encourage and support congregations in their efforts towards planning, visioning, development and revitalization
- To gain for the presbytery a sense of the life and health of congregations within the bounds
- To discern areas of congregational need which the presbytery may be able to resource.

## Annual Schedule of Events

This is the typical schedule of elements for the year that has been used in the Presbytery of Calgary Macleod:

Date	Activity
November	CLC (Presbytery Congregational Life Committee) proposes to presbytery the names of congregations to be visited in the following year.
January	CLC proposes to Presbytery the names of conveners to conduct the various visitations.  Conveners find their own visitation team. The team is to have at least three persons (convener plus two) with both genders represented on the team.
January	Once the presbytery approves the names of the conveners, the CLC sends a letter to each congregational session informing them of the visitation: of its purpose, the convener of the visitation team (contact information), pre-visit questionnaires, deadline for submitting questionnaires to the team convener. A congregation can ask that a visitation be deferred to the next year.

March 15	Completed questionnaires are to be returned directly to the convener of the visitation team by this date.
September 30	Congregational visitations are to be completed by this date.
October 15	Report of the visitation team to be returned to the convener of the CLC by this date, so they can be reviewed at the next CLC meeting. The report should use the following format: <ul style="list-style-type: none"> <li>• Name of congregation visited</li> <li>• Names of visitation team members</li> <li>• Date of visit</li> <li>• An outline of the process used in the visitation</li> <li>• A summary of findings</li> <li>• Recommendations from the team to the congregation</li> </ul>
November	CLC reports to the presbytery on the visitations.

The Congregational Life Committee of presbytery desires to improve this process annually. Our committee would benefit greatly from any feedback we can receive from the visitation teams as well as from the congregations being visited. As we learn from our shared experience we can better fulfil the goals for visitation listed on the first page. Please send your comments directly to:

Rev. Peter Coutts,  
 St. Andrew's Presbyterian Church,  
 703 Heritage Drive SW, Calgary AB T2V 2W4  
 (403-255-0001).  
[pcoutts@st-andrews.calgary.ab.ca](mailto:pcoutts@st-andrews.calgary.ab.ca)

# THE PRESBYTERY OF CALGARY-MACLEOD CONGREGATIONAL VISITATION QUESTIONNAIRE

## To Be Completed by *Each Minister on Staff*

Every few years the Presbytery of Calgary-Macleod sends a visitation team to your church to inquire into the life, health and mission of your congregation. We would ask you to complete this questionnaire as part of this visitation team's preparatory work. Please submit all the completed questionnaires together to the visitation team leader by the requested date. Thank you.

1. List three highlights in the congregation's life within the past three years.
2. In your ministry, what are some of your joys and some of your frustrations?
3. Do you feel your ministry is being supported by the congregation? How do they show their support?
4. How would you describe the life and mission of your congregation today?
5. As for the future of your congregation, what needs, issues or challenges do you think your church should address? How have you been giving leadership in these matters?
6. Describe your relationship with:
  - a. the session
  - b. the board / finance and maintenance committee
  - c. other congregational staff
  - d. the congregation
  - e. the presbytery
7. What continuing education have you sought out in the past few years? What do you think your need is for continuing education today?
8. How is your family doing in this environment? Do you have enough time for them?
9. Do you have enough time for rest and relaxation? What do you do for rest and relaxation?
10. Do you believe the congregation is providing you with an adequate stipend and allowances (including upkeep of the manse, if you have one)?
11. Use the space below for any other comments you wish to make.

## THE PRESBYTERY OF CALGARY-MACLEOD CONGREGATIONAL VISITATION QUESTIONNAIRE

### To Be Completed by *Each Elder*

Every few years the Presbytery of Calgary-Macleod sends a visitation team to your church to inquire into the life, health and mission of your congregation. We would ask you to complete this questionnaire as part of this team's preparatory work. Please submit all the completed questionnaires together to the visitation team leader by the requested date. Your responses will be kept confidential.

1. List three highlights in the congregation's life within the past three years.
2. As an elder, what have been some of your joys? What have been some of your frustrations?
3. Do you feel supported in your work as an elder? Is there any kind of training that you would like to have to help you in your role as elder?
4. In most congregations a significant role of the elders is the visitation and pastoral care of people in your elder district. How do you think you do in this work? Is there something that would help you in this caring ministry?
5. From your perspective, how well is the relationship between:
  - a. the session and the minister(s)
  - b. the session and the board of managers / finance and maintenance committee
  - c. the session and other congregational staff
  - d. the session and the congregation

*(Continued on next page)*

6. Please evaluate the following aspects of congregational life during the past three years (circle your response):

	N/A	Poor	Fair	Excellent
Congregational Vision and Direction	0	1	2	3 4 5
Pastoral Care	0	1	2	3 4 5
Maintenance of Congregational Records (Session minutes, the Roll, Baptism / Marriage Register, Annual Reports)	0	1	2	3 4 5
Christian Education / Nurture of Faith	0	1	2	3 4 5
Stewardship	0	1	2	3 4 5
Worship	0	1	2	3 4 5
Mission	0	1	2	3 4 5
Church Growth	0	1	2	3 4 5
Involving People in the Work of the Church	0	1	2	3 4 5
Being Involved in the Wider Presbyterian Church	0	1	2	3 4 5
Denominational Issues	0	1	2	3 4 5

If you wish to comment on any of these areas, please use the back of this questionnaire.

7. Name up to three challenges presently facing the congregation.

8. Does your congregation currently have stated goals? How is your congregation doing in fulfilling them?

9. What is your personal vision for the future of your church?

10. Does the session provide pastoral care for the minister(s) and their family / families?  
If yes, what form does this care take?

11. If your congregation has other additional staff, how is the congregation's relationship with them?  
Do you have any concerns here?

12. Are there any other thoughts or concerns of which you would like the presbytery to be aware?

# THE PRESBYTERY OF CALGARY-MACLEOD CONGREGATIONAL VISITATION QUESTIONNAIRE

## To Be Completed by *Each Member of* The Board of Managers / Finance and Maintenance Committee

Every few years the Presbytery of Calgary-Macleod sends a visitation team to your church to inquire into the life, health and mission of your congregation. We would ask you to complete this questionnaire as part of this team's preparatory work. Please submit all the completed questionnaires together to the visitation team leader by the requested date. Your responses will be kept confidential.

1. List three highlights in the congregation's life within the past three years.
2. In your service on this committee, what has been rewarding? What has been frustrating?
3. How do you feel about the congregation's financial position?
4. Does your congregation have a program to promote financial stewardship within the congregation?  
If yes, what form does this program take?
5. How does your congregation promote the support of Presbyterians Sharing? How successful are you in meeting your accepted allocation for Presbyterians Sharing?
6. Are your church facilities well maintained?  
What have been major accomplishments in the maintenance of your facilities (including manse if applicable) in recent years?
7. Do you have any significant maintenance needs in your facilities (including manse if applicable)?
8. Does your congregation submit the annual statistical report to the General Assembly each year?
9. Are financial records well maintained and audited annually?
10. From your perspective, how well is the relationship between:
  - a. your committee and the minister(s)
  - b. your committee and the session
  - c. your committee and other congregational staff
  - d. your committee and the congregation

# Tools for Presbytery and Congregations in Discerning Health

## Excerpted from Report of the Task Force on Congregational Viability — Presbytery of Hamilton

The following questions may be helpful to your congregations as you assess your own balance in terms of viability and health. They will also help you to begin a journey of exploring and balancing the five purposes of the church (p. 2 of this report) in your own congregation (and by extension, in the whole body of Christ). Resources for each section are listed at the end of this report. If you find an area or areas in which you are having difficulties, please ask the presbytery or your colleagues for assistance. We are not here, as Steinke says, for competition, but to build up the body of Christ.

### Getting an Overall Picture — Health and Leadership

1. Does your congregation have a clear sense of mission? What is it?
2. Is the congregation vibrant and visible in the community? How?
3. Does the community in which you live know what your church is about? How does this community perception compare with your sense of mission?

### Leadership

1. Does the leadership of the church know, support and understand the congregation's mission, and the five purposes of the church?
2. How is the leadership in a congregation discerning God's will for the congregation? Does the leadership seek the guidance of the Holy Spirit? How?
3. How has the leadership (clergy and session) understood or is seeking to understand the particular

environment and context in which the community abides?

4. How are they seeking to achieve opportunities for the congregation to be involved and grow in these five purposes listed above?

### Overall communication

1. What are the communication lines in your church? How is information and feedback exchanged?
2. Do you have clear guidelines for decision-making, dealing with requests?
3. How does your leadership and congregation deal with difficulties or conflict?

For the next sections, it will be helpful to have a list of all of the ministries in which your church is involved (currently). Divide these ministries into categories of the five purposes discussed above. Approximate how many people are involved in each ministry (numbers are not important, but they will help you as a congregation to look at which ministries are growing, declining, or need to be looked at again in terms of their individual viability).

There may be some overlap of ministries between purposes — that's ok! A small group bible study, for example, may fulfil all the purposes except for corporate worship.

If you have a ministry that does not fall into one of the five purposes, put it on a separate list. You will need to see how this group or program fits into the biblical calling of your church.

## Worship

1. Does our worship allow people to encounter God corporately and in their day to day lives?
2. Do we express our dependence on God and our gratitude for all that God has done for us?
3. Is our membership (on the roll, including adherents) accurately reflected in those regularly attending worship? (How are those who are **unable** to attend worship included in the worship life of the community?)
4. What is the focus of our worship?
5. What are the biblical or theological bases for why we worship the way we do? (order of service, liturgy used, styles of music)?
6. Are our resources (people and finances) for worship internal or external to the church?
7. How is our worship supported?
8. How are we ensuring that we have ongoing faithful leadership in worship? (not just the minister)

## Discipleship

1. Does our church provide opportunities for all of its members to be “equipped with practical guidance for living one’s faith in the world during the week”? (A helpful exercise here is to look at the various age groups in the congregation and ask the question for each group individually. Is there a group or demographic that is being “left out”?)
2. Are there unaddressed areas of discipleship for which we need further training or resources?
3. Are discipleship training opportunities happening on an ongoing or a sporadic basis? Why?
4. Listen to coffee hour conversations. How do people in our congregation talk about the role their faith has in their life during the week? What is different in these conversations from a year ago?
5. Are our resources (people and finances) for discipleship and equipping disciples internal or external to the church?
6. How are our discipleship ministries supported?
7. How are we ensuring that we have ongoing faithful leadership in equipping disciples? (not just the minister or the session)

## Fellowship

1. How does our congregation share the love of God and God’s grace in and through God’s people?
2. What opportunities does a newcomer or an old member have to intentionally be in community to experience the love of God? (please note: the intentionality of sharing GOD’s love, not just a social time, is crucial to differentiating the church from other organizations)
3. How does our congregation integrate new members into the community of faith (from the time they walk through the door until they grow in faith to maturity)?
4. Are our resources (people and finances) for fellowship internal or external to the church?
5. How are our fellowship ministries (including pastoral care) supported?
6. How are we ensuring that we have ongoing faithful leadership in creating and maintaining opportunities for fellowship? (not just the minister or the session)

## Service

1. What opportunities for service *in Jesus’ name* is our congregation involved in? (List both those things to which you contribute monetarily and those things which involve “people hours”.)
2. Do people in the community (not regular members or adherents) know that our church “meets needs and heals hurts in Jesus’ name”? Do our members and adherents know this?
3. How much of the church’s purpose of service is done by members or adherents in the community outside of the church walls?
4. What needs exist in our community or on a wider scale for service in Jesus’ name? (This may involve some door-knocking and looking at previous census data or community studies)
5. What are the emerging needs in our community (things for which the congregation can start preparing for two or three years down the road)?
6. Are our resources (people and finances) for service internal or external to the church?
7. How are our service ministries supported?
8. How are we ensuring that we have ongoing faithful leadership in creating and maintaining opportunities for service in Jesus’ name? (not just the minister or the session)

## Evangelism

1. How are those in leadership of our church “witnesses to what they have seen and known to be true of God in their lives”?
2. Where (or to what demographic) is our evangelism focus? How does this focus reflect the community environment in which God has placed us?
3. What are the primary means for evangelism in our congregation?
4. How do we provide follow-up for the evangelism we do (so that people can grow as disciples of Christ)?
5. Are our resources (people and finances) for evangelism internal or external to the church?
6. How are our evangelism ministries supported?
7. How are we ensuring that we have ongoing faithful leadership for evangelism in our community? (not just the minister or the session)

# Worshipful Work

Charles M. Olsen in his book *Transforming Church Boards*\* describes “worshipful work” by inviting the church, when it does its business, to do so in the context of worship. What we do in our business meeting is therefore seen as being part of our reasonable service to God.

Our reasonable service to God includes worship, service, hospitality, celebration, pastoral care and prayer.

What is shared below is designed after the pattern used by Olson. This is for an evening meeting. If the meeting is a daytime one, the fellowship described below could be lunch. If it is an afternoon/evening meeting the fellowship would be supper. Some evening meetings have supper prior to the meeting. This is encouraged as a way of creating fellowship.

## WORSHIPFUL WORK

An order of service/agenda for a presbytery meeting

### Gathering

- Some courts are preceded by fellowship over supper

### We Assemble in God’s Name

- Invitation and call to worship
- Prayer of approach and constitution
- Roll and regrets (“in memoriums” as appropriate)
- Welcome of visitors/guests
- Gathering hymn

### We listen for God’s word

- Scripture (A reading suitable for the time of the church year or relating to significant items on the docket)
- Meditation

### We serve with commitment to Christ’s calling looking back and looking forward

- Approval of docket
- Minutes of last meeting
- Correspondence
- Reports on the various ministries of the presbytery

### We care for each other

- Interim moderator reports
- Sharing from host congregation
- Sharing of joys and challenges from other congregations
- Hymn of celebration

### We share in hospitality

- Refreshments and fellowship

### We continue to serve

- Ministry reports (continued)
- Emerging concerns (new business)
- Announcements

### We go forth with joy

- Hymn
- Commissioning prayer (offering thanksgiving and intercession to God for decisions made)
- Time and place of next meeting
- Adjournment and benediction

---

### Periodic items that can be included under Service or Celebration:

**Translations** — When calls are being considered and decisions are being asked for, special prayers may be offered for individuals as they seek God’s guidance.

**Special times** — Retirement; recertification of students and certification for ordination; commissioning of missionaries, etc.

### Inductions and/or Ordinations

These are usually separate meetings given over exclusively to the worshipful work of the covenanting of a minister, congregation and presbytery.

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\* Charles M. Olsen. *Transforming Church Boards into Communities of Spiritual Leaders*, The Alban Institute, January, 1995



# **PRIMARY RESOURCES** *for Chapter 3*

# Planning Your Congregation's Future

A Planning Tool  
for Congregations and Presbyteries

The Called to Covenant Project  
Life and Mission Agency

**Called to Become ...**

CONTACT:

**Jim Czegledi**

Associate Secretary

Evangelism, Church Growth and Worship

The Presbyterian Church in Canada

# Planning Your Congregation's future

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## THE MINISTRY OF PLANNING

Congregations yearn to move forward in faith. We believe that God continually calls the church to be more than it is right now.

Planning is concerned with the future of the church. The fact that ministry is spiritual in nature does not diminish the need for planning. Planning can help congregations to focus on their vision and priorities for witnessing to God's grace in Christ in response to a changing environment. This ensures that members feel positive about their potential and are working toward the same goals. Planning can assist the church in looking ahead to the kind of environment or culture that reasonably can be expected for it, with God's help. At the same time, planning can help the church to take a realistic assessment of its current situation.

Church planning is different from other forms of planning. Church planning is done in the presence of God and God's people. We approach this process the way we approach worship, invoking God's blessing and presence, praising and thanking God for what God has done and promised yet to do for us in Jesus Christ. While we confess our shortcomings, we focus on the potential God has created for us and acknowledge the inspiration for that potential we find in scripture. Good planning keeps the focus on the talents and opportunities we enjoy that Christ has given the church to witness to the gospel. In this context, we pray and seek discernment as we prepare ourselves to plan. Indeed, the church needs to pray constantly and to seek to discern God's will throughout the entire planning process. This spiritual 'work' is foundational to all church planning.

While planning is not explicitly named in the bible, it underlies many of the stories and experiences of God's people. Indeed our praises and prayers to God regularly flow out of a belief in God's *plan* for ourselves and for all creation.

If we re-read familiar texts through the 'planning' lens, we realize the critical difference made by planning and not planning for the community life and relationships of God's people. For example:

- God described a plan and involved Noah in it prior to the flood. Afterwards, the making of a new plan was formalized in God's new covenant, symbolized by the rainbow. (Genesis 9: 8-17)
- Moses encountered challenges to the plan he had put in place for maintaining harmonious community life for God's people. However, following discussions with his father-in-law, Jethro, in which they analyzed the situation, a new strategy was developed and implemented. (Exodus 18:13-24)
- Jesus' journey to Jerusalem was a plan, although his disciples had difficulty understanding its purpose and strategy. (Mark 9:33-37)
- Jesus' teachings include descriptions of God's plan. He challenges his listeners to new attitudes and approaches when he articulates what God's kingdom is like. (Matthew 20:1-16)
- Jesus' parables sometimes imply the need to prepare and to have a purposeful strategy. For example, while a parable like the shrewd manager has various interpretations, it does include praise for the manager who was able to make and implement a plan that ensured his own survival. (Luke 16:1-9)
- In the stories of the early church in the Book of Acts, when differences of opinion challenged members, the leaders repeatedly engaged in a planning process. They assessed their situation, re-articulated their faith and their visions, and re-negotiated strategies so that the church not only survived but grew. (Acts 6:1-4, 15)

### The Purpose of this Document

This resource is to provide congregations and presbyteries with a tool to assist them in planning for their future. (For presbytery's plan for presbytery, please see Appendix C.) This resource gives congregations methods, questions to be asked, and tools and resources for planning. The planning process includes four stages: preparation, analysis, implementation and evaluation. In keeping with their oversight role, presbyteries may assist the congregations under their care with this work. This may involve members of the presbytery in leading congregations through the planning process or in assisting the congregation in the fourth stage of evaluation.

No planning tool is perfect. Every congregation and community is different. Some congregations may choose to modify the processes described in the planning tool to suit their specific needs. Congregations may choose to ask some of the questions identified in this planning tool as a way to begin discussions, which will lead to planning. We trust that

this resource will serve as a guide in assisting your congregation to plot future directions. As congregations engage in the ministry of planning, we trust that people's religious imaginations will be stirred and that congregations will be led by the Holy Spirit.

May this tool serve the planning needs of your congregation and your presbytery to enable you, as part of the body of Christ and the people of God, to continue doing God's work.

## STAGE 1 — PREPARATION

### Getting Ready To Plan

The planning process begins with a review of your congregation's mission and vision. If your congregation does not yet have a clear and articulated mission or vision statement, we suggest that you follow the process outlined in the *Congregational Awareness Studies*.

#### FIRST STEP

It is recommended that congregations begin future planning by using the *Congregational Awareness Studies*. The first three studies focus on Church Health, Church Leadership and Congregational Mission and Vision.

Congregations that would like to be more intentional about their evangelism and outreach will want to include the fourth study, which focuses on creating an action plan for evangelism. Obtain these studies from the Synod Regional Staff representative or from this website: <http://www.presbycan.ca/evangelism/CongregationalAwarenessStudies.pdf>

### Assessing the Readiness of the Congregation To Engage in Planning

One cannot underestimate the role and influence that emotions and sentiment play in church life. These dynamics, present in every church, do not lend themselves to making logical choices. Leaders must always be aware of these forces and respond and plan accordingly.

Change is never easy or painless. A change of any kind can represent to people a sense of loss. This is especially true for changes made in churches. People can respond to change as a loss of certainty or a loss of control. Both can produce anxiety and unrest in congregations. To implement change effectively, see the "8 Stages for Effective Change", p.18-21 in the *Congregational Awareness Studies* noted above.

Given the nature of people's response to change, it is not surprising that leaders often face resistance and dissent to their plans. They need to prepare themselves and their congregations for these realities.

How much congregational pain will these changes involve?

A major reason why congregations fail to make bold and decisive changes is the fear and the pain that they believe will result. But can your congregation afford not to make these changes?

The key question to ask throughout this planning process is:

#### **"How does this enable our congregation to contribute its best to the work of Jesus Christ in the world?"**

For smaller congregations it is more important to have people give input and "own" the plan and vision. For larger churches of over 200 in worship this is not as feasible. These churches need to concentrate on the clarity and communication of their plan and vision and to trust their leaders to create it.

While it is important that everyone be given their opportunity to speak about the church's plan and vision, not everyone's wishes will be granted and compromises will need to be worked out.

#### RESOLVE CONFLICT

Congregations engaged or stuck in severely divisive conflict need to resolve or manage these issues before they begin the planning process. It is vital to resolve major outstanding issues before planning for the future.

Those churches engaged in moderate levels of conflict may find the planning process a means to work through issues.

## Types of Planning

According to Gil Rendle and Alice Mann, in their book *Holy Conversations*, there are three types of planning (see Appendix B). They are:

### *Developmental Planning*

- Long-range planning
- Asks: “What’s next?” and “What do we do now?”
- The assumption is that things are well. What we are presently doing is faithful and appropriate.
- Goal: to determine the next steps, building on what is presently happening.
- Timeline: 3 - 6 months to complete, revised every 1 - 2 years.

### *Frame-bending Planning*

- Strategic planning
- Asks: “Who are we?” “What are we called to do?” “Who is our neighbour?”
- The assumption is that things are not working. What we are currently doing is not faithful or effective.
- Goal: to go back to the beginning and examine our purpose and call from God.
- Timeline: 12 – 18 months to complete, revised every 3 - 5 years.

### *Problem-Solving*

- Short-term planning
- Problem-solving methods designed to fix things.
- Goal: to return to the way they were before the problem.
- Timeline: immediate and short-term.

Congregations need to ask first what type of planning they need for their church.

#### **LEADERSHIP**

Planning is a responsibility given to congregational leaders. Leaders can be clergy, elders or congregants.

The role of church leadership is to discern the will of God and to listen to congregants. It is the leaders’ job to create, articulate and communicate a plan to the congregation.

#### **DISCERNMENT**

Discernment is the attitude and practice by which we open our hearts and minds to the will of God. It is listening to the “still small voice” of the Spirit of Christ that calls the church forward in faith.

## The Role of Session and Presbytery

The session is responsible to the presbytery for the supervision and oversight of all member and adherent associations connected with the congregation (*Book of Forms* 109.1). This includes the planning process. Although the session in most cases does not actually do the planning work, it is vital that they “own” the process. Without their support the planning process can easily be sabotaged. The session must have interest, agreement and passion for the plan. Once a plan has been established it is the responsibility of the session or presbytery to make sure that it is carried out. See Stage 3 and Appendix C.

## A Proposed Process

1. Form a planning team for your congregation with approximately six people who are spiritually gifted in the area of planning, leadership and discernment.
2. Provide a clear mandate and timeline for the planning team.
3. The planning team meets, reviews mandate and timeline, and outlines the actions members will take and when actions will be completed.

4. The planning team sets a date for a congregational meeting — a date that will allow time for a questionnaire to be distributed, completed and returned.
5. The planning team creates a questionnaire or adapts the one provided with this resource. (See Appendix A.1.)
6. The team distributes the questionnaire and designates to whom it should be returned and by what date (i.e. minimum one week prior to congregational meeting).
7. Team members tabulate the responses and prepare a summary that identifies areas of common strengths and concerns for presentation at the congregational meeting.
8. Team members prepare the meeting agenda, deciding if the SWOT technique (pages 42-44) will be part of the meeting or used in another way.

### THE SWOT TECHNIQUE

The SWOT technique outlined on pages 42-44 provides a question and answer process that can be used in the form of a questionnaire handout for individuals or small groups/ committees to be completed on their own time. It can also be completed in a facilitated small group process at a congregational meeting. In advance, review the questions and adapt them to your situation so that they will stimulate responses from your congregants. *It is crucial to good planning to keep the focus of attention on the strengths and opportunities you discover. People have a natural tendency to focus on weaknesses and threats. They put all their attention there without realizing they have strengths to bring to their challenges.*

## The Congregational Meeting

1. If the size of your congregation permits hold the meeting at the best possible time and day for your church community. Many congregations prefer to begin first thing on a Saturday, concluding by mid-afternoon. If you foresee the next step taking a great deal of time, schedule the meeting for two Saturdays.
2. Begin the meeting with worship and close the meeting with prayer.
3. Planning team members lead a review of the Preparation Stage and present the summary of the questionnaire results.
4. Divide into small groups (8-12 people). Ask for one or two volunteers in each group to be the facilitator/note taker to read out the tasks, take notes, encourage everyone from the oldest to newest members to participate, and watch the time. The tasks for participants in the small groups are as follows:
  - a. Share reactions to the presentation.
  - b. Connect their faith and church stories to the current situation.
  - c. Share opinions about this statement: “What was true of the church in the past is true of the church today.”
5. Have everyone come together and invite reports from small groups with a volunteer noting key points from each group. Invite everyone to respond to the small group reports and then to comment on the place and importance of the church in people’s lives.
6. Use a technique like the SWOT (Strengths, Weaknesses, Opportunities and Threats) technique, recording responses for tabulation by the planning team.
7. Following the congregational meeting, the planning team meets to analyze and review the data collected at the meeting.
8. The planning team articulates goals and visions from congregational input. Note the need to set **SMART** goals:
  - Specific** — Enough detail so that little questions will be raised.
  - Measurable** — Goals should be tangible enough that when you have finished there is evidence of completion.
  - Attainable** — Is the goal within reasonable reach?
  - Realistic** — Are your goals likely to be realized?
  - Time Specific** — Do you have a time frame to provide structure for your goals?
9. The planning team calls and conducts another congregational meeting to present in detail the proposed vision, goals and action plan.
10. Entertain questions from congregants. Discuss and note specific suggestions.
11. The planning team meets again to revise the plan, working out changes where necessary. The plan is then implemented.

**Optional:** The planning team may use the information in Appendix A.2 to identify where the congregation is in *The Life Cycle of Congregations*.

## STAGE 2 — ANALYSIS

The first steps in the analysis stage require you to gather information. What can we learn about God, about ourselves and about our world?

### The SWOT Technique

The SWOT technique helps analyze:

- **S**trengths
- **W**eaknesses
- **O**pportunities
- **T**hreats.

*“As you go, proclaim the good news”*

Read Matthew 10:5-14. How does this passage reveal that Jesus was aware of the strengths and weaknesses as well as the opportunities and the threats as the twelve disciples went out to proclaim the good news?

This technique leads to reflection on these questions:

- What are your church’s internal **strengths**? What things do you do well as a congregation?
- What are your internal **weaknesses**? Where can you improve?
- What external **opportunities** exist for your church to expand its mission and vision?
- What external **threats** might hinder the pursuit of your mission and vision?

Individually or in a group respond to the following questions. Initially the questions focus on the end result, on what your dream or vision is for your church. Then the process moves on to examine your church’s strengths and weaknesses, and then to identify the existing opportunities and threats.

### The Vision — seeing the big picture

1. Where are we as a people of God now?
2. What is our history?
3. Why are we who we are?
4. Who do you really want to be as a church in three to five years?
5. What do you believe God is calling you to do?
6. How will we do things?
7. Where will we do ministry?
8. What will we have?
9. How will God bless us?
10. Is it important for the outsider to be included? How could we do this?
11. What three concrete wishes do you have for the future of your church?

#### 1. Strengths

1. What do we value the most about our congregation?
2. How has God blessed this church?
3. What are our spiritual resources?
4. In the following list, circle items that you consider strengths:
  - Financial resources
  - Financial stewardship
  - Members’ ability to commit talent and time
  - Church building
  - Physical facilities (space, parking, grounds, accessibility, location)
  - Community resources (e.g. other churches, recreational facilities, not-for-profit organizations, community leaders like school principals and teachers, police chief, elected officials)
  - Church or denominational staff, consultants.

List the three greatest strengths of your church as part of the people of God.

#### COLOUR CODING

You may wish to ask participants to place a coloured dot on the most obvious strengths and pressing weaknesses to help prioritize them. This colour coding assists when it comes to ranking.

## 2. Weaknesses

1. What are the major weaknesses of your church?
2. What does your church do poorly?
3. What internal attributes restrict the full potential of your congregation?

### USING STRENGTHS TO OVERCOME WEAKNESSES

*Did you know that...*

- most of the challenges churches face are internal in nature?
- churches can use their strengths to overcome their weaknesses?

**Try this exercise:** Identify two areas of strength and one area of weakness. Brainstorm how your church can overcome the weakness by using the strengths.

## 3. External Opportunities for Your Congregation

*“But seek the welfare of the city where I have sent you into exile, and pray to the Lord on its behalf, for in its welfare you will find your welfare.” Jeremiah 29:7 NRSV*

God’s message to the exiled Hebrews was to seek opportunities to serve God even while living in Babylon. What are the windows of opportunity for your church given its external context? You have heard the phrase “the window of opportunity.” Windows enable us to look outside from within and they allow others on the outside to look in. Looking at your community through windows can help your church gain a perspective that will enable it to be more effective in ministry and mission.

### Window #1

*The Spiritual, Social and Cultural Needs and Character of Your Community*

1. What are the spiritual, social and cultural needs of your community?
2. How would you geographically define your community? Is it your church’s neighbourhood? Is it citywide or a region?
3. What type of community is it — urban, neighbourhood, regional, rural, remote, suburban, inner city?
4. What state is your community in? Is it growing, stable or declining in population?
5. Who are the majority of the residents — retired persons, young families, young professionals, empty nesters?

### WHO IS YOUR NEIGHBOUR?

Walk or drive with a group from your church through your neighbourhood. Where do the people gather? Is it the local shopping mall, the coffee shop or the sports arena? Go where the people are and find out what they are talking about, what matters to them and how the church can contribute.

6. What is its ethnicity and religious affiliation: What are the immigration levels from non-Christian countries, non-Protestant affiliations in your community?
7. What are other churches doing in your community? What programs or ministries do they provide? How can your church complement these ministries?
8. What are the spiritual and social needs of the community?
9. If your church did not exist, what would the community miss the most?
10. What opportunities for ministry and mission exist for your congregation in its community? How can the church respond?
11. How can the church confirm or challenge your community’s values in a way that is consistent with the gospel?

## Window #2

### Demographic Information

1. What are the perceptions of your members about the church's community? How has it changed in the last 10 years?
2. Are these perceptions nostalgic, negative, optimistic or accurate?
3. From where do you now draw people? What are the characteristics demographic and geographic? In 10 years what will your congregation look like demographically?

## DATA SOURCES

Give one or two volunteers the task of gathering demographical information about your community from the local library or from Statistics Canada ([www.statcan.ca](http://www.statcan.ca)). Then prepare a one-page report to present to the congregation outlining the important demographical information and providing background for the questions.

## Window #3

### The Larger Context

As you examine your community's social environment, it is important to understand that it does not exist in isolation. You must take both the larger contexts and your own personal context into consideration.

Here are some examples of possible contexts that affect the ministry and mission of churches. Which ones are appropriate for your church?

1. How has your church changed in the last 50 years?
2. What is the age make-up of your congregation? Of your community? What generation(s) are missing?
3. Where are people on Sunday mornings? What are they doing? (e.g. Are they: recreating, working around the house, at work, at vacation properties, shopping?)

## Ranking Opportunities

By looking at your community through these windows, members catch glimpses of opportunities for the congregation's ministry and mission. Brainstorm a list of all the possible opportunities and record them. List areas where church strengths can match community needs. Then rank the items according to importance and urgency and then formulate a SMART goal (review SMART formula for goals on page 41) for the highest ranked items.

## 4. Threats

Threats are realities or structures that limit the development or growth of churches.

1. What are the barriers or threats that prevent your church from moving forward in faith?
2. In the following list, circle items that you consider potential threats or constraints:
  - i) Declining population of church community
  - ii) Inability to change in order to meet current needs
  - iii) Community realities that pose a challenge to the church's outreach
  - iv) Decline of Christianity and Presbyterianism in Canada
  - v) Declining worship attendance (e.g. people in church community too busy, more non-Christians, more apathy, church seen as irrelevant)
  - vi) High cost of maintaining ministry and the upkeep of the church building.
3. What other factors (external or outside of the immediate control of the congregation) constrain the development of your church's potential?

## The Ministry Map Technique

Another technique for a planning committee is the mapping of the home location of all church members and adherents. This may help redefine the boundaries and social context for the ministry of the church. Regardless of where the members live, the church exists to serve the community in which it is located. Knowing that community and its social context is critical.

Following worship, perhaps at the fellowship hour, set out a map of your city, town or county. Ask members to place a pin to indicate where they live and check their name off on a list. Do this for a few Sundays so that as many people as possible will have a chance to participate. Place pins for those who have been absent and then display the completed map at the fellowship time for a few weeks, inviting everyone to examine it and discuss the implications.

### To promote discussion, post these questions:

1. What can be determined as a result of where the members live in relation to the community?
2. How many people live within walking distance of the church?
3. What parts of the community are not represented?
4. Who or what is this church's community?
5. What do you think are the implications of this mapping for the church's ministry?
6. What trends do you see?

*Invite people to submit their ideas in writing to the planning team.*

## Discerning a Strategy: Forming an Action Plan

The second part of the analysis stage requires you to use the information you have gathered to discern a strategy or plan for your congregation. What will the congregation's future directions be?

Approach this stage of the planning process with prayer, bible study and faith sharing. Remember, you are trying to discern how God is calling you to use the power of the talents and gifts in your congregation to contribute to Christ's work in the world. Then reflect on these questions:

1. What has God called you to become?
2. Is your vision reality based?
3. What are the spiritual needs of your community?
4. How can you respond to the needs in a Christian way?

The congregation as a whole decides through their contribution and support if this plan is of God. Review the dreams of the congregants. What is preventing them from achieving those dreams? What are the self-limiting structures or dynamics that are preventing dreams from becoming reality?

State the goals or objectives of your plan. A goal is simply something you want to accomplish. Remember the SMART formula for setting goals (see page 41). The goals need to be realistic possibilities, not daydreams. The goals must reflect what a congregation truly wants and is committed to do.

Plans need to be clearly defined and there must be measurable implementation steps and a timeline.

## Goals

Prepare a statement of goals that answers these questions:

1. Who are you trying to reach with the gospel?
2. What is the vision or what are the dreams for your congregation?
3. What are your goals (minimum of three, maximum of five) for your church's ministry?

## Action Plan

Prepare a statement describing the action plan that answers these questions:

1. How are you going to reach your goals?
2. What are the top one or two challenges and what is your church's strategy to overcome them.
3. What are two or more ideas or programs that your church will undertake in the next 6-18 months to achieve your planned goals.
4. Who will review and evaluate your plan (i.e. the session, a congregational meeting, a committee)?
5. Who is going to do what?
6. How is your church committed — financially, emotionally, physically and spiritually — to implementing the plan?

The planning team drafts the statement of goals and action plan based on the analysis of collected data. Team members present these at a congregational meeting where they entertain questions and seek consensus and clarity on details.

### RESOURCES FOR PREPARING AN ACTION PLAN

For resources related to creating an action plan for evangelism go to: <http://www.presbyterian.ca/evangelism/CongregationalAwarenessStudies.pdf> or see *Awareness Study #4*, page 39.

## Reviewing Options for Ministry and Mission

In making action plans, congregations are helped sometimes by reviewing options.

Choose one of the following options or generate your own. Formulate the most likely scenario and think of how your church could work toward the desired outcome. Examples of congregations or presbyteries that have chosen the particular options are given in parentheses.

Staying the same or maintaining the status quo is not a planning option. However, many churches which do not change or try new things are making a conscious choice to stay the same.

### SEEKING GOD'S GUIDANCE

The prophets often called out to God with yearning. Many of the psalms describe the deep longing for God's guiding presence through difficult times. Ask the committee members for some of their favourite readings and listen as they are read aloud. Take time to share your understanding of them and to experience God anew in your lives.

### 1. *Amalgamate with another congregation*

This involves joining with another congregation, involving a union or marriage between the two church communities. Are they culturally similar enough to exist peacefully as one?

Describe the scenario.

### 2. *Associate with another congregation but remain autonomous*

This ensures that the congregation continues and it could help to address issues related to finance and ministry. The result would be a half or a third time ministry, which may restrict growth.

Describe the scenario.

### 3. *Adapt to your community*

The church connects with the community and its needs.

- a) By staying the same and trying to reach new people. What then has significantly changed to bring about growth?

Describe the scenario.

- b) By changing the culture (e.g. leadership) and trying to reach new people. This can be difficult to do with the same or existing leadership.

Describe the scenario.

- c) By changing the leadership structures and trying to reach new people. The challenge is to attract new leaders and have their leadership accepted by the congregation.

Describe the scenario.

### 4. *Relocate to a more promising location*

This might entail selling the property and moving to a different location. This represents a major change, a courageous act and will of leadership as well as a bold new vision for ministry by the congregation and the presbytery.

Describe the scenario.

### 5. *Continue to decline and eventually close*

This is what happens to the majority of congregations that face decline. Despite various attempts, they are not able to reorient or to adapt to their community. Death is part of the life cycle for every living organism, including the church. There comes a time in the life of some congregations when they are no longer viable as a church. Presbyteries need to assist congregations through this process and ensure that ministry continues even though the church does not. The good news is that the gospel speaks about resurrection. Will your church's mission and ministry continue if your church dies? The eventual closure or significant decline of a church may be the price congregations pay for maintaining the status quo.

Describe the scenario.

### 6. *Become a niche congregation*

Niche churches draw from a larger metropolitan region and focus on a specific area of ministry (i.e. liberal-conservative theologically, social justice, ethnic, arts community). For information read *Find a Niche and Scratch It* by Robert L. Perry (Alban Institute 2003). Having identified a niche, the congregation focuses its mission on a specific group. Is this specific group large enough to sustain a viable ministry?

Describe the scenario.

### 7. *Trained lay ministry*

Ministry can be organized around the spiritual giftedness and training of lay people who may be paid. This is a viable biblical model for ministry. This may be effective for small or rural congregations that are not in a position to call ordained clergy.

(Presbytery of Cape Breton, Nova Scotia)

Describe the scenario.

### 8. *Become a transformed congregation*

A totally new beginning or new birth can be the radical transforming result of near death or some creative entrepreneurial initiatives. This requires transformative leadership skills from the pew and pulpit. The reality is that few leaders of this type exist. This is a high-risk option that may be open to churches near closure — what do they have to lose?

(Trinity Community Presbyterian Church — Oro Ontario, Presbytery of Barrie, St. Paul's Leaskdale, Presbytery of Pickering)

Describe the scenario.

### 9. *Become a campus church*

A campus church is where two or more congregations worship at different times. They form multiple church or faith communities or another Presbyterian church at one location. This is analogous to having two families living in one house. Several housekeeping issues would need to be resolved. This option may limit potential development of the congregation due to logistic and space realities.

(White Oaks Church, Presbytery of Brampton)

Describe the scenario.

### 10. *Cluster with other congregations*

A cluster is a group of three or more congregations that have covenanted together for mission and ministry. They have a ministry team of at least three persons, ordained and lay, that covenant throughout the ministry cluster: not *one minister* and *three churches*, but *one team* and *three churches*. It can be seen as a way to “buy” time for a congregation or it can utilize congregational giftedness for enhanced ministry. Ownership of the team concept for ministry and the focus on mission are key.

(The Good News Cluster, Cookstown Ontario, Presbytery of Barrie)

Describe the scenario.

### 11. *Become a regional church*

A congregation might seek to attract people from a large region of a metropolitan area. This would be suitable for a mid-sized or larger church with an emphasis on programs. The church needs to be intentional and expand its vision for ministry beyond the local community — it would need to go beyond mental, physical barriers/boundaries.

Describe the scenario.

### 12. *Become a neighbourhood/community-based church*

A neighbourhood church concentrates ministry on reaching the needs of people in the immediate area or community (within three miles) of the church location. This might be suitable particularly if a church is committed to a geographic area and has little parking or is not served by public transportation. However, it does limit a congregation's focus.

Describe the scenario.

### 13. *Become a satellite church*

New congregations can be developed within a reasonable distance from the main (mother) church. These satellites may offer different worship styles based on needs of the community and/or target groups and can be a model for large churches. Eventually the “sending” church lets go.

Describe the scenario.

### 14. *Generate creative options*

Some examples of creative options include:

- Churches mentoring or assisting one another in presbyteries
- Larger churches assisting smaller ones
- Growing congregations lending leaders or offering training to developing congregations. (Boarding House and Greenhouse Ministries — Presbytery of East Toronto)

Describe the scenario.

Based on one of the above options or one you have created, establish a plan to realize your goals and dreams for your church.

Discuss:

- What new things have we learned about our community? About ourselves? About God?
- What new things have we learned about people's needs?

Pray together, asking for God's guidance as you plan how your church will develop a response out of this learning experience.

For a list of other options go to [www.congregationalresources.org/bullardT9.asp](http://www.congregationalresources.org/bullardT9.asp) and click choices in the left margin.

## STAGE 3 — IMPLEMENTATION: ACTING ON THE PLAN

At this stage, goals and objectives have been chosen and an action plan has been formed. The planning committee has completed its work and now entrusts it to the session for implementation. This is why it is vitally important for the session to have ownership of this process from the beginning. It is the role and function of the session, working indirectly or directly with presbytery, to ensure that the plan is put into action. See Appendix C: *Presbytery's Role in the Planning Process*.

As the session gives leadership to the congregation in carrying out its action plan for ministry, it must be aware that all such plans involve some form of change and risk. They all have costs — emotional (feelings and sentiment), spiritual (religious and theological), physical (time, energy and space) and financial (stewardship of money) — associated with them. As noted earlier, the major reason why churches fail to implement plans they have formed are the costs associated with doing so. Sessions must be attentive to the congregation as it takes the next steps, seeking to ensure that the people receive the combination of nurture, support and challenge they need to make the transitions they have chosen.

### On with the Plan!

Implement the action plan that was formed based on the information gathered and analyzed in stage 2.

Pray together, asking for God's guidance as you move forward in faith.

## STAGE 4 — EVALUATION

The church planning process often breaks down because it neglects to include the monitoring and evaluation of the plan. Every plan has a shelf life and the plan's effectiveness needs to be reviewed regularly. During the planning process, hold quarterly review meetings. Questions may be asked at congregational meetings and presbytery visits. Have the session, planning team or presbytery visitation team tabulate the responses to the questions and present the results to the congregation.

The following questions will assist congregations in evaluating whether their plan has been successful in its intended pursuit and how it needs to be changed, modified, or replaced.

### Evaluation Questions

#### *General*

1. What does your congregation want to be remembered for?
2. Are we missing anything in our plan?
3. For whom does this church exist? (e.g. for Christ, members, the unchurched, everyone)
4. What do these groups of people want from the church?
5. What are their needs, wants and aspirations for the church?

#### *Mission statement*

6. What is your congregation's mission statement?
7. Is it longer than one sentence? If so, can it be shortened?
8. Is it well known and followed in your church?
9. Is it current?
10. Is it clear and easy to understand?
11. Is it working?
12. Does it need adjusting?

#### *Vision statement*

13. Does your congregation have a vision statement?
14. Can you repeat it?
15. Are there more than three to five points?
16. Do people in the congregation know it and live it?
17. Is it working?
18. How does it need adjusting?

#### *Congregational plan*

19. What is our congregation's plan?
20. Are you achieving the goals of the plan?
21. Do the goals need adjusting?

#### *Summary*

22. What trends do you see?
23. What have you done well as a congregation?
24. What areas need improvement?

## Statistical Evaluation

*Compare all figures to the previous year's figures.*

Average worship attendance, including children: \_\_\_\_\_

Number of children in church school: \_\_\_\_\_

Number of Baptisms: Adults \_\_\_\_\_

Children \_\_\_\_\_

Persons added to roll: Profession of faith \_\_\_\_\_

Session \_\_\_\_\_

Persons removed from roll: Certificate \_\_\_\_\_

Death \_\_\_\_\_

Revision of roll \_\_\_\_\_

Total adherents under pastoral care: \_\_\_\_\_

Total funds received from all sources: \_\_\_\_\_

Total expenditures: \_\_\_\_\_

Percentage of budget dedicated to mission purposes beyond local congregation \_\_\_\_\_

### In God's Presence

We review ministry in God's presence, prayerfully opening ourselves to God's guidance. How are we doing? Are we getting there, nearing our destination? What are the signs of grace, the occasions and interactions and happenings that reveal that the Spirit of God has been moving among and through us? Let us celebrate them.

In what ways have we quenched the Holy Spirit, choosing anxiety and familiarity instead of stepping out in faith? Let us ask forgiveness from God and one another, and recommit ourselves to the journey.

We will ask these questions recognizing that our plans are not engraved on tablets of stone. What sense do we have that God is calling us into a different direction? Let us redraw the map and move forward.

### Celebrate!

Celebrate the grace of God and the mission and ministry of your church.

Make a list of the accomplishments that have happened during the planning process. This will remind people to be positive about their faith and their church and it will identify the work and ministries that otherwise go unnoticed. Give thanks to God!

## APPENDIX A

### 1. Congregational Questionnaire

1. What do you value the most about attending your church?
2. What are your needs, wants and aspirations for your church?
3. What do you believe God is calling your church to be?
4. How long have you attended?
5. What made you choose this church?
6. What keeps you returning week after week?
7. What are the things that are done well at your church?
8. What challenges do you see your church facing?
9. What things need improving?
10. If there was one thing you could change about your church what would it be?
11. How can you participate in this change?
12. Where would you like to be as a church in five years?

## 2. Life Cycles of Congregations

Like every living organism, a church has a life cycle. There is a specific time when churches are born, form, become stable through growth, experience decline and die.

Identify the life cycle stage of your individual congregation. This can be done by referring to the book *Can our Church Live?* by Alice Mann (The Alban Institute, 1999). In her book, Mann asks three questions of purpose and identity, the “formation questions,” which relate to each stage of a congregation’s life cycle:

1. Who are we (especially at a faith level)?
2. What are we here for?
3. Who is our neighbour?

Congregations engaged in redevelopment find substantially new answers to these questions. These processes are identified below with a star ★. They are in italicized type in the description of the life cycles of congregations that follows. These processes indicate stages of renewal, revitalization and redevelopment within the life cycles of churches.

### Description of Life Cycles

Read the descriptions of the life cycles listed below and then identify where you see your church in the life cycles.

- **Birth:** A new church plant, first worship services, recognition of congregation by the presbytery.
- **Formation:** Immediately after the birth phase, struggle with questions of identity and purpose. Who are we as a congregation? What are we here for? Who are we to serve?
- **Stability:** period of fruitful and stable ministry
  - ★ *Ongoing renewal when stability is drifting toward stagnation. Congregations will want to take a fresh look at the three formation questions.*
  - ★ *Revitalization in the early stages of decline when there is still substantial vitality present that can be refreshed and refocused.*
- **Decline:** drop in attendance and financial giving and decline in energy are no longer seen as just temporary blips on the congregation’s radar screen.
  - ★ *Redevelopment when a congregation has been in decline for years or decades. The farther congregations slip into decline the more energy it will take to recover.*
- **Death:** this process can often take years or decades.

### Planning Resources

The planning process can be approached in many ways. Outlined below you will find examples of planning resources that use different perspectives, along with a brief explanation of each. The church leader should find the one that best addresses his or her situation.

The most comprehensive overview of the Strategic Planning process that we have come across is *Holy Conversations*, written by Gil Rendle and Alice Mann, Alban Institute 2003. This book is rich in resources, exercises and lists of questions. It is not just about planning but about congregational development and the dynamics of congregational life.

- Resources #1,7,8 and 10 are based on a systems thinking perspective. For more information about systems thinking and congregations go to: <http://www.presbyterian.ca/evangelism/CongregationalAwarenessStudies.pdf> or page 6 *Congregational Awareness Studies* and <http://www.presbyterian.ca/evangelism/congsyst.html>
- Resources #2 and 3 come from a church health perspective.
- Resource #4 is best suited for smaller churches and shares a discernment perspective.
- Resources #5 and 6 reflect a church growth emphasis.
- Resource # 9 is a strategic mapping model aimed at postmodern Christians.
- Resource #11 was the strategic planning tool written for the 115th General Assembly (1989) of The Presbyterian Church in Canada.
- Resource # 12 is written from a personal leadership perspective.
- Resource #13 is a model adapted from the not-for-profit sector.

Congregations engaged or stuck in severely divisive conflict need to resolve or manage these issues before they begin the planning process. It is vital to resolve major outstanding issues before planning for the future. Churches engaged in moderate levels of conflict may find the planning process a means to work through issues.

### 1. Twelve Keys to an Effective Church

*Kenon Callahan, Jossey-Bass Publishing*

Ken Callahan is a church consultant who has spoken to 75 Canadian Presbyterian congregations who attended Stewards by Design conferences. His approach is regarded as one of the most useful and comprehensive long-range planning processes available. His program for church renewal outlines twelve essential characteristics of growing and healthy churches. They are: specific concrete missional objectives; pastoral and lay visitation; corporate, dynamic worship; significant relational groups; strong leadership resources; streamlined structure and solid, participatory decision-making; several competent programs and activities; open accessibility; high visibility; adequate parking, land and landscaping; adequate space and facilities and solid financial resources.

The strength of Callahan's model is its missional focus. He challenges churches to look beyond themselves to their communities and to create mission opportunities. The key to achieving congregational renewal is using congregational strengths to overcome its weaknesses and to work smarter not harder. While these 12 characteristics contribute to successful churches, generally speaking if churches do any nine of them they will grow.

The workbook offers practical instruction to work through the four stages of strategic planning:

1. Developing a realistic assessment of your church's present standing and stature
2. Choosing the primary direction for your future
3. Assessing your strengths in light of the 12 central characteristics
4. Selecting the central characteristics, the key objectives and timelines that will advance your church's future.

This book is suitable for churches interested in discovering their mission and vision from a systemic perspective. This approach recognizes the interconnectedness of the individual part; in this case, the twelve keys to successful ministry and mission.

### 2. Natural Church Development

*Christian Schwarz. To order, call 1-800-804-0777*

Natural Church Development approaches church growth through church health.

It is based on the research of German theologian Christian Schwarz, who examined the causes of church

growth in some 1,000 churches world-wide. The results of his work are contained in this book. He discovered that church growth is related to church health in eight essential areas: empowering leadership, gift-oriented ministry, passionate spirituality, functional structures, inspiring worship, holistic small groups, need-oriented evangelism and loving relationships.

A separate kit is available comprising one questionnaire for pastoral staff and 30 for active church members. The strengths and weaknesses of your church are compared to the eight essential ministry areas he identifies and measured against a database compiled by other churches. Schwartz makes suggestions for developing action plans to improve your church's areas of weakness.

It is important to note that this tool is not an analysis of the minister. It aids in evaluating the various ministries within the church in order to identify and overcome weaknesses.

### 3. The Purpose Driven Church

*Rick Warren, Zondervan, 1995*

Rick Warren is the founding pastor of Saddleback Church in Southern California, one of the largest churches in the U.S. He believes that growth is natural in a healthy congregation. He notes a change in focus from church building programs to a people-building process. From his evangelical perspective, he believes that all churches are driven by something — tradition, programs, personalities, events or building. Healthy churches are driven by purpose. He believes that a healthy church is built around five New Testament purposes that Jesus gave to the church. These are: to grow warmer through fellowship; deeper through discipleship; stronger through worship; broader through ministry; and larger through evangelism.

The book is easy to read and takes you through the step by step process of becoming purpose driven.

Warren raises the following questions:

- What is the purpose of your church? What drives it toward this purpose?
- Who is our master?
- What is our message?
- What is our motive?

Secondarily are these questions:

- Who is our market?
- What are our models?
- What is our method?

### 4. Discerning Your Congregation's Future

*Roy Oswald & Robert Friedrich, Alban Institute, 1997*

This book was written by Roy Oswald, a senior consultant with the Alban Institute, and Anglican priest Robert Friedrich. It is intended for congregations that want to discern a new direction and stop drifting aimlessly. It is not based on the belief that the leader needs to have and to impart a vision to the people.

Instead, it places the whole congregation in the centre of the visioning process. It outlines a process for identifying a congregation's vision that is the result of a grassroots process which is mutually developed and owned both by church staff and laity. It relies heavily on prayer, the study of scripture and spiritual practices. Through this process a congregation will have a deeper understanding of its past and a clearer view of the present which can help to define a vision for the future.

Each chapter has insightful, practical suggestions aimed at facilitating the process. These include: discernment, theology and prayer, ministry assessment, historical reflection, norms identification, prioritizing goals, congregational meeting and developing a mission statement.

This is not a simple process to follow nor is it a quick fix. It involves a great deal of time, energy and prayer. Church leaders may adapt parts of this process for their own congregational situation and create a process that is specific to their community.

This book is suitable for smaller congregations who are capable of achieving a shared vision and who have 125 or fewer attending worship.

### 5. The Church Growth Handbook

*Bill Easum, Abingdon Press, 1996*

There is no single pill that will cure every church growth problem. There are, however, some principles that apply to many common situations. In this book, respected church strategist Bill Easum offers 20 principles for church growth.

He enlarges upon the following 20 principles:

- Growth is not concerned with numbers, but with meeting the needs of the people.
- Growth occurs when people are given a wide variety of choices.
- Growth occurs when people are matched with their skills.
- Growth does not dictate that more people will become inactive.

- Growth provides a wider outreach to people in need.
- Growth need not be hampered by participation in the public arena.
- Growth will occur when worship is intentionally emphasized.
- Growth usually occurs with the addition of each new morning worship service.
- Growth is directly related to the leadership strength of the pastor.
- Growth is directly related to the attitude of the paid staff.
- Growth is directly related to the unpaid staff's perception, rather than the reality of the congregation's size and ability.
- When 80 per cent of any space is in use, it is time to start making plans for more space.
- Growth is encouraged when parking is adequate.
- Growth can occur even though a church cannot afford to build.
- Growth can occur without merely transferring members from one church to another.
- Growth almost always occurs when a church is friendly towards visitors.
- Honestly asking for money encourages growth.
- Long term growth needs a solid foundation.
- Regular strategic planning is necessary for healthy growth.
- It takes more effort to implant change than to maintain the status quo or exercise veto power.

The Ministry Audit/Review at the back of the book makes the 20 principles in this book accessible and effective. This tool provides the framework to do congregational strategic planning, including discerning congregational mission and vision. It also helps to identify problem areas and points out opportunities for solutions.

This exercise can provide your church with the data and critical assessment skills needed for planning ministry which may result in church growth.

This book is suitable for congregations serious about evaluating and improving their ministries.

## 6. The Complete Ministry Audit: How To Measure 20 Principles for Growth

*M. Easum, Abingdon Press, 1996*

This book is best used in conjunction with Easum's *The Church Growth Handbook*, which is reviewed above. "It is designed to help you make assessments and improve-

ments in your congregation's ministries ... the process is more a diagnosis than an evaluation." The objective is not to make a value judgment about a congregation, but to diagnose the problems experienced by congregations and to prescribe models of ministry in response.

Study guides and questionnaires for staff and church members are included. There are questions and evaluations which focus on Easum's 20 principles. The process ends with strategic recommendations that can help move the congregation towards growth and health.

This book is suitable for congregations during pulpit vacancies and congregations interested in renewal through self-analysis. Best used in conjunction with *The Church Growth Handbook*.

## 7. Studying Congregations: A New Handbook

*Editors: Nancy Ammerman, Jackson Carroll, Carl Dudley and William McKinney, Abingdon 1998*

This is not a simple how-to book but a comprehensive and systemic approach to congregational development that provides a framework and analytical tools to understand the nature of congregations. Written by a group of church sociologists, it is theologically and sociologically rooted and has an academic approach to comprehending congregational life. This workbook emphasizes assisting church leaders in congregational self-understanding. Significant effort is made to help churches discover their identity, and methods are suggested from which strategic plans can be made. This workbook contains a chapter on leadership which is one of the most pointed and informative found anywhere. It includes a process for creating congregational vision.

A standard demographic parish profile inventory is included as an appendix. This resource provides many theological and sociological insights into congregational life, but its purpose is not to provide practical suggestions for the implementation of ministry.

This book is suitable for any Christian who is interested in studying the dynamics of congregational life. It is also an excellent resource for any church leader beginning a new pastorate.

## 8. Understanding Your Congregation as a System

*George Parsons and Speed Leas, (Senior Consultants) Alban Institute, 1993*

This is a congregational assessment manual based on systems thinking theory that can be used as a CAT scan

for your church organization. It is an evaluative tool to be used by congregations facing change. The Congregational Systems Inventory helps you look at your church from the interrelated perspectives of authority, strategy, process, pastoral leadership, relationships, lay leadership and learning. It suggests strategies to help your church move forward or get unstuck.

You need to have a knowledge of systems thinking to fully understand this planning process and to implement these strategies.

## 9. Strategic Mapping and Futuring

*Excerpt from The Easum Report,  
www.easumbandy.com/mapping.htm*

Creative thinkers Bill Easum and Tom Bandy offer an alternative to congregational strategic planning that they call strategic mapping. They believe that we live in a crack in history. Everything, even change itself, is changing. Instead of slow, evolutionary change, we are experiencing a world of random, episodic change. By the time we adjust to the changes, the world has already changed again. In such a world the ability to think strategically, instead of blindly following the status quo, is essential to leadership.

In a crack in history, strategic mapping rather than strategic thinking or strategic planning is the way to the future. Strategic mappers, like Lewis and Clark or the Star Trek generation, are wandering through an unknown wilderness, charting courses where no Protestant has been before. Contrary to our computer generated maps, their maps are simple and are added to and enhanced by those who come after them.

Strategic mapping is not a linear extrapolation of the past into the future. Strategic mappers care more about where they are going than where they have been. Their focus is on the future and how present actions can actually be a partner in making the anticipated future a reality. The basic question strategic mappers ask is “What must we do today to cause the future to be what God wants it to be?”

Strategic mapping avoids detailing the “how” of strategic planning. The details about how to get to the future are best left as broad and as flexible as possible to allow for the various gifts among the congregation as well as the shifts that are occurring along the crack in history.

### Strategic mappers ask the following questions.

- Is most of our time spent on the needs of the community instead of the needs of the congregation?

- Of the time we spend thinking about the needs of the community, how much of it is spent considering how ministry will be different ten years from now versus how to improve our present ministries?
- Of the time we spend thinking about the needs of the community, how much of it is spent in establishing alliances and networks that will help us be ready for future needs?
- Does our church do most ministries differently than most other churches in our denomination?
- What is impossible today that, if it were possible, would change the way we minister to people?

### Seven mapping steps that can lead to the intersections of the future.

1. Let go of the past and the present and suspend all judgment.
2. Find a group of people like yourself who will admit that very little works like it used to.
3. Establish the meta rules.
4. Develop a set of clues to the future.
5. Ask the right questions.
6. Begin mapping your way to the future.
7. Avoid allowing the process to become too detailed and drawn out.

See also: *Moving off the Map*, Thomas Bandy, Abingdon Press, Nashville, 1998

## 10. Quest for Quality in the Church — A New Paradigm

*Ezra Earl Jones, Discipleship Resources, Nashville, 1993*

United Methodist Denominational executive Ezra Jones believes: “The system is designed for the results it is getting. If you want different results, you will have to redesign the system.” Quality itself is systemic. A quality church produces quality in outreach, worship, nurture and ministry. It:

- Is clear about mission. It is motivated by a compelling vision of transcendent worship and neighbourly caring.
- Pays attention to all the parts and processes that make up the organizational system and relates those parts appropriately.
- Leads the church to produce the vision even as it continually pushes out the visions of new possibilities.

In this book he discusses the importance of clarifying congregational mission, vision, systems thinking and leadership. It encourages church leaders:

1. to clarify the aim.
2. to design a system to reach the aim.
3. to institute leadership to manage the system to reach that aim.

## 11. From Vision to Reality — a guide to strategic planning in congregations

*Howard E. Gillies, The Presbyterian Church in Canada 1989*

Responding to a major report on strategic planning made to the 115th General Assembly (1989) this monograph was written by a Canadian Presbyterian elder to assist congregations in the area of planning. Sadly, Mr. Gillies died shortly after the publication of this resource.

This model seeks to answer five key questions:

1. What does Christ require of the congregation?
2. What should the mission of this congregation be?
3. What are the major strategic issues facing this congregation?
4. What new conditions, trends and realities are facing this congregation that will impact its life and ministry?
5. What vision does this congregation have of itself ten years from now? What should be the ideals to achieve under God's leading?

Also included is the vision of The Presbyterian Church in Canada, adopted by the 115th General Assembly in 1989. This document focuses more on long term planning (10 years) but can be adapted for a shorter planning window. Longer term planning is now thought to be three years. Copies are available from Grace-ann McIntyre, 50 Wynford Drive, Toronto, Ontario, M3C 1J7.

## 12. The Path: Creating your Mission Statement for Work and for Life

*Laurie Beth Jones, Hyperion Press, New York*

This national bestselling book is written by Christian author Laurie Beth Jones. It offers a practical and easy-to-follow method of developing a mission and articulating a mission statement. According to Jones, a good mission statement will be inspiring, exciting, clear, true and engaging. Jones believes that a mission statement must be:

- one sentence long
- understood by a 12-year-old
- able to be recited from memory at gunpoint.

**A four-step process is outlined:**

1. Acknowledge that every mission requires action. Mission statements must use action words (verbs). Choose three verbs that most excite and inspire you,

ones that have the most meaning and power for your work.

2. Identify your core values. A core value is a concept or principle that you would be willing to die for. Write down this core value.
3. Check to see if your mission statement is concise, clear and reasonable. Ask family, friends, members from your church.
4. Identify your tribe: Who do you want to serve? For churches, this could be people in and outside the church, or only people outside of the congregation.

The final process unites the verbs or the action of the mission statement with a core value and is directed toward or is engaged with a tribe.

This book is suitable for all church leaders and every Christian who is interested in developing a personal mission statement. Discerning personal mission can be a first step to discerning a sense of congregational mission. This approach can be used by congregations to discern their mission and create a mission statement.

## 13. The Drucker Foundation Self-Assessment Tool — Process Guide

*10 Participant Workbooks*

*Jossey-Bass Publishers, 1999, www.drucker.org*

This planning tool from Peter Drucker, the guru of *Not for Profit Organizational Thinking*, helps church leaders learn more about themselves. It is a three phase process of preparing for self-assessment, conducting the self-assessment and completing the plan.

Drucker also believes that churches are the best examples of not-for-profit organizations. Having said this, churches that use his model need to Christianize the language and adapt the theory into their own congregational contexts. The strength of this model is the focus on having a clear and defined sense of mission. It challenges church leaders to think in terms of customers — those outside and those inside the church — to evaluate their success or performance in trying to reach their mission.

According to Drucker, mission is why we do what we do. It is our reason for being and says what, in the end, we want to be remembered for.

For example, our mission is “To know Christ, and to make Him known.” or, “To live, love and share together through the teachings of Jesus Christ.”

Vision statements give direction and are prescriptive in nature. Like mission statements, they need simple action language and short sentences and must be as specific as possible. Visions need to be descriptive, written as a

sentence or bulletin point, not as a creed. They should be clear and simple so that even children may understand them. Speak about your congregation's dreams and wants. Begin by asking these basic questions:

1. We want to become \_\_\_\_\_, and our dream is to be \_\_\_\_\_.
2. Where do you think God is calling your church in the future?
3. What type of community do you want to be?

### **A Visioning and Planning Process based on Drucker's model**

What end do you want to achieve and what means should you use to get there? Peter Drucker's approach to vision is helpful in assessing the situation. He asks these questions of not-for-profit organizations: What is your mission? Who is your customer? What does the customer value? What are your results? What is your plan?

Begin with a full day of congregational self-assessment with everyone present. Devote an hour on each of the four steps, with breaks for refreshments and fellowship. Pray with thanksgiving before and after each session. Have the leader make notes of pertinent points after compiling the data. The visioning session takes place one month afterwards, beginning with step five and the vision casting process.

Vision involves making sense of and giving direction to what you value as a people of God. It is critical to overcome negatives with positives, and to recognize your church's strengths in order to overcome weaknesses.

#### **Step One**

Begin by asking the following questions. What is your church's reason for being? What is its purpose? What do we want to be remembered for? Start the vision casting process by asking what everyone values most about their church experience.

Use this process to identify your church's **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats — the SWOT process of strategic planning that determines your core issues. Base your conclusions on your local congregational culture. Where are we now? What is our history? Why are we who we are? Examine your congregational systems — what processes are in place and how do they affect how you plan? Do the various decision making processes and systems help you achieve your purpose?

Try drawing a chart on a large piece of paper and list your church's strengths, weaknesses, opportunities and threats on each of four quarters.

#### **Step Two**

Examine your community context: What are the community's greatest needs?

What is the largest effect the community has on your church? What does the community expect from you? What can you learn from other churches in your community? What unique ministry can you provide that no one else does?

Identify your church's mission field.

Who are your customers? Who must the church satisfy in order to achieve results? Whose lives are changed through the church's work? List these on separate pieces of paper.

#### **Step Three**

Examine what your customers value. What is important to them? What are their spiritual, physical and psychological needs? What do they want? What do they long for? What do they dream about?

Identify your church's core values and dreams. Write them down in point form and match them with those of the customer.

#### **Step Four**

Evaluate your performance. How are you doing? If your church left the community tomorrow, what would people miss the most? How has your church changed people's behaviour? Their life circumstance? Their spiritual, mental and physical health? Their faith development, discipleship? How do you celebrate your successes? How do you learn from your failures?

Discuss the difference your church is making in your community.

#### **Step Five**

What's your plan? How do you get there?

Based on your self-assessment, what are the main issues to be addressed? Identify a set of three to five goals that define the church's fundamental long-range direction.

Are they measurable and specific?

Is the church committed to implement these plans financially, emotionally, physically and spiritually?

With the insights and information gained from this process, you can begin the process of discovering God's vision for your church.

## APPENDIX C

### **Presbytery's Plan for Presbytery**

In the planning process, it is important that the presbytery think and act as a player on the team for Christ and for The Presbyterian Church in Canada in its specific geographic area. For their own planning, presbyteries may choose to adapt the tools in this document designed for use by congregations. Assess the strengths of the team. Are there areas of duplication? Are there areas that are not being served? What are the team's weaknesses?

Draw the geographic boundaries of your presbytery and identify the location of each Presbyterian church. Determine if there are barriers that divide your presbytery. These could be natural like rivers or mountains, cultural or ethnic, social like urban and rural, or economic. What has your presbytery done, or what will it do, to overcome these divisions?

Identify the potential options or choices for each congregation within your bounds and review the scenario of the chosen action.

The presbytery can assist congregations in the planning process by helping them to use the question and answer process provided in the Evaluation Stage of this resource (page 50).

### **Celebrate!**

Celebrate the grace of God and the mission and ministry of your presbytery. Make a list of the accomplishments that happened during the planning process. This will remind people to be positive about their faith and their presbytery and it will identify the work and ministries that otherwise go unnoticed. Give thanks to God!



# **PRIMARY RESOURCES** *for Chapter 4*

# Consultants and Resource and Training Centres for Conflict Resolution

Presbyteries and sessions selecting consultants are advised to exercise a thorough level of discernment, as for calls and appointments, including the checking of references, so that the individual who is best suited to serve in the particular context can be chosen.

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**Richard Blackburn, Bob Williams, Marty Farahat**  
**Lombard Mennonite Peace Centre**

1263 S. Highland Ave.,  
Suite 1N  
Lombard, IL  
60148-4527

Tel. (630)627-0507  
Fax (630)627-0519  
Email: Admin@LMPeaceCenter.org  
Web: LMPeaceCenter.org

**Types of Service:**

- Consultancy
- Training
- Resources

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**John Bryan**  
**BWB Consultants Ltd.**

366 Adelaide St. W.  
Suite 606  
Toronto, ON M5V 1R9

Tel: 416-920-3812  
Fax: 416-977-1704  
Email: jtbryan@interlog.com

**Types of Service:**

- Consultancy
- Training

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**Nan Cressman**  
**Conciliation Services Canada**

767 Lakeshore Drive,  
RR #1,  
Desbarats, ON P0R 1E0

Tel: 1-866-782-0287  
Fax: 1-705-782-6276  
Email: cressman@soonet.ca

**Types of Service:**

- Consultancy
- Training
- Organizes a week-long continuing education event with an outside facilitator each June at Conrad Grebel College in Waterloo

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**Speed B. Leas, Roy Oswald, Gil Rendle**  
**The Alban Institute**

2121 Cooperative Way  
Suite 100  
Herndon, VA 20171

Tel: 1-800-486-1318  
Fax: 703-964-0370  
Email: webmaster@alban.org  
Web: www.alban.org

**Types of Service:**

- Consultancy
- Training
- Research
- Resource publication

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**Bill Lord**

Guelph, ON

Tel: 519-823-4479

**Types of Service:**

- Consultancy
  - Training
- 

**Qualified interim ministers****Interim Ministry Network**

5740 Executive Drive

Suite 220

Baltimore, MD 21228

Tel: 1-800-235-8414

Fax: 410-719-0795

Email: [info@interimministry.org](mailto:info@interimministry.org)

Web: [www.interimministry.org](http://www.interimministry.org)

**Types of Service:**

- The Interim Ministry Network maintains a list of ministers of word and sacraments in Canada and the United States who have completed training in interim ministry. Some of these individuals would be equipped to serve as consultants, trainers or coaches.
- 

**John Savage and others****L.E.A.D. Plus**

6300 Powers Ferry Road

Suite 600-218

Atlanta, GA 30339

Tel: 770-852-7030

Web: [www.leadplus.com](http://www.leadplus.com)

**Types of Service:**

- Consultancy
- Training
- Resources

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**Peter Steinke****Healthy Congregations**

P.O. Box 300939

Austin, TX 78703

Tel: 512-342-8684

Fax: 512-527-9827

Email: [hcongregations@jump.net](mailto:hcongregations@jump.net)

Web: [www.healthycongregations.org](http://www.healthycongregations.org)

**Types of Service:**

- Consultancy
  - Training
  - Resources
- 

**Synod Staff (PCC)**

Contact your synod office for details.

**Types of Service:**

- Some synods have staff working in conflict resolution and crisis intervention.

# Framework for Understanding Conflict

What are the sources or roots of a conflict and what dimensions of the situation contribute to it? We understand that conflict can arise from any combination of three sources: individual persons, the patterns of behaviour within the community (systems), and problems.

## DIMENSIONS, SOURCES OR ROOTS OF CONFLICT

### A. Persons

1. beliefs/intentions
2. behaviours
3. relationships

### B. Systems (patterns)

1. formal structures
2. tacit (unspoken) structures

### C. Problems to solve and problems to manage

1. problems to solve: Solving a problem is directed towards choosing a course of action or choosing between many (or two) solutions with a view to fixing something that is broken or meeting a need.
  - problems with more than one solution
  - dichotomies (only two mutually exclusive solutions; each one makes the other impossible)
2. problems to manage
  - polarities: two opposite realities are *both* needed for an effective response. Managing a polarity requires continually moving between the poles and finding the right emphasis at any given time.
  - values: conflicts over values are a special case of problems to solve. Although the people involved may have many choices available, their commitment to a particular set of values may be so deeply engrained as to be beyond their capacity to change.

## INTERVENTIONS TO DEAL WITH CONFLICT

### A. Persons

- faith development
- fear reduction
- ‘encountering’ irrational or distorted ideas and beliefs
- training/coaching
- venting, catharsis, expression of feeling
- confession, forgiveness, agreement on new ways to be in relationship
- communication skill training
- helping parties to meet interpersonal need

### B. Systems (patterns)

- making the unconscious conscious; identifying patterns and tacit contracts that keep the patterns going
- interrupting the interaction patterns
- bringing in a consultant or establishing a team to help the congregation keep working in the new preferred interaction patterns

### C. Problems

1. Problems to solve
  - Problems with more than one solution:
    - collaborate
    - negotiate
    - arbitrate (arbiters, courts, votes)
  - Dichotomies (only two mutually exclusive solutions):
    - arbitration
    - voting
    - use of authority
2. Problems to manage (see separate notes on polarities)

## PROBLEMS TO MANAGE: POLARITIES

Some problems can be solved by making a decision. The group chooses 'option A' and then acts to put 'A' in place. Other challenges will likely arise along the way, but these do not require a continual remaking of the initial decision.

By contrast, some problems can never be solved, in the sense of 'once and for all'. Some problems must be managed. In polarities, two opposite realities are *both* needed for an effective response. As soon as one reality is chosen, a healthy tension pulls back towards the benefits that the other pole can offer. *Managing a polarity* requires continually moving between the poles and finding the right emphasis at any given time.

### Polarity

- two options that are opposites but interdependent; when you chose one, you are missing the value of the other (i.e. you immediately begin to feel the need for the other).
- a piece of reality with tension built into it.
- analogous to breathing: as soon as you inhale, you develop the need to exhale, and so on; polarities are dynamic, and require movement.

### Examples of polarities

- homeostasis vs. change
- structured vs. unstructured
- open options vs. decided
- dimensions of congregational life (polarities) that are studied in Alban's *Congregational Systems Inventory*:
  - for strategy, planned vs. spontaneous
  - for authority, concentrated vs. dispersed
  - for information sharing and decision making, mandatory vs. discretionary

- for leadership (i.e. the ability to generate intended change in congregation) provided by the pastor, managerial vs. transformational
- for relatedness as congregational members work together, collegial vs. individual
- for leadership (i.e. the ability to generate intended change in congregation) provided by the lay people, managerial vs. transformational
- for the congregation's orientation toward learning, building on past successes and current strengths vs. learning from that which is new and untried

### Examples of non-polarities

- whether to have one worship service or two, as congregation grows in size
- whether to build light or heavy cars
- whether to study piano or organ

### Managing a polarity

- requires managing a tension between two interdependent realities

### Strategies for managing polarities

- make the unconscious, conscious
- choose/develop a vision
- capitalize on environmental forces
- interrupt interaction patterns
- transformational leadership
- disturb the equilibrium
- change through education or training strategies

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# Levels of Conflict

Level	Major Objective of Protagonists	Dynamics	Interventions
I: Problems to Solve	to solve the problem	<ul style="list-style-type: none"> <li>• real differences</li> <li>• clear language, focus on problem</li> <li>• openness, risk taking between parties</li> <li>• fix? rational methods + solutions</li> </ul>	<ul style="list-style-type: none"> <li>• work at lowest levels of organization</li> <li>• collaborate</li> </ul>
II: Disagreement	to come out looking good	<ul style="list-style-type: none"> <li>• language: generalizations + higher emotion</li> <li>• start looking for help</li> <li>• not all data shared</li> <li>• fix? all must compromise</li> <li>• jokes: hostile edge</li> </ul>	<ul style="list-style-type: none"> <li>• lowest levels</li> <li>• collaborate</li> <li>• teach</li> <li>• foster trust development</li> <li>• encourage expression of feelings in presence of others</li> </ul>
III: Contest	to win	<ul style="list-style-type: none"> <li>• language: perceptual distortion</li> <li>• factions begin to form</li> <li>• personal attacks substitute for problem identification</li> <li>• groups do not talk informally easily</li> <li>• emotional appeals used to influence rational thinking</li> <li>• assumptions about motives of other</li> </ul>	<ul style="list-style-type: none"> <li>• lowest levels</li> <li>• collaborate; then negotiate</li> <li>• use third party</li> </ul>
IV: Fight/Flight	to break the relationship	<ul style="list-style-type: none"> <li>• clear factions, strong leaders; sub-group more important than large</li> <li>• hurt, weaken, punish, humiliate the other</li> <li>• defeating other more important than solving problem</li> <li>• impugn integrity of other</li> <li>• try to enlist outsiders in their cause</li> <li>• issues/causes shift to principles</li> <li>• rejection rituals</li> <li>• try to expel other</li> </ul>	<ul style="list-style-type: none"> <li>• use authoritarian decision modes</li> <li>• rights, rules, fair play</li> <li>• third party coaching + stating positions</li> <li>• allow withdrawal, after win/lose</li> <li>• search for sources of interdependence, super-ordinate goals</li> </ul>
V: Intractable	to destroy the other	<ul style="list-style-type: none"> <li>• parties display selves to outsiders in larger than life terms; part of an eternal cause, unambiguous principles</li> <li>• ends justify means</li> <li>• only option: to continue fighting</li> <li>• ideological organizations</li> </ul>	<ul style="list-style-type: none"> <li>• peacekeeping force or authority</li> <li>• enforced separation of groups</li> </ul>

# Mediation

## What is mediation?

- the process of facilitating dialogue between disputants who are participating voluntarily in a process of solving a problem
- the second step in the process Jesus taught for reconciling (Mt 18:1-20):
  1. informal: A talks to B alone.
  2. mediation: C comes along with A to facilitate the conversation between A and B.
  3. arbitration: A takes the problem to the church.
  4. treat 'as a Gentile and a tax collector': could mean different things in different contexts; could mean excommunication; but must remember how Jesus treated Gentiles and tax collectors (mercy, love, grace).

## The goals of mediation

- to facilitate dialogue between disputants
- to help parties move from personal antagonisms to focus on issues
- to help parties solve their own problem and reach a mutually satisfactory agreement

## The role of the mediator

- to set a positive tone
- to encourage productive communication
- to surface assumptions, feelings
- to define issues
- to point to guiding principles (e.g. interest-based rather than position-based bargaining; direct dialogue)
- to teach/coach effective communication
- to help parties to define and assert interests
- to assist in defining and evaluating options
- in some cases, to provide technical expertise
- to assist parties to build a final agreement

## The process of mediation

1. introduction (explain process, role of mediator, ground rules)
2. story-telling
3. problem-solving
  - note areas of agreement or common concern
  - list issues for discussion
  - generate and examine options for resolution
  - throughout the problem-solving phase, the mediator may need to shift focus back and forth between issues and healing strategies and spiritual ministry.
4. agreement

## When is mediation appropriate?

- Mediation can be effective *for solving problems with many solutions*. It applies in situations where it is reasonable to view *indecision* about an issue as the root of the conflict, and to expect that coming to decision or agreement about the issue will resolve the conflict.
- Mediation requires trust. It is appropriate when there is enough trust between the disputants (or the possibility of developing such trust) that they can engage in a process of problem solving. When levels of trust are high enough that disputants can share all the information they hold, collaboration (mutual problem solving) is possible; when disputants hold back some of the information they hold, negotiation or bargaining is possible.
- Mediation is appropriate when disputants believe (or come to believe) that each may need to shift his or her position somewhat for a solution to be found (i.e. belief that there is some middle ground).
- Mediation tries to deal with the conflict at the lowest level possible, working against the natural inclination of disputants to translate all conflicts into 'values' conflicts (even when the conflict could be worked out at the level of decisions about facts or processes).

**When is mediation inappropriate?<sup>1</sup>**

- as a substitute for therapy or counselling
- to coerce people or events to a desired end
- as a substitute for the proper exercise of authority (e.g. Victim-Offender Reconciliation programs may be effective only after the offender has been found guilty of the crime.)
- when trained mediators are not available
- when power should not be balanced
- when the goal of the dominant group is repression or the goal of the subordinate group is revolution (e.g. Rosa Parks and Birmingham bus company, 1955.)
- when neither collaboration nor negotiation (bargaining) is possible; that is, when solving problems with only two possible solutions or when dealing with problems that cannot be solved, but only managed (e.g. polarities, values conflicts)

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<sup>1</sup> Based on “When To Mediate?”, p. D-27 – 29 in *Mediation Skills Training Institute*.

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## THE PRESBYTERIAN CHURCH IN CANADA

*Calling a Minister: Guidelines for Presbyteries, Interim Moderators and Search Committees*, Life and Mission Agency, 1999.  
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- Charlottetown, St. Mark's
- Dartmouth, Iona
- Dean, Sharon
- Miramichi, St. James
- New Minas, Kings
- Sackville, First
- Saint John, St. John and St. Stephen
- Summerside, Summerside Presbyterian
- Sydney, Bethel

In the Synod of Quebec and Eastern Ontario, responses were received from the presbyteries of Quebec, Montreal, Seaway-Glengarry, Ottawa, and Lanark & Renfrew. We also received replies from the following congregations:

- Athelstan, Athelstan Presbyterian
- Avonmore, St. Andrew's
- Carleton Place, St. Andrew's
- Fort Coulogne, St. Andrew's
- Kemptville, Oxford Mills
- Ottawa, Erskine
- Ottawa, Knox
- Ottawa, St. Andrew's
- Ottawa, St. Stephen's
- Vanleek Hill, Knox

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- Baden, Livingston
- Bramalea, St. Paul's
- Cambridge, Knox Preston
- Cambridge, Knox's Galt
- Conn, Knox
- Elmira, Gale
- Grand Valley, Knox
- Guelph, Westminster-St. Paul's
- Harriston, Knox-Calvin
- Hespeler, St. Andrew's
- Hillsburgh, St. Andrew's
- Horning's Mills, Knox
- Huntsville, St. Andrew's
- Kapuskasing, St. John's
- Kitchener, Doon
- Madoc, St. Peter's
- Mississauga, St. Mark's
- Mount Forest, St. Andrew's
- Nobleton, St. Paul's
- Oakville, Hopedale
- Port Credit, St. Andrew's Memorial
- Sault Ste. Marie, St. Paul's

- Sunnidale Corners, Zion
- Sutton, St. Andrew's
- Toronto, Faith Community
- Toronto, Glebe
- Toronto, Graceview
- Toronto, Melville
- Toronto, Riverdale
- Toronto, St. Andrew's Humber Heights
- Toronto, St. Giles, Kingsway
- Unionville, Unionville Presbyterian
- Uxbridge, St. Andrew's-Chalmers
- Wasaga Beach, Wasaga Beach Community

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- Bayfield, Knox
- Brantford, Alexandra
- Brantford, Knox
- Brantford, Mount Pleasant
- Camlachie, Knox
- Chatham, St. James
- Corunna, St. Andrew's
- Cranbrook, Knox
- Dresden, St. Andrew's
- Exeter, Caven
- Fenwick., First/Rockway
- Fonthill, Kirk-on-the-Hill
- Hamilton, Central
- Hamilton, Chalmers
- Hamilton, Southgate
- Hamilton, St. Columba
- Harrington, Knox
- Listowel, Knox
- London, St. Lawrence
- London, Westmount
- Lucknow, Lucknow Presbyterian
- Monkton, Knox
- Niagara Falls, Stamford
- Petrolia, St. Andrew's
- Sarnia, Laurel-Lea-St. Matthew's
- Sarnia, St. Giles
- St. Catharines, Scottlea
- St. Catharines, St. Giles
- St. David's, West St. Andrew's
- Tiverton, Knox
- Walkerton, Knox

- Windsor, Paulin Memorial
- Windsor, Riverside
- Windsor, St. Andrew's
- Woodstock, Knox
- Wyoming, St. Andrew's

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- Hartney, St. Paul's
- Stonewall, Knox
- Thunder Bay, Lakeview
- Winnipeg, Kildonan
- Winnipeg, St. James
- Winnipegosis, Knox

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- Prince Albert, St. Paul's
- Saskatoon, St. Andrew's

**In the Synod of Alberta & the Northwest**,

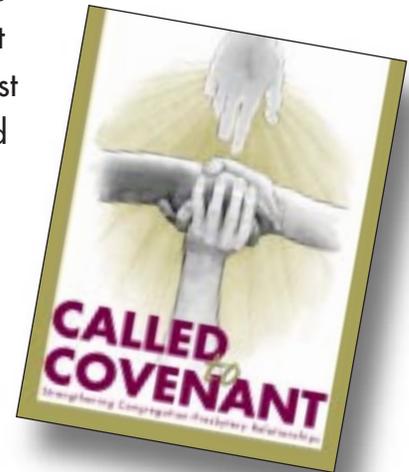
responses were received from the presbyteries of Peace River, Edmonton-Lakeland, Central Alberta, and Calgary-MacLeod. We also received replies from the following congregations:

- Blueberry Mountain, Munro
- Calgary, Grace
- Edmonton, Callingwood Road
- Edmonton, Millwoods
- St. Albert, Braeside
- Sylvan Lake, Memorial
- Wanham, Knox

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- Campbell River, Trinity
- New Westminster, Knox
- Penticton, St. Andrew's
- Sooke, Knox
- Summerland, Lakeside
- Vancouver, Kerrisdale
- Victoria, Trinity

*Called to Covenant* is the result of church-wide consultation into strengthening the relationships between congregations and presbyteries. It examines the covenants that form our identity: the covenant that God has initiated with us in Christ and that places us in covenant relationships with one another. On this foundation, it explores three areas where congregations and presbyteries are most intimately involved: regular pastoral oversight of congregations and ministers by presbyteries, planning of congregational ministries, and crisis intervention by presbyteries. The separate resource book provides practical tools for congregations and presbyteries to use and adapt, as they seek to broaden their understanding and strengthen their support of one another's ministries.



In an increasingly secular and conflicted world, how will the church journey? For more than a decade congregations and presbyteries have raised questions, leading to a national search for a way to be the church in faithfulness to the gospel of Christ. This multi-year process has resulted in the present proposal, *Called to Covenant*. What distinguishes it is its theological orientation around the concept of covenant. The fundamental issue for the church is how we understand and evidence that we belong to a God who has covenanted with us in Jesus Christ, and how we draw implications from this for our individual and collective relationships. Guided by this covenant principle, this resource outlines practical ways congregations, sessions and presbyteries can find disciplined and creative approaches to journeying together as the body of Christ. I believe that it can inspire fresh vision and hope that can make a difference for our denomination.

*Arthur Van Seters, former Principal of Knox College*

The effectiveness of the church's witness depends, in part, on the quality of its inner life. The relationship between congregations and presbyteries especially affects how we are perceived as a denomination, and how we influence the world in the name of Christ. The Life and Mission Agency, presbyteries, congregations, and sessions have been consulting on the quality of our life together for several years. *Called to Covenant* is the fruit of that process. It calls us to a profound respect for the call of God in each of our lives, expressed in a covenantal reality, which impacts both our governance and our personal relationships.

I commend this document to the church as a compendium of ideas and possibilities of how we can live together effectively bearing witness to the good news of Jesus Christ. From this rich smorgasbord, congregations, sessions and presbyteries are invited to engage creatively in dialogue with each other to enhance our life in Christ. I am convinced that we are called to deepen our covenantal relationship with God and with each other. May the Spirit refresh and expand our vision in faith, hope and love.

*Thomas Gemmell, former Principal Clerk*