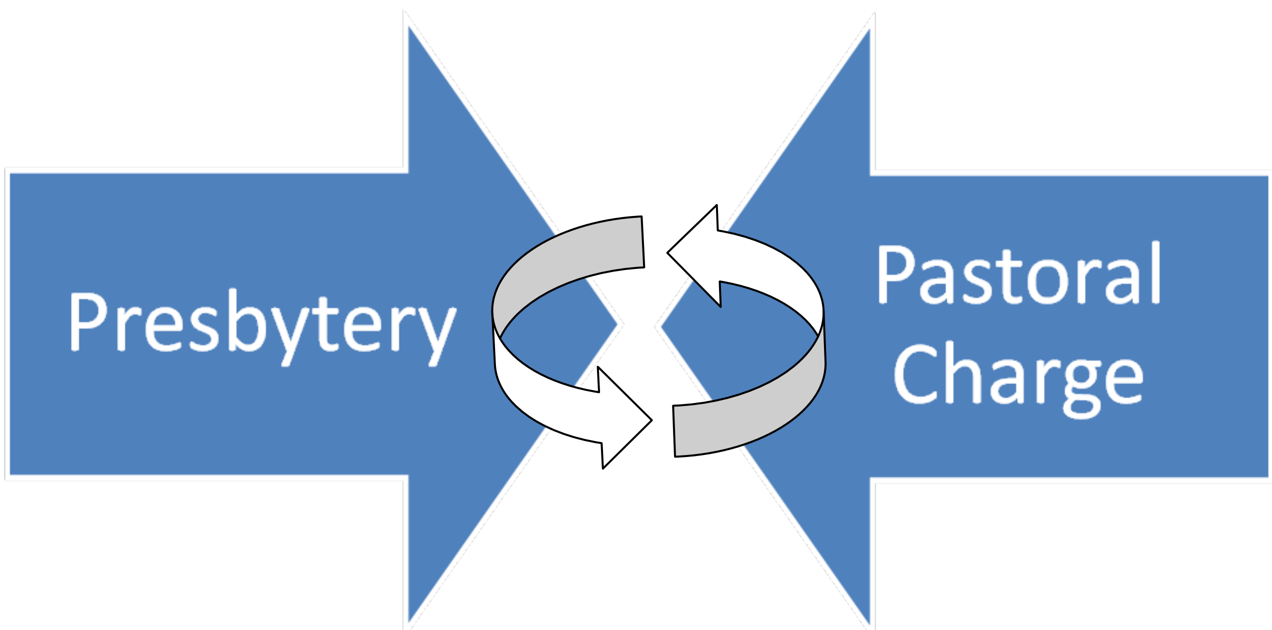
Saskatchewan Conference
The United Church of Canada

Oversight Guidelines

Presbytery Oversight Visits
To Pastoral Charges



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This Oversight Guideline was prepared by a committee of the Division of Ministry Personnel and Education. The members of this committee are Annette Taylor, Brian Mee, Sheila Krueger and Pam Thomas (staff). March, 2009. Thanks to Alberta Northwest Conference and all the presbyteries of Saskatchewan Conference for sharing their Pastoral Oversight Resource with us.

INTRODUCTION

Have you ever heard any of these comments?

- Presbytery doesn't care about us
- Presbytery just wants to tell us what to do
- Presbytery is those people out there somewhere.

Sometimes the covenantal relationship between pastoral charges and the presbyteries of which they are a part becomes strained. Often that happens through lack of communication and lack of understanding, each of the other. The purpose of a pastoral oversight is to build the kind of strong relationships between presbyteries and pastoral charges that are necessary if each is to support the work of the other, both in times of joy and celebration and in times of challenge and difficulty.

To facilitate the **Manual requirement of oversight of pastoral charges** (Section 332, The Manual 2007) and to facilitate this vital relationship-building, each presbytery has a Pastoral Oversight Committee (or equivalent) whose task it is to arrange for teams of presbyters to visit with pastoral charges, to offer sympathetic support, to help with difficult issues, and to create a climate of mutual support and cooperation. These visits happen once every three years. In addition, many presbyteries arrange a visit during the first year of a new pastoral relationship, to offer support in the building of this new relationship, and to assist with solving any problems while they are small, preventing larger and more difficult problems from developing.

What is a pastoral oversight visit?

- A general check-up of the health of the pastoral charge
- An opportunity for the charge to share its celebrations and its concerns with the presbytery
- An opportunity for the pastoral charge to look at its community life, its structure and its mission
- An opportunity for presbyters and members of the charge to come to know one another and to create an atmosphere where the charge knows that it can call on the assistance of the presbytery should it ever be needed

What a pastoral oversight visit is not?

- It is not a review of the effectiveness of the ministry personnel
- It is not a review of the effectiveness of the pastoral charge

This guide is intended to help presbyteries and pastoral charges as they meet so that the visit can be open, supportive and effective, and so that new growth can happen..

PROCESS FOR PASTORAL OVERSIGHT VISIT

A pastoral oversight visit takes advance planning and organization. You have a number of people and groups to visit and these meetings need to be arranged before you arrive in the pastoral charge.

1. **Visit with lay staff**
   It is important to remember that while volunteers and ministry staff are accustomed to evening meetings, support staff may not. If possible, plan to meet with the support staff (secretarial, custodial and music) during their normal working hours.

2. **Visit to the manse (if there is one)**
   A manse is only necessary is the minister is living there**.**
   While it is not your job to inspect the manse (your presbytery will have a Manse Committee whose job it is to do that), it is helpful to have a brief visit to see it. You may hear, in your visit with the minister, concerns about the state of the manse. You may also hear concerns about the state of the manse in your visit with the M and P Committee and/or the congregation and board. It is wise to have seen the house in question for yourself. It is also a good idea to have a tour of the church (note that in a multiple point charge, it may be difficult to visit all the church buildings.)

3. **Visit with the ministry staff**
   You should plan to visit separately with each member of the ministry staff, in a confidential setting (this may be the minister's study or home, or a quiet restaurant or coffee shop some distance from the church) where staff will feel free to raise any concerns. If staff in a team ministry are open to it, you may also want to have some conversation with them together.

4. **Visit with the Ministry and Personnel (M&P) Committee**
   This is an opportunity for you to have conversations about the work of the M and P Committee, and to raise a number of questions.

5. **Visit with the Board(s)/Council(s) and Congregation(s)**

A POSSIBLE AGENDA for your pastoral oversight visit might look like this:

1. **Morning/Afternoon**: in a small charge, afternoon and evening should be quite adequate for your visit. In a larger pastoral charge with a number of staff, you may need the morning as well.
    - meet individually with each support staff. These meetings should be no more than 30 minutes each.
    - Visit the manse (if applicable). This is also a good time to tour the church.
    - In a multiple ministry staff setting, meet individually with each minister. These meetings should be no more than one hour each.

2. **Dinner/supper/the evening meal**: In a single ministry staff setting, you may wish to have your meeting with the minister over the meal. In a multiple ministry staff setting, you may wish to invite the ministers to join you for the meal following your individual meetings with them.

3. **Early evening**: meet with the M and P Committee. This meeting should be no longer than 30-45 minutes.

4. **Later evening (this session should be no longer than an hour and a half) (see page 11 for sample questions)**
    - Meet with members of the board(s)/council(s) and congregation(s) and minister(s).
    - Meet with members of the board, congregation(s) without the minister(s) (omit this section if you have already met with the M and P Committee).
    - Closing comments and prayers.

A FORMAT FOR AN OPEN MEETING

with the Official Board/Council and Members and Adherents of the Pastoral Charge

Should it not be possible for the visitation team to meet with the Ministry and Personnel Committee, then the minister(s) will attend the general meeting and following "Setting the Mood" portion they will excuse themselves. Just as the ministry personnel have had the opportunity of conversation with the visiting team without members of the Pastoral Charge present, this is the opportunity for the members of the Pastoral Charge to be given an opportunity to reflect upon their life and work without ministry personnel present.

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

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

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

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

- **Questions for the Open Meeting with the Official Board/Council, and members and adherents of the Pastoral Charge**
  The members of the visiting team may choose to engage this part of the evening in several ways. A large group setting allows everyone to hear all the comments being offered, however some people feel uncomfortable speaking in a large gathering. Small groups usually get everyone talking, but then it is important to have a time when comments made in small groups are shared with all who are present.
  The questions provided on page 7-21 are suggestions. If the conversation goes in a different direction than what the team has planned, allow some time to see if useful insights emerge. Being open to the flow of the conversation may provide more information about the Pastoral Charge than being tied to the questions.

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

- **Closing**
  Thank the people of the Pastoral Charge for attending the evening, participating in the conversation and for their hospitality.
  The team members may offer a prayer to close the evening in which they call to mind the Pastoral Charge, the Presbytery and The United Church of Canada. A hymn may be sung. A blessing or benediction would be appropriate.

PREPARING FOR THE VISIT

PREPARATIONS BEFORE THE OVERSIGHT VISIT

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

- **The visitation leader,** in consultation with the chairperson of the Official Board/Council, arranges the date, the times, and the places for the visit.
  Once arrangements have been set, **the visitation leader** sends a Pre-Visit letter (see Appendix II) to each of the ministry personnel and to chairperson of the Official Board/Council confirming the arrangements and requesting that together they ensure the following is attended to on the Pastoral Charge before the visit:

  - The visit and its purpose are announced to the congregation(s) in the worship bulletin for at least two Sundays before the visit. (See Appendix I for a sample bulletin announcement.)

  - Meetings with the ministry personnel, staff people, Ministry and Personnel Committee and the congregation are confirmed.

  - It is helpful if the team receives as many of the following resources as possible: (*provided by the Pastoral Charge, or the presbytery)*
    - a copy of the latest Annual Report
    - the mission statement and constitution
    - copies of Pastoral Charge policies and procedures
    - a summary sheet of financial statistics, including Mission and Service Fund information
    - a summary of the latest Pastoral Charge statistics from *The Yearbook of The United Church of Canada*

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

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

  - It is helpful if **the visitation leader,** could speak personally to the Official Board/Council chairperson and the Ministry and Personnel Committee chairperson to clarify the purpose of the visit and to become aware of any concerns about the visit itself or matters in the life and work of the Pastoral Charge. Following the conversation send a Pre-Visit letter confirming the date and time of the visit with a bulletin insert announcing such to the congregation.

- **The members of the visiting team** should read the *Questions for Discussion* and use them as a guide during the meetings. The information they request is necessary to compile an adequate picture of the Pastoral Charge. It is helpful if the team establishes a conversational atmosphere in all the interviews. A straight question and answer format can result in a person or group feeling "interrogated". Please note that the questions marked with a asterisk (*) are mandatory.

- **The visiting team** should meet to plan the visit, ensuring that:
  - each team member has a role to play during the visit.
  - has received and reviewed all material sent by the pastoral charge.
  - all visiting team members have read and understand the *Questions for Discussion* and other materials they will use.
  - hymns are selected and prayers are prepared for the open session worship
  - the team has planned the sequence of the visit.
  - the team has the resources needed (including felt pen, newsprint, an accompanist, etc.)
  - one member of the team is prepared to see the final report is compiled and submitted.

QUESTIONS FOR DISCUSSION

The following questions are guides to lead discussions about the life and work of the Pastoral Charge. It is hoped that the discussion will cover as many of these topics as possible. There is not an expectation that you will ask every question.

Section 1: QUESTIONS FOR A FIRST YEAR VISIT

Questions for the Ministry Personnel

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

Questions for the members and adherents of the Pastoral Charge

1. How are you helping to fulfill the expectations of the Joint Needs Assessment Report?
2. Who are the significant people in the history of this congregation?
3. What challenges are there in the Pastoral Charge/congregation?
4. How has the transition from the former clergy gone?
5. Have you encountered conflict…has it been resolved?
6. In what ways have you been able to apply personal gifts?

7. In what ways have you helped the ministry personnel and their family/partner transition into the life of the community?

8. What hopes do you have for this ministry as it goes forward?

9. Are there Presbytery or Conference resources or connections with which we could help the Pastoral Charge?

10. How often do you find yourselves saying, “When the last minister was here we…”?

11. Is there anything else you would like to say to the visiting team?

Section 2: QUESTIONS FOR TRIENNIAL VISITS

This section contains sample questions for :

Ministry Personnel	page 11
A Ministry Team	page 13
Other staff	page 13
Ministry and Personnel Committee	page 14
General Meeting with Congregation	page 17

QUESTIONS FOR MINISTRY PERSONNEL

Ministry with the Pastoral Charge

1. What excites you here? What aspects of your work do you look forward to?
2. What are your visions for this congregation and are they achievable?
3. What are your challenges or disappointments? Has there been personal growth?
4. How do you see your role and relationship to the congregation? What does the congregation expect from you?
5. How are your expectations being fulfilled? How are they not being fulfilled?
6. What is your sense of this congregation? Are you supported in:
   - your style of worship, pastoral care, Christian education, outreach
   - your lifestyle, educational needs, wider church involvement, recreation, any special needs etc.

Position Description/Terms of Call

7. When were the terms of your call or appointment reviewed? Were you consulted during the review? Are you satisfied with the terms?

8. Is the manse or housing allowance provided for you adequate?
9. Are manse improvements done in a timely and adequate manner? Do you feel satisfied with this? Is your study/office satisfactory?
10. Do you have a Position Description? Are you satisfied with the way you use your time? How do you keep a record of the way you use your time?
11. Describe your choice and frequency of continuing education. Do you consult with M and P prior to arranging it?
12. Do you take regular time off? How often? When and how do you have FUN?
13. How do you compensate when you are unable to take your regular time off?
14. If the office is in the church do you have your possessions there insured?

Support in Your Ministry

15. Where do you look for vocational support (theological, pastoral, institutional etc.)?
16. How do you make space in your life for the things that renew you? Where do you look for personal support?
17. How often do the Ministry and Personnel Committee meet and how would you describe your relationship to it?

Relationships within the Church

18. How would you describe your relationship with other staff? Do you meet regularly? Do you have adequate secretarial assistance?
19. Describe your relationship with other ministry personnel in the area (United Church and other denominations). With Presbytery?
20. How is your accountability to the congregation demonstrated?
21. How do you see your relationship with the Board or equivalent?
22. What support or action from Presbytery would be helpful to you?

Other Questions/Comments

23. Is there anything else you would like to say to the visiting team?

QUESTIONS FOR A TEAM MINISTRY

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

QUESTIONS FOR OTHER STAFF (SELECT APPROPRIATE QUESTIONS)

1. How clear are you about your duties as a staff member?
2. How clear are you about the role of other staff members and how their tasks relate to yours?
3. To whom do you feel accountable? How do they help or hinder your job?
4. Is there a clear distinction between your role as a staff member and your role as a member of the congregation?

5. In what ways do you relate to the Ministry and Personnel Committee? How does this committee deal with non-clergy staff?
6. When were the terms of your employment reviewed? Were you consulted during the review?
7. Comment on your level of satisfaction with your pay and benefits?
8. Do you work 14 hours or more per week? If so, are you enrolled in the United Church Pension Plan and Group Insurance Plan? (This is required.)
9. How are you included in planning, in worship, in programming, in pastoral support, in scheduling etc. of this church? How do you feel about this?
10. Can you identify some changes that could facilitate the running of this church?
11. Are there parts of the work that you find difficult or unpleasant? What would help?
12. Is there anything else you would like to say to the visiting team?

QUESTIONS FOR THE MINISTRY AND PERSONNEL COMMITTEE

If the Pastoral Charge does not have a functioning Ministry & Personnel Committee please ask these questions in the congregational meeting after asking the ministry personnel and other staff members to leave the meeting.

Role of the M&P Committee

1. Does each committee member have a copy of *A Handbook for Ministry and Personnel Committees*? Does the committee use the schedule of meetings found in Appendix B of the handbook? Have the members of the M&P Committee attended a workshop?
2. Describe the role of the Ministry and Personnel Committee on this Pastoral Charge Do you know what is expected of the Ministry and Personnel Committee?
3. How does the Ministry and Personnel Committee relate to the Official Board? Are the recommendations of the Ministry and Personnel Committee given appropriate consideration by the Official Board and its committees?
4. Do you feel equipped and supported for the duties you are asked to do? Are there additional kinds of support that would be helpful?
5. How does the M and P Committee demonstrate accountability?

Conflict Resolution

6. Is there a plan in place to address dissatisfaction or conflict within the congregation?

   Please describe the plan.

Supervision of Staff – Position Descriptions

7. * Do all members of the staff have a position description that includes the expectations of their role within the Pastoral Charge's ministry? What workweek do you expect of your clergy?
8. How often are position descriptions reviewed? Is the staff member consulted during the review?
9. How are the priorities for the staff's duties established? How do you feel about the priorities that have been set or adopted?

Supervision of Staff – Compensation

10. How often are terms of employment and terms of call or appointment reviewed? Is the staff consulted during the review? How do you determine the level of compensation received by your staff?
11. * Do you know the salary category of your ministry personnel? When was the salary category last checked?
12. *Are all lay employees who are working 14 hours or more per week enrolled in the Pension and Group Insurance Plan as required by the policies of The United Church of Canada?

Supervision of Staff – Review of Work

13. Do you have annual review of each staff member?
14. In what aspects of his or her work does each staff member demonstrate particular interest, skill or natural ability?
15. Can you identify areas of work where the staff does not show interest, skill or natural ability? How are those areas attended to?

16. How do you see the staff working to include and encourage the members of the congregation in the ministry of the Pastoral Charge? Are there obstacles?

17. How would you describe the relationship that presently exists between the ministry personnel and the members and adherents of the Pastoral Charge?

18. How would you describe, the working relationship between the ministry personnel and the various administrative and program committees of the Pastoral Charge?

Supervision of Staff – Time Off/Continuing Education

19. How many days off per week does each staff member have? Do staff members ever struggle with getting time off or taking time off? If so, how is that acknowledged and addressed?

20. Is there a good balance in the time the ministry personnel spend at work in the church and at home in their personal life?

21. To what extent are the ministry personnel involved in the work of the wider church, and how do the people of the congregation feel about it? To what extent are the ministry personnel involved in ministry to the community at large, and how do the people of the congregation feel about it? Do you have an inclusive marriage policy?

22. Do the ministry personnel demonstrate good time management skills? Please comment.

23.* What have the ministry personnel done in the way of continuing education in the past year? Do the ministry personnel use three weeks each year for continuing education? Does the Ministry and Personnel Committee have input into the content and scheduling of continuing education for the ministry personnel?

24. Does the pastoral charge offer financial support for continuing education of all members of the staff?

Support of Staff

25. In what way does the M&P Committee provide social, emotional and/or spiritual support to staff?

26. How does this pastoral charge encourage self-care on the part of ministry personnel?

27. Do the ministry personnel participate in a support group of any description?

United Church Policy

28. * Is the Police Record Check of each of the ministry personnel in compliance with the current policy of The United Church of Canada? What kind of screening procedures are in place for other staff members?

29. * Has each of the ministry personnel attended the mandatory racial justice training offered by Saskatchewan Conference?

30. * Has each ministry personnel attended the mandatory Sexual Abuse Prevention and Response workshop?

Other Questions/Comments

31. Is there anything else you would like to say to the visiting team?

*** All questions marked with an asterisk are mandatory.**

QUESTIONS FOR THE GENERAL MEETING

with the Official Board(s)/Council(s), and members and adherents of the Pastoral Charge

These are sample questions only and it is not necessary to ask every question in this list.

Ministry of the Pastoral Charge/Congregation

1. What are the signs of good health in your congregation? What do you celebrate?

2. What are the signs of ill health in your congregation? What are you doing to meet these challenges?

3. Tell us about your worship life: Sunday and other days: sacraments, special services, children's involvement, number attending etc.

4. Tell us about the Faith Formation programs being offered for children, youth and adults: Sunday School, Bible study, Confirmation classes, Vacation Bible School, mid-week programs, etc. What resources are you currently using? How are leaders trained? What are your hopes and dreams?
5. Tell us about the work of Pastoral Care in your pastoral charge. Who provides it and how?
6. What adult groups do you have on your pastoral charge (UCW, AOTS, other)?
7. What projects are you undertaking?
8. How are program leaders, teachers, and musicians offered support and encouragement?
9. How are the people of this pastoral charge involved in its ministry?
10. Describe how your pastoral charge relates with the wider community (partnerships, justice issues, charity work, and social justice committee).
11. If this is a multi-point Pastoral Charge, describe the relationship between the congregations.

The Official Board/ Council

12. Do you feel equipped and supported for the duties you are asked to do? Are there additional kinds of support that would be helpful?
13. Describe the organizational structure of the Pastoral Charge? Does it serve the needs and support the ministry of the Pastoral Charge? What are the challenges? How often does the Official Board meet?
14. Does the Pastoral Charge have a mission statement? Is this mission statement still relevant? Does the Official Board establish priorities and set goals for the ministry of the Pastoral Charge? How, and how often, is that done?

15. How are people invited to participate on Pastoral Charge committees? Is there wide participation? What is the policy regarding length of service on committees? Are you aware of the Conflict of Interest Guidelines of the Saskatchewan Conference?
16. How are committee members made aware of their responsibilities?
17. * How does the Ministry and Personnel Committee function?
18. Would you like to know more about the role of the Ministry and Personnel Committee? How does the Official Board/Council seek to equip and support the people of the Pastoral Charge in their ministries: within the Pastoral Charge? Within the wider church? Within the community at large? In their personal sense of discipleship?

Policies/Records

19. What is the policy of the Pastoral Charge for screening people who, on behalf of the Pastoral Charge, have contact with children, youth, the elderly and others who may be considered vulnerable. Has the Pastoral Charge made use of The United Church of Canada resources *Faithful Footsteps* and *A Tender Trust*?
20. Does the Pastoral Charge have policies regarding requests for marriages, baptisms, funerals? What other policies has the Official Board approved? How often are policies reviewed?
21. Who keeps the records (Membership, baptism, marriage, burial)? Where?
22. * Does the Pastoral Charge have at least one appointed Privacy Officer?
23. * Does the Pastoral Charge have at least one Sexual Abuse Officer of the Court?

Stewardship/Finance

24. Describe the Pastoral Charge's stewardship program. How are people encouraged to offer financial and other support for the ministry of the Pastoral Charge? (Do you use pledge forms, envelopes and/or PAR?)

25. What other methods do you use to raise money? Do you have a program for Planned Gifts?
26. What do you know about the Mission and Service Fund? What resources do you use?
27. * How does your contribution to the Mission and Service Fund and other outreach programs reflect your mission statement?
28. Approximately what percentage of the annual budget is allocated to programming?
29. Is the salary paid to the staff in keeping with the financial potential of your Pastoral Charge?
30. What is the condition of building(s) and manse? What are your plans for maintaining/upgrading?   What percentage of the annual budget is allocated to buildings? Do you have an active manse committee? Do you review your housing allowance or fair rental value yearly?
31. Are your buildings and contents insured for replacement value? Do you carry adequate liability insurance (at least one million dollars)? Is the United Church of Canada listed as co-insured for liability?
32. Do you have an up to date copy of the Financial Handbook?
33. If your financial records are computerized, how do you handle backups?
34. How do you ensure that statistical report and charitable status forms are completed accurately and on time?

Relationship with the Larger Church/Community

35. * How are Pastoral Charge delegates to Presbytery and Conference chosen? Are they recognized as members of the Official Board?
36. How are reports about Presbytery and Conference made to the Official Board and the Pastoral Charge?

37. How do the ministry personnel and Pastoral Charge delegate fulfill their responsibilities to the wider church (attending meetings, participating in committee work, etc.)
38. How does the congregation understand and support this work?
39. Describe the relationship between the Pastoral Charge and the Presbytery? Describe the relationship between the Pastoral Charge and the Conference, and the Pastoral Charge and the General Council.
40. Is your Pastoral Charge aware of the resources (videos, pamphlets, magazines, reports, studies, statements) of the wider church, and does it access them?
41. Describe your relationship with the local Ministerial Association, and other denominations in your community.
42. Is there way in which Presbytery could be helpful to you?

Other Questions/Comments

43. Is there anything else you would like to tell the visiting team? What other questions do you have for the visiting team?

*** All questions marked with an asterisk are mandatory.**

HANDLING DIFFICULT OR SENSITIVE SITUATIONS

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

9. Stay calm. It's not your problem and you can be more helpful if you don't take on the congregation's problem as your own. It is wise to not become defensive. Your "non-anxious presence" will help the congregation to reduce their own anxiety as well.

10. Be curious. Show openness to hear every viewpoint, slowing down the process if necessary to let everyone be heard. Paraphrase to show the person that you have understood.

11. If a person voices an opinion in a hostile way, there may still be some helpful information hidden in the message. A cantankerous person will often say things that others are feeling but are too "nice" to say. To show interest in what the person is saying and to reframe it in a more acceptable way may disarm the emotional charge.

12. Regardless of #3 above, if people persist in aggressive, hostile, disrespectful or abusive behaviour, they should be confronted and offered a more acceptable way to express their viewpoint.

13. If things get too heated, a break for prayer can often change the climate quickly.

14. If criticism is voiced, particularly of the ministry personnel when they are out of the room, it may be useful to get a show of hands to indicate how many others agree with each statement. You may even seek more specific information by asking how many (1) Strongly agree, (2) Partly agree, (3) Have no opinion, (4) Partly disagree, (5) Strongly disagree. This is very helpful information to put the criticism in context and to avoid giving too much power to a vocal minority. It also helps those who may be so taken aback by the criticism that they are silent, wishing later they had spoken up.

15. Remember that in any visit, many persons may including ministry personnel may feel vulnerable. Work hard to be open, transparent and fair with them. Avoid surprises as much as possible. After the open session with the Official Board(s)/Council(s) and people of the Pastoral Charge, meet with the ministry personnel to let them know the gist of what you heard. This way they are not left wondering if "the shoe is going to drop" in the form of the written report.

16. If there are issues that are specific to one point in a multipoint charge you may want to have a separate meeting with the board/council and congregation.

17. If there is bad news for the ministry personnel in the report (or any other key individual) make sure that person receives a copy of the report before anyone else does. Provide or arrange for some pastoral support if you think it wise. (The Regional Resource Personnel or Conference Personnel Minister may be helpful here.)

18. Following the review of the report by the oversight committee, the Presbytery Pastoral Oversight committee may wish to arrange a follow-up visit.

WRITING THE REPORT

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

Normally the report will be written and sent to ministry personnel and pastoral charge in 2 weeks. Response from pastoral charge and ministry personnel will be requested in 30 days. (We recognize this may require a special board meeting.) Report will normally be sent directly by visitors to charge and minister, but in particularly difficult situations it may be reviewed by Pastoral Oversight committee before distribution.

Complete the written report as soon as possible, and send within 2 weeks after the Oversight Visit as stated in the paragraph above. This is so vital information and the mood of the visit is not forgotten. It is appreciated when there is some consistency between the reports submitted to the Presbytery from different Pastoral Charges, so it is suggested that a reporting form such as the one included in the Appendix A-5 be used.

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

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

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

The member of the visiting team designated to write the Visitation Report sends a draft copy of the report, clearly marked "Draft", to the members of the visitation team for their input before distributing the draft report with Summary Sheet and Response Form to:

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

Ministry Personnel and board members are asked to read the report and indicate if there are comments that need clarification or more explanation, if there are significant errors or omissions please indicate such on the response form included with the report.

Ministry Personnel receiving the draft report return comments to the member of the visiting team designated to write the Visitation Report, who prepares the final Report of the Visitation, and sends the final report to the convenor of the Presbytery Oversight Committee (or equivalent). If there are significant changes to be made to the report other members from the visitation team need to be involved in the revisions.

If the Pastoral Oversight Committee is satisfied with the health of the Pastoral Charge the report is then filed with the Pastoral Oversight Committee.

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

A Pastoral Oversight Visit takes a lot of time and effort and your Pastoral Oversight Committee might consider a note of appreciation to the members of the team.

Appendix I
Suggestions for a Bulletin Announcement

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

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

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

When will the visit take place? **Date and time of the visit**

Who will make the visit? **Names of the visitors and Pastoral Charges from which they come**

Who participates in the visit?
All members of the Official Board/Council of the Pastoral Charge are asked to attend. All other members and adherents of the Pastoral Charge are encouraged to attend so that there will be a wide variety of people, both newcomers and long-timers.
The visiting team will have met with the M&P Committee, ministry personnel and church staff earlier in the day. The ministry personnel will come to the meeting with the people of the Pastoral Charge, but may be excused for part of the discussion.

What will be discussed at the meeting?
The discussion at the meeting will cover a wide range of topics including worship, sacraments, Christian development, leadership, church organization, resources, mission and outreach, stewardship and future planning. This is a time for celebrating the achievements, airing the frustrations, exploring the challenges you face as a pastoral charge.

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

What will the result of the visit be?
A report of what they heard and observed will be compiled by the visiting team. Copies of the report will be sent to the Official Board/Council of the Pastoral Charge, the ministry personnel and

the Presbytery Oversight Committee. Each group will have an opportunity to look at the report and offer their comments before the final report is written and sent out to the Pastoral Charge and Presbytery.
Any recommendations which require the attention of the Pastoral Charge will be indicated in the report, and after a reasonable period of time, the appropriate Presbytery committee will check with the Pastoral Charge to see what progress is being made, and if there is a need for further support or resources.
The report is useful to the Pastoral Charge as an objective review of our life together. It is like a mirror held up so the people of the Pastoral Charge can take a good look at their life and work, celebrating what is going well and making plans to improve areas where work is less effective.

Do you still have questions?
Please Contact the following people:
Names and contact information for those who are able to provide information about the Presbytery Oversight Visit.

APPENDIX II
SAMPLE PRE-VISIT LETTER

Greetings!
As a Presbytery of The United Church of Canada we are called to offer support, encouragement, resources and counsel to the Pastoral Charges within our bounds.
This ministry of the Presbytery is considered to be so vital to the health and well-being our Pastoral Charges that *The Manual of The United Church of Canada* requires all Presbyteries to visit each Pastoral Charge every three years.
This letter is to confirm arrangements for our visit to your Pastoral Charge.
Our team will consist of __________**names of members of the visiting team**________.
The following meetings have been arranged:
Time Length of meeting Person or Group Meeting Place
We believe it is important to involve the whole Pastoral Charge in this opportunity, and so, in preparation for our visit, we ask for the following:

- The visit and its purpose, including time and place, be announced to the congregation(s) in the worship bulletin for at least two Sundays before the visit. A suggested announcement is attached.
- The Pre-Visitation information be sent to the visiting team at the address below by __**(date)**___________.
  - a copy of the latest Annual Report
  - the mission statement and constitution
  - copies of Pastoral Charge policies and procedures
  - a summary sheet of financial statistics, including Mission and Service Fund information
  - a summary of the latest Pastoral Charge statistics from *The Yearbook of The United Church of Canada*

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

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

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

Sincerely,

Name and Address of the Visiting Team Leader

Visitation Leader

Appendix III
Presbytery Oversight Visit Response Form

Pastoral Charge____

Date of Presbytery Oversight Visit_____________________________________

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

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

2. Are there any errors or omissions in the written report? If "yes", please share them in the space provided below.

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

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

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

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

7. How might Presbytery be helpful to your congregation?

8. Please add other comments.

Signed_____________________________Position______________________________
(e.g. Minister, Chair Of Board Of Pastoral Charge)

Date: ____________

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

Appendix IV
Presbytery Oversight Summary Sheet

(This sheet is to be included with the draft visitation report as well as the final report.)

Name of Pastoral Charge receiving visit______________________________

Name of Points on the Charge	Number of People from each Point
1.______________________	____________________________
2.______________________	____________________________
3.______________________	____________________________
4.______________________	____________________________

Names of people on the visitation team:	Pastoral Charge represented
1.______________________________	____________________________
2.______________________________	____________________________
3.______________________________	____________________________
4.______________________________	____________________________
5.______________________________	____________________________

Date of visit:_____________________ First year visit: yes no

Tri-annual visit: yes no Other reason for visit (describe reason why)

____

____

Name of person and groups with whom you met:_____________________________________

Appendix V
Report Guideline

(The following is a guideline to use in writing an oversight report.)

Pastoral Charge:____

Date of Presbytery Oversight Visit:__________________________________

Visiting Team Members:____

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

Life of The Pastoral Charge

Role and Support of Ministry Personnel

Role and Support of the Laity

Stewardship

Relation to the Larger Church

Other Comments

Recommendations

Signature of Writer____

1. 1st copy of the draft goes to the other visitation members for their input.
2. After the other visitation members have their input, the “draft” report goes to the Official Board/Council chair and the ministry personnel with Summary Sheet and Response Form.

3. After the Response Form is received from the pastoral charge, the report is finalized and with the Summary Sheet goes to the Pastoral Charge and the Oversight Committee.

PASTORAL OVERSIGHT VISIT WORKSHOP

PURPOSE:

- **to acquaint presbyters and visiting team members with the purpose and procedure of an Oversight Visit**
- **to make the resources (guidelines and tools) available to the visitors.**
- **to set a tone of openness, support and celebration for visitors to take to the pastoral charge.**

OPENING:
Paul used letters to communicate with the congregations of the early church. Through his letters we know that congregations have always had life issues to deal with as they form a faith community. Such is human nature. Paul used the pattern of greeting the people of congregation with word like "grace to you and peace from God and from Jesus Christ" and he concluded with words like "May the grace of Jesus Christ be with your spirit, brothers and sisters"

Let us greet each other by passing the peace. "Peace be with you. And also with you"

We are a community of faithful people who have the responsibility of oversight and care for each other. One of the ways that we stay connected and support pastoral charges is by presbytery carrying out a prayerful and conscientious oversight visit. This is mandated in The Manual 332 to be carried out once every three years.

Refer to "Oversight Guidelines" page 3 to clarify
"What is a pastoral oversight visit?" and
"What a pastoral oversight visit is NOT?"

ACTIVITIES:

1. Take a few minutes in small cluster of 2-3 people to share experiences of an oversight visit to your pastoral charge. What were the constructive aspects? What were the unhelpful aspects? Then take a few minutes to share with the whole group.

2. A resource package has been prepared to guide Pastoral Oversight visiting teams through a visit to a pastoral charge. To help become familiar with the process and the material, we will divide the group into two to four groups and give each group a task to discuss and then share with the whole group. Remember to choose a recorder and reporter.
(If you have a small number of participants and have two groups, each group can take a second task when they have completed the first.)

   GROUP ONE: spend a few minutes brainstorming words that describe a visit, any visit. You might think about a visit with a friend or family member or you might think about a visit with a congregation. The general feelings and atmosphere can be very similar. What constitutes a good visit? What would you like to see in a visit? What feelings are experienced in a visit? Then review the Appendixes (pages 24-

29) to become familiar with the Bulletin Announcement, Pre-Visit Letter, Response Form, Summary Sheet and Report Guidelines

GROUP TWO: review the Oversight Guidelines to create a list of resources needed to carry out a Pastoral Oversight Visit (see Preparing for the Visit page 8) and define the role of the Visitation Leader. (Page 8)

GROUP THREE: review the Oversight Guidelines to identify a timeline for the visit. (e.g. Who contact whom and when; who writes the report and who does it go to) see Process for Pastoral Oversight Visit page 4 and Writing the Report page 22

GROUP FOUR: review the "questions for discussion" (pages 10-20) to identify two or three key questions for each person or committee being interviewed.

REPORT BACK TO THE LARGER GROUP:

QUESTIONS: Are there any questions?

CLOSING:

An oversight visit is an opportunity for celebration, for change, for affirmation. John F. Kennedy once wrote that "Leadership and learning are indispensable to each other." Let your oversight visits create an opportunity for leadership and learning.