

Name of Pastoral Charge:

Presbytery:

Section A:

Policies Required by Law

- 1) Privacy Policy; Name of Privacy Officer: \_\_\_\_\_
- 2) Workplace Violence and Harassment - includes compliance with Bills 168 and 132
- 3) Employment and contractor status is differentiated as properly
- 4) T4's and T4A's are issued as per Revenue Canada guidelines
- 5) Copyright: Does the congregation have the appropriate licenses for use of copyrighted material; including projection or print hymn lyrics, movies and performed music? What licences does it have and who is responsible for the reporting?
- 6) If the service, including hymns, is broadcast or podcast, is a broadcast license held?
- 7) Accessibility Policy
- 8) Charitable Status returns
- 9) Are wedding records complete and sufficient, including marriage license number?
- 10) Are fees for weddings, funerals, rentals and other services the same as members as for non-members as per Canada Revenue Agency



## Section B: Compliance with United Church Polity

- 1) Is the governing body meeting at least quarterly?
- 2) Governance Model – if not a model from The Manual, has Presbytery reviewed and authorized it?  
If so, when: \_\_\_\_\_;
- 3) Membership Roll – when last reviewed by local governing body, criteria used
- 4) Are there at least three trustees currently and is their appointment confirmed at the annual meeting?
- 5) Is the insurance policy reviewed annually?
- 6) Land Title – when was the title to the church property last reviewed to ensure it is current?
- 7) Cemetery – does the congregation have a cemetery? Is there a Cemetery Board and does the Board take responsibility for the Perpetual Care funds? Is it insured?
- 8) What is the Duty of Care 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. Where are records of volunteer screening kept?
- 9) Is the “Sexual Abuse Prevention and Response Policy and Procedures” available to the mission unit members and adherents?
- 10) 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?
- 11) If there are lay employees, is the Lay Employee Handbook available for them to review?
- 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 United Church of Canada
- 13) Is an annual budget approved?
- 14) Is the annual financial statement independently reviewed?
- 15) Has the local ministry met at least annually (e.g., congregational meeting)?
- 16) Is an annual report published? (please attach most recent copy)
- 17) Minutes: When were minutes last submitted to the presbytery for inspection?



LOCAL MINISTRY SELF ASSESSMENT

Category Title	As well as the general questions above, consider these more specific ones.
<p><b>Discipleship</b> (includes Christian education, evangelism, deepening faith)</p>	<ul style="list-style-type: none"> <li>• <i>What are some of your <b>discipleship activities or groups</b>?</i></li> <li>• <i>How do you <b>spread the gospel</b> in your community?</i></li> <li>• <i>How do you <b>teach</b> and learn the stories of our faith?</i></li> <li>• <i>How do you make space for and welcome <b>new people</b>?</i></li> </ul>
<p><b>Justice and Outreach</b></p>	<ul style="list-style-type: none"> <li>• <i>How do you understand <b>justice and outreach</b> to be part of your ministry?</i></li> <li>• <i>How do you identify <b>community needs</b>? To what extent do you collaborate with other groups who have common goals or interests?</i></li> <li>• <i>What are the <b>unique needs or strengths</b> or issues facing the community right now? How have you responded?</i></li> <li>• <i>How do you use General Council resources about specific justice issues?</i></li> </ul>
<p><b>Leadership</b></p>	<ul style="list-style-type: none"> <li>• <i>Who do you look to for <b>leadership</b> in your Local Ministry Unit?</i></li> <li>• <i>How much responsibility for <b>leadership</b> is placed on staff? On lay leaders?</i></li> <li>• <i>Are there <b>specific skills</b> or experience you need at this time?</i></li> <li>• <i>How do you support lay people to discern their gifts for <b>leadership</b>?</i></li> </ul>
<p><b>Ministry Partnerships</b></p>	<ul style="list-style-type: none"> <li>• <i>What ministry do you share with other churches, including local partnerships?</i></li> <li>• <i>What <b>shared ministry</b> conversations (informal, amalgamation, cluster) is your Local Ministry currently engaged in, or anticipating in the near future?</i></li> <li>• <i>What are your <b>ecumenical, outreach and/or interfaith partnerships</b>?</i></li> <li>• <i>What responsibility and initiative are expected of ministry personnel in your current or prospective partnerships?</i></li> </ul>
<p><b>Pastoral Care</b></p>	<ul style="list-style-type: none"> <li>• <i>What does pastoral care involve (e.g. pastoral visiting, funerals, UCW)</i></li> <li>• <i>To whom is <b>pastoral care</b> provided?</i></li> <li>• <i>Who provides <b>pastoral care</b> now?</i></li> <li>• <i>Are there specific local <b>pastoral care</b> needs that you have identified?</i></li> </ul>
<p><b>Stewardship</b></p>	<ul style="list-style-type: none"> <li>• <i>How frequently do you review your <b>financial situation</b>? How do you describe your financial position? Healthy? Abundant? Struggling? Crisis?</i></li> <li>• <i>Describe <b>the human gifts</b> that you have in your midst.</i></li> <li>• <i>What <b>property and other assets</b> does your ministry hold?</i></li> <li>• <i>In what condition are your physical assets? If reserves/trust funds are held are they growing or diminishing?</i></li> <li>• <i>How is <b>stewardship</b> kept visible? Who takes responsibility for it now?</i></li> <li>• <i>How do you support and benefit from the <b>Mission and Service Fund</b>?</i></li> </ul>
<p><b>Worship</b></p>	<ul style="list-style-type: none"> <li>• <i>Describe worship in your ministry. What makes it worth coming to?</i></li> <li>• <i>Describe the <b>music</b> in your worship services.</i></li> <li>• <i>What is meaningful for you in <b>sermons</b> in terms of content, relevance, academic/theoretical/historical components, length?</i></li> <li>• <i>What <b>other liturgical arts</b> are appreciated? (drama, puppets, altar)</i></li> </ul>



LOCAL MINISTRY SELF ASSESSMENT

Our Statistics from the last five years of submissions to the United Church of Canada show:

	Line # in the Yearbook	Current year	One year ago	Two years ago	Three years ago	Four years ago
Average weekly attendance Sunday	20					
Identifiable givers (local)	18					
\$ expended for pastoral charge operations	40					
# households under pastoral care	5					
# of members removed by death and cert.	14 and 15					
# of baptisms # of members received by prof of faith and cert.	8 12 and 13					

LOCAL MINISTRY SELF ASSESSMENT

## Section D: Reviewing Best Practices

### Planning for Ministry

Does the local ministry establish priorities and set goals for the ministry of the Pastoral Charge? How, and how often, is that done?

Is this congregation in partnership with any other organizations/pastoral charges?

Does the Pastoral Charge have policies regarding requests for marriages, baptisms, funerals; including for whom such services are provided, and a fee structure?

Have all requests for baptisms, communion services, weddings, or funerals of which the presider is not the settled or appointed ministry personnel been approved by the governing body?

Is the congregation interested in considering becoming an Affirming congregation?

### Stewardship

What percentage of the congregational budget and of what percentage of its identifiable givers is for the Mission and Service Fund? How is the fund promoted?

Are contributions to the Mission and Service Fund forwarded to the General Council Office monthly?

Is there an annual Stewardship Campaign? Does the congregation use the resources available from The Stewardship Toolkit.

### Ministry and Personnel Committee

How many members? \_\_\_\_\_

How often does the committee meet? \_\_\_\_\_

Does the Ministry and Personnel Committee meet with staff for annual reviews?

Are employment agreements and contracts reviewed annually?

When did Ministry and Personnel committee members last attend a training/support workshop?

### Finances

Who is responsible for counting and depositing the weekly offering? Who has signing authority for finances? (In both cases, at least two unrelated people should be doing this together).