

OVERSIGHT VISITS

About This Resource: *This resource contains policies and procedures that are mandatory and must be followed. These policies and procedures expand on the policy in Section J.1.2 of The Manual.*

Policies and Procedures

- 1. Background:** The presbytery Pastoral Oversight Committee visits each pastoral charge and other presbytery-accountable ministry at least once every three years. It carries out this responsibility on an ongoing basis by visiting one-third of all presbytery-accountable ministries each year.
- 2. Process:** The process for a visit is set out below. The presbytery Pastoral Oversight Committee is responsible for ensuring it is followed. Other steps in addition to those set out below may be included.
- 3. Who conducts the visit:** The presbytery Pastoral Oversight Committee arranges for a team of United Church members to conduct the visit. The team includes lay people and members of the order of ministry.
- 4. Guidelines:** The presbytery Pastoral Oversight Committee may develop guidelines that describe best practices for pastoral oversight visits. The visiting team follows these guidelines, adapting them to the particular situation.
- 5. Preparation:** The visiting team and the officers of the presbytery-accountable ministry prepare for the visit before it takes place. They review all material provided by the presbytery Pastoral Oversight Committee for use in the visit. This material includes (a) the most recent annual report of the presbytery-accountable ministry; and (b) any guidelines that have been set for the visit by the Pastoral Oversight Committee.
- 6. Ministry representatives:** The visiting team meets with the ministry personnel and a representative group of officers and other members of the presbytery-accountable ministry.
- 7. Police records check:** The visiting team also finds out whether the requirements under the Police Records Check Policy have been met for the ministry personnel serving the presbytery-accountable ministry. The results are noted in the visiting team's report.
- 8. Report:** The visiting team prepares a written report on the visit afterwards. It gives the report to the presbytery-accountable ministry and the presbytery Pastoral Oversight Committee.
- 9. Follow-up action:** The presbytery Pastoral Oversight Committee reviews the report and takes whatever further action may be necessary, including reporting the results to the presbytery.
- 10. Report to Conference:** The presbytery submits the report to the Conference as part of its report on the pastoral charges and other presbytery-accountable ministries within its bounds. The report is submitted to the executive secretary or speaker by April 15 of each year.

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Preparing for the Visit: The Visiting Team

Options

Presbyteries across the country have developed a variety of practices around visiting

- teams of presbyters or members of the Presbytery Pastoral Oversight Committee visit all congregations triennially, on a rotating schedule
- annual visits happen on one scheduled Sunday, with each local congregation visiting a neighbour
- on a triennial schedule, congregations are invited to a central location, with record inspections and workshops
- neighbouring congregations visit on a triennial schedule
- congregations with ministry personnel in their first year are visited; along with triennial visits

Best Practices

It is helpful to have at least one team member who has experience in a similarly sized Pastoral Charge to the one being visited.

Be clear with ministry personnel and in group meetings that the visiting team is taking notes during discussions in order to write a report that will be shared with the local ministry governing body, ministry personnel and the appropriate presbytery/Conference committees and staff. This includes noting who said what. Anonymous feedback is not appropriate.

Reporting can include: visiting team summary and notes, annual report and financial statements, copy of charitable tax return summary, local ministry self report

Be aware of triangulation: both noticeable and possible. What conversations need to happen? Who needs to be in conversation with each other? (this could be staff, lay people, different levels of the church) What steps can be taken to help conversations happen?

Preparing for the Visit – The Local Ministry Unit

- Please complete the Pastoral Oversight Local Ministry Self Assessment
- Have records ready for inspection
- Communicate the visit to the congregation(s) and invite people to participate

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During the Visit – Visiting Team

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

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

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After the Visit: The Visiting Team

Reviewing

Review the notes and summary from the visiting team (for meetings with ministry personnel and lay people), as well as the local ministry self assessment, annual report and financial statements. Highlight celebrations, patterns and (if any) concerns. If there are concerns: what resourcing does the congregation need to begin addressing them. (ie: support in crafting policy or mentoring on record keeping)

Reporting

Use the summary report outline to prepare the oversight report. It is shared with:

- the presbytery oversight committee (or equivalent)
- other committees/staff (as needed and appropriate)
- local governing body
- ministry personnel
- the Conference Executive Secretary (also include the local self assessment)

After the Visit

Resourcing

Follow up with any required work. This could include working towards policy/law compliance; connecting local ministries with regional or national staff, committees or programmes; mentoring; or follow up conversations.