

## 2008 Church Annual Review Form:

Part of the covenantal charge of the Church and Ministry Committee of the Association is to maintain contact with, and regular review of, our congregations. To that end we ask your timely response this review form. It is to be filled out by the moderator/ parish president or other lay leader – ideally after they have met with the Church Council or other church leaders to reflect together on the questions.

The hope is not only to get a sense of your congregation, but also to stimulate your thinking about topics that often get overlooked or put off until they are unavoidable. Your ideas may be helpful to other congregations as well. We would also appreciate your suggestions and critiques as to questions we may have forgotten or should have worded differently. A copy of the Review Form has been sent to the pastor so he/she is aware of the process. Feel free to expand your comments on the back of the form.

Please complete the form within two months and return it to:

Central Association Church and Ministry Committee, Section B SCNC, United Church of Christ 2401 North Lake Ave. Altadena, CA. 91001
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Thank you very much for your participation

### **VISION:**

#### Mission Statement:

1) Candidly, from your perspective as your Church's Lay Leader, what are the things that truly hold your congregation together? What are its core values?

2) How are these core values reflected in your Church's Mission Statement?

3) Do church members have, know and reflect your Church's Mission Statement?

#### Planning:

1) What planning are you doing for your Church's Future?

2) What kind of plans do you have for worship that will appeal to younger / different groups?

2a) Does your music have very broad appeal with young persons?

2b) Is your worship style welcoming to seekers?

2c) Does your worship style and outreach reflect the God is Still Speaking initiative?

3) How does your Church relate to its surrounding community?

## **YEAR TO YEAR CONCERNS:**

### **A. Clergy & Staff Care**

Two areas of Professional Church leadership have significant challenges in Southern California: Housing and Healthcare.

1) What planning are you doing around future Clergy housing?

1a) Do you have an 'equity sharing' plan? 1b) Do you have any other process to help qualified clergy from less competitive housing markets serve your church in the future?

2) Are you part of the UCC Health Plan?

2a) How do you provide for the health care of your full time and part time staff?

3). Is the Church leadership aware of the Conference Clergy **Compensation** Guidelines? (Go to <http://www.scnuccl.org/employment/index.html>)  Yes  No

3a) How do they affect your planning?

4). Is the Church leadership aware of the Guidelines on sexual **misconduct**? (Go to <http://www.scnuccl.org/employment/d/misconductguidelinespdf.pdf>)  Yes  No

Comments:

5) Do you have a Pastoral Relations Committee  Yes  No Does it meet regularly with the pastor(s)?  Yes  No  Monthly?  Quarterly?  Semi-annually?

5a) Are your reviews a fair and helpful evaluation of the full church program as well as the guidance and leadership of the pastor in those programs?  Yes  No

5b) Are you aware of materials to help with these evaluations such as those from the Alban Institute: <http://www.congregationalresources.org/ArticleEvaluationIE.asp>  Yes  No

6) The new UCC Ministerial Profile forms are now handled electronically and are on line at <http://www.ucc.org/ministers/profile/>. While completing and updating a profile is required of ministers seeking a new position, now ALL MINISTERS (whether or not they are anticipating a change in position) are expected to update their profiles to the new on line version which may include requesting written references from current church members. Is your congregation aware of this expectation?  Yes  No

7) Clergy are often given a sabbatical of several months every few years to expand and sharpen their ministerial skills. Has your congregation offered a sabbatical to your pastor? Have you made sufficient plans to cover the cost of temporary pastoral leadership while she/he is on paid sabbatical leave and also cover some of his/her expenses while traveling or studying?

**B. Transitional Planning**

1) Do you have plans in place should the need arise for an **interim** / transitional pastor should your pastor become temporarily disabled, retire or leave?  Yes  No Do your by-laws have articles that cover such a situation?  Yes  No Are congregational leaders aware of these plans/articles?  Yes  No Do you have any unique process you would like to share?

2). Are church **policies and procedures** codified and organized in a manual and is it updated so that if you lost a core leader (moderator, treasurer, clerk, head usher, janitor, church secretary, organist, choir director or pastor) the replacement would have a good idea what was expected of them and what recurring responsibilities have fallen on their shoulders? (Does anyone beside the treasurer know how to pay the janitor's Social Security withholding tax, for example, or is it written out some place?)  Yes  No  Working on it: expected completion date: \_\_\_\_\_

3) Where does your church keep its **records** and back-up files? (Is everything on the Pastor's computer?) Do you have off site storage to help reconstruct records in case of fire or other disaster?  Yes  No

4) Have you updated your Church By-Laws in the last 6 years?  Yes  No

**C. Stewardship, Insurance Liability & Stewardship of Real Estate Assets**

1) How does your church understand the concept of 'stewardship?' Does it include time as well as treasure? Does it include environmental stewardship? What else?

1a) What are the most effective fund raising **events** / techniques your church has used?

1b) Is **pledging** part of your church's cultural tradition?  Yes  No If so, what Percentage of your church's budget comes from pledges? \_\_\_\_\_ What Percentage from other sources? \_\_\_\_\_

1c) What time of year do you conduct your pledge drive? \_\_\_\_\_ Are the church financial officers bonded?  Yes  No What kind of insurance do you have on your financial officers?

2) **Liability:** What is your church policy relative to clergy, youth leaders, church school teachers, camp counselors, nursery workers and others who have close contact with children and youth?

2a). Do you require background checks for staff?  Yes  No For volunteers?  Yes  No  
Are you familiar with the various levels of background checks?  Yes  No What process do you use?

3) Are your buildings insured for full replacement value?  Yes  No How recently has your policy been updated? \_\_\_\_\_ Who is your Carrier? \_\_\_\_\_

4) Church Building **Partnerships**: Are you 'hosting' or 'nesting' outside groups such as Day Care Centers, Schools, Other Churches, AA, NA, AlAnon, etc.?  Yes  No 3a). How do they compensate you? 3b). Are they a source of new church members for your congregation?  Yes (explain how)  No

4c). How well does the mission of the 'nested' or 'hosted' group fit with the mission of your congregation?

4d) What kind of insurance / Liability Insurance arrangement do you have with them?

4e) What kinds of contract/covenant arrangements do you have with these groups? Does it comply with IRS guidelines?  Yes  No

4f) Do all groups using your facility maintain 501(c)3 status?  Yes  No  
If not, are you clear on how that affects your congregation's tax status?

**Planned Giving:** 5) Do you have a planning procedure to encourage members to consider Memorial and Endowment gifts and planned giving to the Local Church, Conference, Denomination, Pilgrim Pines or other church institutions?  Yes  No If yes, would you share any successful approaches you have tried?

## **D. Covenantal Participation**

1) Has your membership list been given to the conference office to give them subscriptions to the **United Church News**?  Yes  No 1A) Do you update the list regularly by submitting new members and address changes?  Yes  No

2) Do you have regular elected or selected **delegates** to the Conference and to the Association?  Yes  No

2a) Within the last year, have they attend :

- ✓ Conference Gatherings?  All  Some  None
- ✓ Association Meetings?  All  Some  None
- ✓ Ecclesiastical Councils for examining new clergy and congregations?  
 All  Some  None

2b) Does the Conference Office have contact information for your delegates?  Yes  No

2c) Does the local church cover all or part of their expenses?  Yes  No

2d) Do they give reports to the congregation on Conference/Association activities?  Yes  No

Written reports in your newsletter?  Yes  No Oral reports in Church?  Yes  No

Please share any unique/interesting ways they have given their reports.

3) **OCWM/ Dues:** Do you complete the Covenant Form or alert the Conference of your budget figure for Our Churches Wider Ministries (OCWM) at the beginning of your budget year?  Yes  No Could you?

Conference Business manager: Keith Clark (626) 798-8082, Ext. 12, [clark@scnucucc.org](mailto:clark@scnucucc.org)

3a) Do you maintain regular payments on your Per Capita Dues and OCWM?

Monthly \_\_\_\_ Quarterly \_\_\_\_ Annually \_\_\_\_

3b) Do you know your OCWM as a % of your total Budget? \_\_\_\_ As a % of your Member's giving (Pledge and Plate) ? \_\_\_\_%

3c) Does your church think of wider ministry as a percentage commitment of your income?

3d) Is your church a "5 for 5" Congregation?  Yes  No For more information go to:

<http://www.ucc.org/stewardship/is-your-church-five-for-five/>

4) Do you alert the conference off office of significant changes or activities at your church?

4a) Do you mail (or Email) your church newsletter to the Conference Office?  Yes  No

4b) Do you send a copy of your Church's 'Annual Report' each year to be included in your church file at the Conference Office?  Yes  No

4c) If you have updated your church By-Laws recently, did you forward a copy of your new By-Laws to the Conference office?  Yes  No

**E. Web Presence** Do you have a web site?  No  Yes URL: \_\_\_\_\_

Do you have suggestions for other churches seeking to upgrade their web presence?

**Who filled out this form?**

Name (Please Print) \_\_\_\_\_

Position within the Church \_\_\_\_\_

Contact number and/or email \_(\_\_\_\_\_) \_\_\_\_\_

Date the form was received \_\_\_\_\_ Date returned \_\_\_\_\_

Suggestions for improving this form: