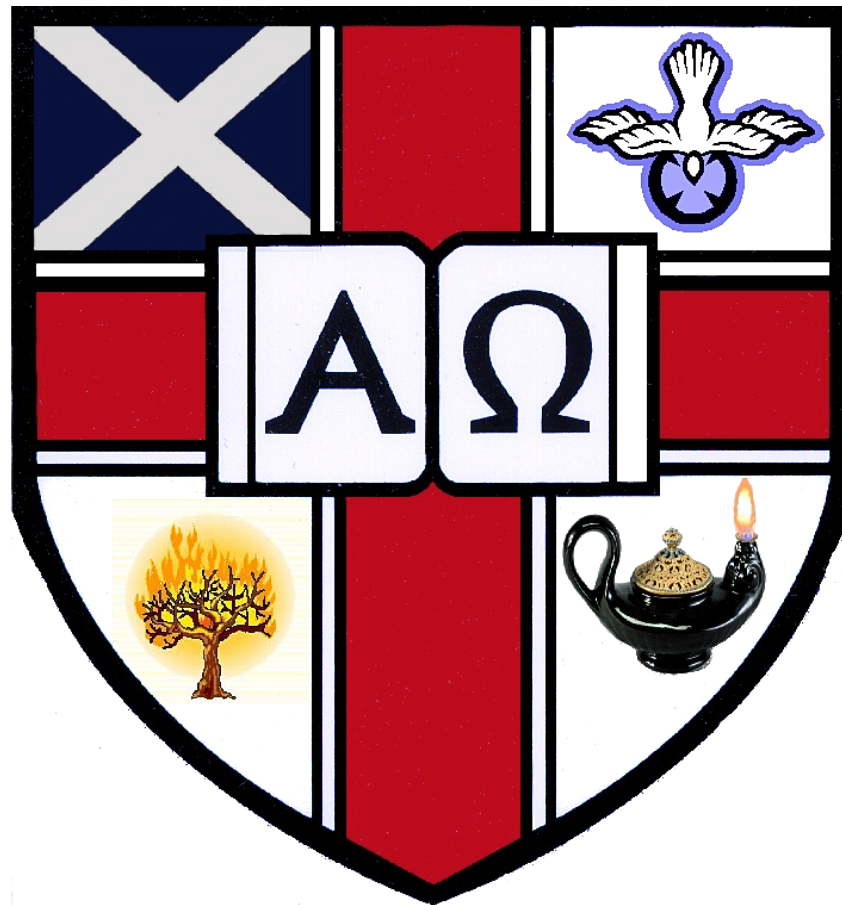


Record of an Episcopal Visit

Lux Lucet in Tenebris – John 1:5



Diocese of the Central States

Visit conducted _____ / _____ / _____ By _____

Introduction

Beginning with only a handful of parishes and missions the Diocese of the Central States seeks to fulfill the great Commission.

As our diocese grows we will need additional structure to maintain good record keeping, and to facilitate continued growth and continuity of mission.

Over time, a parish may receive oversight from a number of bishops. The availability of the records of previous episcopal visits is thus invaluable to the continuity of the work and ministry of the local church.

The bishop's visit is usually a cause for celebration, which is appropriate. However, due to time limitations, needed advice and counsel between the Bishop, Vestry and Rector has not taken place. Nor does time allow parish records to be properly reviewed and potential challenges to the success of the parish discussed.

The following material should assist both the leadership of the parish or mission and the diocese to better fulfill their respective duties.

The parish is responsible for preparing the requested information in advance of the Bishop's visit, and it should be given to him upon his arrival. Ordinarily the Bishop will meet with the Vestry, and chair the meeting, to discuss their Comments and/or concerns. He will also meet with the Rector or Vicar and review his ministry. Where warranted, the Bishop will follow up his visit with a letter which may be addressed to the Rector and Vestry, or if the situation warrants, to the congregation as a whole.

The visiting bishop shall retain a copy of the visit for his own records and shall forward the original reports to the Diocese for its official records.

In every case the Bishop Ordinary's role is that of chief pastor.

In certain cases where there are no confirmations, the Ordinary may designate a retired Bishop, the Archdeacon or a Canon to represent him. In such cases the same form shall be used.

We hope the following will be a useful tool of ministry in the local parish and at the level of the diocese.

- ___ 1. Membership List
- ___ 2. Current Financial Statement (Income statement & balance sheet) Dated _____
- ___ 3. Year End Financial Statement (Income statement & balance sheet) Dated _____
- ___ 4. Current By-Laws of Parish. Date of last revision is _____
- ___ 5. Articles of Incorporation/Articles of Association Date of last Revision _____
- ___ 6. List of Parish Officers and telephone numbers (Day and Evening)
- ___ 7. Minutes of last Annual Parish Meeting held on _____
- ___ 8. Minutes of any special Parish Meetings
- ___ 9. Copy of Employment Agreement, Call, or Contract between Rector/Vicar and Parish
- ___ 10. List of persons to be Confirmed or Baptized (send 14 days or more in advance of visit)
- ___ 11. List of Bank and Investment Accounts and Balances within thirty days of visit.
- ___ 12. 1 Parish Evaluation form from each member of the Vestry
- ___ 13. 1 Rectors Parish Evaluation Form
- ___ 14. 1 assistant Clergy Evaluation form for each assisting clergyman
- ___ 15. Parish Statistical Report
- ___ 16. Parish Register
- ___ 17. Other requested information

Comments:

Signed _____

Parish Preparation for Episcopal Visit

In every parish or mission, before the Bishop's arrival:

1. The wardens & members of the vestry should each complete the Parish Evaluation Form (PEF)
2. The rector should complete the Rector's Report Form (RRF) and complete and attach a copy of the Clergy Review Form (CRE) for every assisting member of the clergy serving in the parish.
3. The following items should be provided for the bishop:
 - a) A current list of Communicants and Baptized members with addresses, telephone numbers, and email addresses.
 - b) A current near financial statement (less than forty-five days old) which shall include a balance sheet and an income statement . This should be signed by a Certified Public Accountant or, if internally prepared, by the Sr. Warden and Treasurer.
 - c) A year end financial statement of the previous calendar or financial year. Signed by a Certified Public Accountant, or by the Treasurer and Sr. Warden.
 - d) A current copy of the Parish By-Laws, clearly noting any changes made since the last Episcopal visit. Signed by the Sr. Warden and Secretary as true and authentic
 - e) A current copy of the Articles of Incorporation or Articles of Association, if applicable.
 - f) A list of Parish officers with addresses, telephone numbers, and email addresses. Signed by the Sr. Warden and Secretary as true and authentic
 - g) The minutes of the most recent Annual Parish Meeting and any Special Meetings which have occurred since the last episcopal visit. Signed by the Sr. Warden and Secretary as true and authentic
 - h) A copy of the contract or other agreement between the Parish/Mission and its Rector/Vicar.
 - i) A list of confirmands or baptismal candidates for the Bishop's visit should be provided at least fourteen days prior to the scheduled visit.
 - j) A list of all bank or investment accounts maintained by the parish and the current balances.
 - k) The Parish Register should be available for inspection

Parish Evaluation Form

To be completed individually by the Wardens and every member of the Vestry prior to the Episcopal Visit

Parish: _____
Name of Vestryman _____ **Date Prepared** _____
Office Held _____ **On the vestry since** _____

Rector or Vicar

In your opinion, rate the Rector's performance in each of the following areas with a "1" being very weak and a "5" being very strong. If you do not feel qualified to rate his performance in any area circle N/Q.

1. **Pastoral care.** Visits the sick, remembers birthdays, available for counsel when needed. Demonstrates that he cares for his people. 1 2 3 4 5 N/Q

Comments:

2. **Evangelism.** Calls on visitors and newcomers, works to make church grow. Teaches the Great Commission as focus of ministry. 1 2 3 4 5 N/Q

Comments:

3. **Preaching & Teaching.** Effective in communicating the whole Gospel. Does not shy away from difficult issues. Varies topics and takes time to explain doctrine. 1 2 3 4 5 N/Q

Comments:

4. **Church Discipline & Conflict Resolution.** Uses tact, exhibits maturity and wisdom in dealing with problem individuals. 1 2 3 4 5 N/Q

Comments:

5. **Leadership.** Sets example for the congregation in his devotion to Christ and the Church and in commitment of time, treasure and talents. Seeks lay involvement. 1 2 3 4 5 N/Q

Comments:

6. In your opinion, what is the Rector/Vicar's greatest strength(s):

7. What are the Rector/Vicar's greatest weakness(es) (area needed for improvement):

8. To what degree is the parish responsible for these weaknesses?

The Vestry

1. Is actively engaged in the life and work of the parish	Yes	No
2. Supports the ministry of the Rector	Yes	No

- | | | |
|--|-----|----|
| 3. You personally, as a member of the Vestry: | | |
| Attend Sunday School | Yes | No |
| Attend Bible Study | Yes | No |
| Tithe or are committed to tithing | Yes | No |
| Attend church three at least three times a month | Yes | No |
| I am personally involved in the following ministries: (List) | | |

The Congregation as a whole

Answer the following based on your personal observations and add comment, if necessary:

- | | | |
|--|---|---|
| 1. Parish too comfortable with status quo to grow. | T | F |
| 2. Welcomes visitors. | T | F |
| 3. Supports the Rector/Vicar in his ministry | T | F |
| 4. Faithful in attendance. | T | F |
| 5. Faithful in stewardship: time, treasure and talent | T | F |
| 6. Actively seeks new members | T | F |
| 7. Actively supports opportunities for Christian Education
(i.e. Sunday School and Bible Study) | T | F |
| 8. In my opinion, the greatest issue facing our parish is: | | |
| 9. In my opinion, the greatest accomplishment of the parish in the last twelve months was: | | |
| 10. Other questions | | |

Bishop's Use: Do not write below this line

Parish Statistical Report

Parish: _____ Date: _____

Current Active membership Data	
Date Records Last Examined: _____	
_____/_____/_____	
Communicants	_____
Baptized Members	_____
Total	_____
Active as of last examination	_____
Inactive	_____
Additions	
Baptism	_____
Confirmation	_____
Transfer	_____
Subtractions	
Deaths	_____
Excommunication	_____
Transfer	_____
Moved to inactive	_____
Certified:	

Rector	Date

Secretary or Parish Clerk	Date

Parish _____

Mailing Address _____

Office Phone # _____

Fax # _____

Is parish incorporated? _____

Sr. Warden
Address _____
Phone _____
Email _____

Jr. Warden
Address _____
Phone _____
Email _____

Secretary
Address _____
Phone _____
Email _____

Does parish rent or own its place of meeting? _____ If rents, terms of lease: _____

Is property owned outright or mortgaged?: _____ Balance \$ _____

If Mortgaged, who holds mortgage? _____

Phone number of Mortgage Co. _____

Value of Land: \$ _____ Value of Building \$ _____ Year Constructed _____

Do Not Write Below This Line

Rectors Evaluation of Parish

Parish: _____ Date: _____

Part I. Issues affecting the parish

Issue	Comment
1.	
2.	
3.	
4.	

Part II. Rector's Goals for the next year.

Part III. Rector's Vision for long term of Parish

Part IV. Evaluation of Parish Structures

1. Is the Vestry supportive of the goals in Part II and Part III above? Explain?
2. Rate the parish in the following areas.

Stewardship of Time

Stewardship of Talent

Stewardship of Treasure

Support of Sunday School, Bible Study, etc.

3. If the parish is weak in any of the above, what steps are you taking to remedy?

4. Explain your understanding of pastoral care - especially as it relates to the sick and shut-ins, and to those in need of counseling.

5. What is the greatest challenge facing the parish?

6. In what areas do you think the vestry could be more supportive of your ministry?

7. What can you do to improve your ministry?

8. What confidential problems relating to individuals within the parish, if any, need to be shared with the bishop?

9. What is the parishes greatest accomplishment in the past year?

10. Other:

Bishop's Use—Do not write below this line

DIOCESE OF THE CENTRAL STATES

MONTHLY REPORT FORM FOR MISSION WORKS AND PARISHES

NAME OF PARISH _____

MONTH _____

Date	Attendance	No. of Visitors	Offering	Name of Visitors	Address of Visitors
TOTALS FOR MONTH					

Please fill out this form each month and return to the Diocesan Office.

Reformed Episcopal Church

Monthly Income and Assessments

Year _____

Congregation: _____ City/State: _____

<u>Date</u>	<u>Total Income</u>	<u>(-) Designated Gifts</u>	<u>(=) Net Income</u>	<u>Assessments</u>
Wed. _____	_____	_____	_____	_____
1 st Sun. _____	_____	_____	_____	_____
Wed. _____	_____	_____	_____	_____
2 nd Sun. _____	_____	_____	_____	_____
Wed. _____	_____	_____	_____	_____
3 rd Sun. _____	_____	_____	_____	_____
Wed. _____	_____	_____	_____	_____
4 th Sun. _____	_____	_____	_____	_____
Wed. _____	_____	_____	_____	_____
5 th Sun. _____	_____	_____	_____	_____
Wed. _____	_____	_____	_____	_____

Date of Assessment Check: _____

Amount of Assessment Check: _____

Check No. _____ Treasurer: _____

Explanation of designated gifts:

This form is completed monthly by the treasurer and retained to be given to the Bishop upon his visit. The spreadsheet "Congregation_Monthly_Tithe_Form.xls" may be used.