

## **EVALUATING CONGREGATIONAL HEALTH**

9/10/18

### **Congregational Health and Vitality Assessment**

*Please answer the following. Does your congregation:*

#### **Worship and Spiritual Health**

- 1) Hold regular worship?
  - a) When is it held? How many services are held per week?
- 2) What is the average weekly worship attendance?
- 3) Have a regular priest?
  - a) If not who leads the services? A changing rota of Sunday Missioners (supply priests)? Are the congregation lay led?
- 4) Offer other Offices (Morning/Evening Prayer etc.)?
- 5) Offer Sunday School, Bible Study or some other form of Christian Education
- 6) Offer music regularly?
- 7) What would you say are your congregation's spiritual gifts?

#### **Mission/Community Engagement**

- 1) Have a clear sense of mission beyond just keeping doors open?
  - a) If so, is it publicly stated in the bulletin, website, etc?
  - b) Does the vestry know it?
- 2) Engage the community in a way that leads the community to value the church and see it as a resource?
- 3) Have clear and up to date signage?
- 4) Have a clear and up to date website and/or Facebook page?
- 5) How many other Authentic Sacred Encounters occur in an average week? (pastoral visits, meals provided, students tutored, etc)
- 6) Partner with or host other organizations or meetings such as AA, an exercise class, etc?
- 7) Describe the demographics of your community in terms of setting, wealth, age and ethnicity. Please reference the Mission Insite Report at [www.episcopalchurch.org/posts/research/study-your-congregation-and-community](http://www.episcopalchurch.org/posts/research/study-your-congregation-and-community).
- 8) Have those demographics changed significantly in the last 10 years? If so, how?

#### **Financial/Administrative**

- 1) Use generally accepted accounting practices including but not limited to:
  - a) Keeping all financial records and checks in a secure location at the church
  - b) Having multiple people capable of managing the finances in the event that the current Accounting Warden and/or Treasurer were to be incapacitated
  - c) Creating and issue regular and up to date financial reports for the vestry
  - d) Requiring 2 signers for checks in excess of a certain amount
  - e) Keeping all personnel records in a secure location
- 2) Keep a budget?
  - a. If so is there a deficit?

- b. If there is a deficit, is there a plan to eliminate or decreased it?
  - c. Have steps been taken to put that plan into action?
  - d. Give access to monthly report to congregation?
- 3) Are taxes (both property and payroll) and utility bills current?
- 4) Are payroll, pension and health insurance payments current?
- 5) If there is a mortgage or other debt, are those payments current?
- 6) Have property and liability insurance?
  - a) Is it current?
  - b) Does it meet minimum diocesan standards?
  - c) Does that insurance name the parish, staff, vestry and diocese as additional insured?
- 7) Have an endowment?
  - a) If so where is it invested?
  - b) Are the rate of return and management fees reviewed?
  - c) Is it being drawn down over and above the regular disbursement rate?
    - If so, how long has this been going on?
    - Is there a plan to stop or slow the additional draws?
- 8) Lease space to any other organizations?
  - a) If so is there a written agreement?
  - b) Is that agreement current?
  - c) Has the renter provided a copy of liability insurance?

### **Governance**

- 1) How many people serve on the vestry?
- 2) How often does the vestry meet?
- 3) Regularly rotate its membership once terms are expired?
- 4) Keep minutes of vestry meetings?
- 5) Present the decision of the vestry to the congregation in a regular and clear manner?

### **Physical Plant**

- 1) Maintain church property so that it is safe, clean and inviting?
- 2) If there is deferred maintenance what is the extent?
  - a) Are any parts of the building rendered unusable?
  - b) Is there a plan to mitigate/repair it?
  - c) Are there funds to do the work?

### **Engagement with the Diocese**

- 1) Filed a parochial report? If so when was the last one?
- 2) Had an audit? If so when was the last one?
- 3) Current in paying Sacred Gifts for Administration (Assessments)?
- 4) Make a Gift for Mission (Pledge) to the Diocese?
- 5) Send clergy and a lay delegation to Diocesan Convention?
- 6) In contact with Dean?
- 7) Attend the Deanery and/or Clericus meeting?
- 8) Anyone who serves on a Diocesan Committee/Commission?
- 9) When did the Bishop last visit?



## **The Future**

- 1) What is your congregation's dream? What would you like to accomplish or become if there were no obstacles?
- 2) What obstacles are preventing you from achieving it?
- 3) Aside from money, how can the Offices of the Diocese help you get there?