

PARISH ASSESSMENT WORKBOOK

BY
ROBERT A. GALLAGHER, OA
LINDA MISKA TAVELLO, COA

PARISH RESOURCE SERIES



A RESOURCE FROM

ASCENSION PRESS

THE ORDER OF THE ASCENSION

The Order of the Ascension is an Anglican community of priests under a promise of stability, obedience and conversion of life and those who have chosen to share in the life and witness of that community as Companions and Associates.

We understand ourselves to have an apostolate to parishes with particular challenges for faithful life and ministry. These challenges may arise from within the congregation's own life and history or the sociological and demographic context of the community. We serve parishes that are in poor, working class and minority communities; those in urban, rural and isolated settings; and those that are small, have a history of instability or are longing for renewal as a Christian community.

The Order desires to live within and to advance Catholic faith and practice as received in the Anglican tradition. This includes living within the Anglican pattern of worship, doctrine and action; making full use of the Book of Common Prayer, rooting our spiritual discipline in the three-fold rule of prayer -- Holy Eucharist, Daily Office and personal devotions; and conforming to the doctrine, discipline and worship of the Episcopal Church. In our life as an Order and in our work in parishes, we want to further a strong and full living of the Christian life -- in liturgy and service, evangelization and justice, spiritual formation and parish fellowship.

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We maintain a common life appropriate to our mission through regular gatherings. Members participate in three week-long gatherings each year for retreat, chapter, continuing education and a common vacation.

Vows are taken with a life intention that is renewed every three years. We take a promise of stability, obedience and conversion of life which we see as necessary commitments in the fulfillment of our baptism and as we pursue the mission of the Order.

Ascension Press produces resources for parish development and oversight that are consistent with the mission and general orientation of the Order.

The Parish Development Institute is co-sponsored with the General Theological Seminary to provide substantial training for parish leaders in development and oversight. Two summer sessions, of two weeks each, are combined with a reading program and field work reports during the year. A brochure is available.

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The Rev. Robert A. Gallagher, OA comes with a background which includes urban parish ministry, industrial mission work and nineteen years as a trainer and consultant in the field of Parish Development. Father Gallagher is presently part of a pastoral team for the parishes of St. Michael's and St. Andrew's in the city of Trenton, NJ. He was formerly the Congregational Development Officer for the Diocese of Connecticut. His publications include *Stay in the City*, and *Power from on High: A Model for Parish Life and Development*.

Linda Miska Tavello, COA has served as a parish development consultant and trainer to congregations in the dioceses of Connecticut, New York, New Jersey, and Indianapolis. She also staffs evangelization workshops and the Parish Development Course for the Diocese of Connecticut.

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PARISH ASSESSMENT WORKBOOK

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I. INTRODUCTION TO THE PARISH ASSESSMENT WORKBOOK

This workbook is a resource for a parish's reflection on its life and ministry. It provides an orderly way to collect and present information. It is up to the appropriate committee and its subgroups to decide on the best use of the workbook. The committee's task is to create a parish profile.

The profile is developed to give a clear, accurate and comprehensive picture of the parish as it is now and a vision of the directions to which the parish understands God to be calling them.

The profile is a public document which is shared with the congregation and the Bishop. If it is being used as part of a search process a copy is given to each priest candidate.

The committee may want to consider issues such as the use of pictures (church property, buildings, the congregations at worship, etc.), what type of cover to provide and how to produce a quality document (well written and typed, etc). Other documents can be attached or photocopied and included with the profile itself, e.g., recent parish plan, evangelization or stewardship plans and materials, parish handbook, sample Sunday leaflets, sample newsletter, last annual report, etc.

The use of a trained parish development consultant to assist the congregation and committee explore some aspects of its life is recommended.

The workbook assumes that there is an open parish gathering at which the congregation engages in an assessment of the parish's life and ministry. Assessment forms may be filled out prior to the meeting. (See Appendix for possible forms to use or modify).

II. INTRODUCING THE ASSESSMENT PROCESS

The profile should include some introductory material such as:

1. A statement that makes it clear what the profile represents, e.g., "This is the parish's attempt to provide a clear, accurate and reasonably comprehensive picture of the parish as it is now, and a vision of the direction to which we understand God is calling us as a local expression of the Body of Christ."
2. Table of Contents.
3. The names of committee members and the name of your consultant.
4. A brief statement (1-2 pages) that presents the essential message you want to give.

III. PROFILE OF THE COMMUNITY

The committee's task is to describe the community and neighborhood(s) of the parish. The following should be considered.

1. History of the neighborhood community: significant events, periods, people, times of transition, etc.
2. Map: a map of the community that identifies the church buildings, the buildings of other active religious groups, specifically noting the location of the nearest Episcopal churches. Major geographical features and roads.
3. Geography: What political/administrative unit(s) is the parish in? Where are the buildings located? Does the area have a particular identity, e.g., is it known as being a certain type community? Describe. Identify any distinct neighborhoods. How do they relate to each other? What are the focal points of the community? Where is the parish church in relationship to them?
4. Population: What is the area's population? What is the age distribution? What are the education and income levels? What ethnic groups are represented? How stable is the population? If it is changing, why...how?
5. Housing: Describe the type of housing in the area (cost, privately owned, rented)? Describe any housing problems in the community. Any major changes likely in the next ten years?
6. Work: Describe where people in the area work. Which types of work are most common? Do husbands and wives both work? Do the lawyers, doctors, teachers who work in the community also reside in the community? Do the service workers, police officers and those practicing skilled trades who work in the community also reside in the community? Describe any unemployment problem. Are there one or two major employers in the area? Are any major shifts likely in the next ten years?
7. Institutions: Describe the major institutions in the area, e.g., schools, government offices, hospitals, universities, etc. What is their relationship to the area? Any major changes likely?
8. Community Facilities and Life: Describe the availability and effectiveness of community resources such as bus and train service, leisure and recreational facilities, shops, restaurants, dentist, doctors, library, post office, etc. What are the major social institutions? What are the local community associations, pressure groups, etc. How influential are they? Any major changes likely in the next ten years?
9. National Trends: What national trends (social, cultural, economic, etc) seem to be influencing the community in some significant manner?
10. What would you say are the major strengths and weaknesses of the community?
11. What significant difficulties or opportunities is the area likely to face in the next ten years?

IV. PARISH HISTORY AND BACKGROUND

1. History

- a. Founding, key leaders, events, periods, decisions, times of change, etc.
- b. Committee's reflection on the history: what strengths have been nurtured; what areas of "blindness" seem to show themselves in the history; what has the parish received and resisted of God's call; what is the committee's understanding of periods of growth and decline, etc.

2. Membership Statistics (need to come as close as possible)

15 yrs ago 10 yrs ago 5 yrs ago Present

a. Baptized Members

b. Adult Members

(Baptized members 16 and over)

c. Communicants

(All baptized members who have received Holy Communion at least three times during preceding year)

d. Adult Communicants

(16 and over from above category)

e. Voting Members

(According to canons or by-laws or adult members who for at least six months prior to the parish meeting have been faithful attendants at the services of the Church in the parish, unless for good cause prevented faithful contributors to its support and faithful in working, praying and giving for the spread of the Kingdom of God, as determined by the vestry)

3. "Picture" of Current Membership

Describe members considering factors such as age distribution, income level, education, type of work, etc. How does this compare to the general community: To what extent does the congregation reflect the makeup of the community? How is it different? Is there anything unique about the makeup of the congregation? How close do people live to the church buildings? What is the geographical spread of parishioners? How stable is the "picture" you are presenting? Is it changing? If so, how and why?

4. Description of Facilities

Provide descriptions and diagrams of buildings and grounds. The profile could possibly include photos of the inside and outside of various buildings.

V. WORSHIP

Holy Eucharist - Daily Office - Personal Devotions

A. STATISTICAL INFORMATION AND DESCRIPTION

1. Average Sunday Attendance (if possible, based on on Sundays; note that this is not simply a listing from the parochial report of four key Sundays)

Past Four Years	_____

Five Years Ago	_____
Ten Years Ago	_____
Fifteen Years Ago	_____

2. Average Christmas and Easter Attendance

	<u>Christmas</u>	<u>Easter</u>
Past Four Years	_____	_____
	_____	_____
	_____	_____
Five Years Ago	_____	_____
Ten Years Ago	_____	_____
Fifteen Years Ago	_____	_____

3. Describe the pattern of parish corporate worship e.g., Holy Eucharist (is it the principal act of worship every Sunday?), use of the Daily Office, midweek celebrations of the Holy Eucharist, celebration of major feasts and Holy Days (Christmas, Epiphany, Ash Wednesday, Maundy Thursday, Good Friday, the Easter Vigil, Ascension, All Saints', etc.). What other special services are held during the year? What rites are used? Describe how music is used in worship (e.g., use of choir, instruments, chanting, congregational response music, anthems, etc.).

WORSHIP, continued

4. What forms of instruction and study are provided to nurture people's prayer life and participation in liturgy?

5. Describe the guilds and individuals that play special roles in worship, e.g., altar guild, chalice bearers, lectors, greeters, ushers, acolytes, choir, organist, prayer groups, etc. Do they have "job descriptions?" How are they trained, coached and supervised?

6. Describe the participation of children in the Holy Eucharist on Sundays and other major feast days.

B. SUMMARY OF ASSESSMENT OF PARISH LIFE AND MINISTRY* WORSHIP

This is to summarize the responses of people at the open parish gathering along with the committee's thoughts about those responses.

1. Rating Totals: Worship

very dissatisfied /1 /2 /3 /4 /5 /6 / very satisfied

2. What did people say? Strengths, weaknesses, etc.

3. What is the committee's assessment? To what extent is there strength in this basic, essential area of parish life and ministry?

C. IDENTIFY AND EXPLAIN ANY RECURRING ISSUES OR PATTERNS IN THIS AREA OF PARISH LIFE.

D. DESCRIBE THE COMMITTEE'S UNDERSTANDING OF THE OBJECTIVES THE PARISH WILL NEED TO ADDRESS IN THE NEXT FIVE YEARS IN THE AREA OF WORSHIP.

*See samples of Assessment forms in the Appendix

VI. DOCTRINE

Scripture - Catholic and Apostolic Tradition - Reason

A. STATISTICAL INFORMATION AND DESCRIPTION

1. Adult Education and Formation

Is there a "Foundations" course in faith and practice offered? Which one? How often? How many people have participated in the past three years? What other adult offerings are there, e.g., Bible study, Lenten study, etc.?

2. Formation and Education of Children

Describe the present approach to the Christian formation of children and young people. Is there a church school? What role does it play in the overall task of formation? Describe enrollment statistics, curriculum, attendance trends, teach training and supervision, etc.

3. Library (if applicable) - describe the number and type of books; is there an adequate number of Bible and prayer books? How are new titles added? What is the funding process for the library? Is the library accessible to all (i.e., in an area where coffee hours take place or other convenient location)?

4. Lay Catechists - describe duties, training, number involved, etc.

B. SUMMARY OF ASSESSMENT OF PARISH LIFE AND MINISTRY: DOCTRINE

1. Rating Totals: Doctrine

very dissatisfied /1 /2 /3 /4 /5 /6 / very satisfied

2. What did people say? Strengths, weaknesses, etc.

3. In the committee's judgement, how well informed are parish members in Christian faith and practice as known and taught in the Episcopal Church? What percentage are very well informed, well informed, adequately informed, etc.?

C. IDENTIFY AND EXPLAIN ANY RECURRING ISSUES OR PATTERNS IN THIS AREA OF PARISH LIFE.

D. DESCRIBE THE COMMITTEE'S UNDERSTANDING OF THE OBJECTIVES THE PARISH WILL NEED TO ADDRESS IN THE NEXT FIVE YEARS IN THE AREA OF DOCTRINE.

VII. ACTION

Service - Evangelization - Stewardship

A. STATISTICAL INFORMATION AND DESCRIPTION

1. Describe the awareness of lay members of their ministries of service, stewardship and evangelization in their families, work and neighborhood. How is the parish helped to foster such awareness? Do a significant number of members understand these ministries as related to Holy Baptism and the Eucharist?

2. Service: describe service outside the parish membership, in the local community and beyond; include parish programs, financial gifts, etc. Indicate source of funds given away, e.g., all fundraising efforts, budgeted items, etc. Use of buildings by neighborhood groups such as community associations, scouts, etc. Are there any parish groups with a specified service ministry?

3. Stewardship: How well is stewardship understood as an issue of the spiritual life? Is there teaching about stewardship as sacrificial, proportionate, with tithing as a minimum goal? Is there a parish group with a stewardship ministry? List the number of pledging units and the average weekly pledge per unit for the past four years; include a history of five, ten and fifteen years ago. Define pledging unit. How is pledging handled? Is there an Every Member Visitation?

4. Evangelization: Describe present practice; changes in the recent year?

- a. How does the parish invite, greet, orient new members?
- b. How does the parish minister to the lapsed?
- c. Any involvement in helping start a new congregation in the diocese or in another country?
- d. Are there specific groups with an evangelization ministry?

B. SUMMARY OF ASSESSMENT OF PARISH LIFE AND MINISTRY: ACTION

1. Rating Totals: Action

very dissatisfied $\frac{\quad}{1} \frac{\quad}{2} \frac{\quad}{3} \frac{\quad}{4} \frac{\quad}{5} \frac{\quad}{6} \frac{\quad}{\quad}$ very satisfied

2. What did people say? Strengths, weaknesses, etc.

3. What is the committee's assessment? To what extent is there strength in this basic, essential area of parish life and ministry?

C. IDENTIFY AND EXPLAIN ANY RECURRING ISSUES OR PATTERNS IN THIS AREA OF PARISH LIFE.

D. DESCRIBE THE COMMITTEE'S UNDERSTANDING OF THE OBJECTIVES THE PARISH WILL NEED TO ADDRESS IN THE NEXT FIVE YEARS IN THE AREA OF ACTION.

VIII. OVERSIGHT

Spiritual Direction - Transforming Community - Institutional Management and Administration

A. GENERAL DESCRIPTION

1. One way of understanding parish oversight is as the task of facilitating the parish as a whole into a full and strong participation in the Christian Life (worship, doctrine, action). It is the work of bringing and preserving a proper order in the Body, the enabling of a "holy order." This task can be seen as including monitoring and initiating in three areas: spiritual direction, transforming community and institutional management and administration.

2. Describe the functioning of those individuals and groups with significant oversight responsibilities, i.e., rector, wardens, vestry, parish development team, worship committee, annual parish meeting, etc. How do they exercise oversight? How do they relate to each other? Are there job descriptions?

3. List clergy in charge for past 20-30 years with name, approximate age at start, tenure, what type of position they moved to, etc. The profile might also provide, if available, a list of all previous clergy in charge (i.e., prior to 30 years).

4. Staffing patterns: titles, number, hours, paid or volunteer? Note changes in recent years. Usually all staff are accountable to the rector who carries out the function with the advice of the wardens and/or vestry. Has that practice been followed in the parish? If not, what has been the practice? Note any difficulties in staff relationships.

a. Spiritual Direction: how focused is the parish on Christ and his claim on us? Is there a sense of being able to depend on God, to rest in him? Is there a climate of spiritual discipline, reflection and discernment (i.e., regular attendance at worship, Rule of Life, attendance at the Daily Office, continued study of Scripture, etc.)? Are people accepted and nurtured at all phases of maturity in faith and practice? Are people invited and equipped to go further? To what extent are people able to accept the priest as both a person and a symbol? Is there at least a significant core that makes use of quiet days, retreats, instruction in prayer life, etc? Is faithsharing a regular part of parish life?

b. Transforming Community: How well do parish leaders understand the parish as a local expression of the Body of Christ, the People of God; that it has a mission given by God? How focused is the parish and its various groups on the mission of the Church? Are people maturing in Christian life and practice? How does the parish enable that process? How is the parish a caring community, bearing each other's burdens and celebrating each other? How are disagreements handled? Do leaders understand basic norms for dealing with conflict as a Christian community? How are the Church's expectations and standards presented and upheld in regard to Baptism, marriage, First Holy Communion, confirmation, etc. (A way of thinking about standards is to seek to meet the proper claim of three elements: 1-the objective standards of the Church as seen in canon law, the Book of Common Prayer and its rubrics and the reasonable implications of each; 2-the person's individual situation and needs; and 3-implications for the parish, i.e., what is the "message" given in terms of evangelization, spiritual formation, the purpose of the Church, etc.)

OVERSIGHT (continued)

What smaller groups do people gather in, e.g., youth, ECW, Bible study, lay apostolate, reflection/prayer groups, etc. How do they function? Does each include some appropriate expression of worship, doctrine and action in its life?

How well does the parish live within the wider Church? e.g., participation in diocese and deanery, full payment of assessment and proportionate share, reflection of the best present practice of the Episcopal Church, ecumenical involvement and awareness, etc. How well does the parish include the diversity of its membership in its life (various age groups, families and singles, racial and ethnic groups, etc.)?

c. Institutional Management and Administration: What is the parish's use of the knowledge and methods of management and organization development? Has the parish a process of planned change, yearly assessment of parish life and ministry, a 3-5 year plan? Is there development of an informed, self-disciplined, faithful lay leadership? (i.e., intentional parish standards for lay leaders including a Rule of Life, tithing, training for jobs, regular attendance at meetings, annual retreats, etc). Are there clear decision-making processes? Effective financial property, and office management? Clear and appropriate use of authority? Does the parish conform to the standards of the Church in regard to business methods, etc? How is the vestry organized? How does it function? How is it elected? Provide information on financial trends, i.e., budget figures for 10 years ago, 5 years ago, last year, current year. What do you make of the figures? How is the budget developed? Describe sources of income (e.g., pledging, fundraising, endowments) and information on restrictions regarding each.

B. SUMMARY OF ASSESSMENT OF PARISH LIFE AND MINISTRY: OVERSIGHT

1. Rating Totals: Oversight

very dissatisfied ~~/~~ ~~/~~ ~~/~~ ~~/~~ ~~/~~ ~~/~~ ~~/~~ very satisfied

2. What did people say? Strengths, weaknesses, etc.

3. What is the committee's assessment? To what extent is there strength in this basic, essential area of parish life and ministry?

C. IDENTIFY AND EXPLAIN ANY RECURRING ISSUES OF PATTERNS IN THIS AREA OF PARISH LIFE.

D. DESCRIBE THE COMMITTEE'S UNDERSTANDING OF THE OBJECTIVES THE PARISH WILL NEED TO ADDRESS IN THE NEXT FIVE YEARS IN THE AREA OF OVERSIGHT.

IX. OVERALL ASSESSMENT OF PARISH LIFE AND MINISTRY

A. Overall Rating

very dissatisfied ~~/1/2/3/4/5/6/~~ very satisfied

B. Identify the major overall sources of dissatisfaction.

C. Identify the major overall sources of satisfaction.

X. FOUR KEY GOALS

Based on all the above, the Committee will need to identify four key goals that the parish should address in the next few years.

1.

2.

3.

4.

BIBLIOGRAPHY FOR PARISH PROFILE WORKBOOK

READINGS FOR REFLECTION

WORSHIP

1. Power from on High, "Worship," by the Rev. Robert A. Gallagher, pages 6-21, Ascension Press.
2. Liturgy for Living, Price and Weil, Seabury Press.
3. Canterbury and Rome by Robert Hale, Pariset Press, Ramsey, NJ 1982. (Chapter 3 discusses the spirit of Anglican worship).
4. Booklets on Liturgy from Associated Parishes, 3603 Mt. Vernon Ave., Alexandria, VA 22305.

DOCTRINE

1. Power from on High, "Doctrine," by the Rev. Robert A. Gallagher, pages 22-34, Ascension Press.
2. How it All Began by O.C. Edwards, Seabury Press, 1977.
3. Book of Common Prayer, Catechism, pp. 855 ff.

ACTION

1. Power from on High, "Action (Service, Evangelization, Stewardship)" by the Rev. Robert A. Gallagher, pages 35-51, Ascension Press.
 2. Incorporation of New Members in the Episcopal Church, by the Rev. Alice B. Mann, Ascension Press.
 3. Handbook for Evangelism, Episcopal Church Center, 815 Second Ave., New York, NY 10017.
 4. More Blessed to Give, by the Rev. John MacNaughton, Episcopal Church Center, 815 Second Ave., New York, NY 10017.
- The Christian Moral Vision, by Brill, Seabury Press.

BIBLIOGRAPHY, continued

OVERSIGHT

1. Clergy Leadership in Small Communities by the Rev. Alice B. Mann, Ascension Press.
2. Power from on High, chapter on "Oversight," by the Rev. Robert A. Gallagher, pages 52-76, Ascension Press.
3. Sizing Up a Congregation for New Member Ministry, by Arlin Rothauge, Seabury Professional Services, 815 Second Ave., New York, NY 10017. Contains useful insights on leadership and size.
4. Management of Organization, by P. Hersy and K. Blanchard, Prentice-Hall, Englewood Cliffs, NJ. Especially see the chapter on leadership style and the maturity of the system.
5. Reshaping a Congregation for a New Future by Arlin Rothauge, Episcopal Church Center, 815 Second Ave., New York, NY 10017.
6. Living in the Spirit by Hosmer and Jones, Seabury Press.

PARISH SURVEY QUESTIONNAIRE

This questionnaire is intended to be used by parish leaders as part of a process of planned change. Parish planning needs to be focused on the essentials of the Christian life and grounded in prayer, the Scriptures and waiting on the Lord.

The form may be part of the yearly parish self-assessment or within a search process. Modifications should be made as desired.

2. DOCTRINE: Holy Scripture, Tradition, Reason

	SATISFIED		DISSATISFIED		No Opinion
	Very	Some- what	Some- what	Very	
Christian Education Offerings for Adults					
Participation of Adults					
Christian Education Offerings for Children					
Participation of Children					
Christian Education Offerings of Youth					
Participation of Youth					
Bible Study Programs					
Seasonal Offerings (Advent, Lent, etc)					
Resources offered to assist Understanding of The Sacraments (Baptism, Eucharist, Marriage, etc)					
Resources offered to assist Understanding of the Bible and how to use the Bible for study & meditation					
Resources offered to assist Understanding of the Church's Tradition (the Catholic faith & tradition as received and lived in the Episcopal Church					
Resources offered to assist Understanding of the use of Reason in the Church's Doctrine					
Resources offered to assist Knowledge of the Structure of the Episcopal Church					
Parish library and other educational resources					
Congregation's awareness of what has authority in the Christian life					
Clear standards and thorough preparation for the Sacraments					

a. What are the most important strengths to be preserved in this area?

b. What areas can be improved?

3. ACTION: Evangelization, Service, Stewardship

	SATISFIED		DISSATISFIED		No Opinion
	Very	Some- what	Some- what	Very	
Encouraging non-members to join the parish in the Christian life					
Greeting, orienting and incorporating newcomers					
Visits to the Sick and Shut-ins					
Reaching out to members who lapse					
Personal Counseling and Spiritual Guidance					
Laity awareness of their ministry in the family, work & neighborhood					
Laity awareness of their ministry in the parish and/or wider Church					
Use of parish Facilities by Community Groups					
Service to the Community and The Region					
Service beyond the Community and The Region					
The annual Every Member Visitation					
Parish level of Pledging Support for sacrificial and proportionate giving with the tithe as the minimum standard of giving					
Parish Understanding of Stewardship					
Parish Understanding of Service					
Parish Understanding of Evangelization					
Parish Membership reflects the diversity of the community					

a. What are the most important actions/activities to be preserved?

b. What areas can be improved?

4. OVERSIGHT: The task of facilitating the parish in a full and strong participation in the Christian life; bring and preserving a proper order in the parish.

	SATISFIED		DISSATISFIED		No Opinion
	Very	Some- what	Some- what	Very	
Lay leaders theologically grounded and articulate					
Lay leaders show a mature, disciplined spiritual life					
Parish structures for annual self-assessment and planning					
Process for rooting our decision making in prayer, scripture and the Tradition of the Church					
Parish focus on the essentials of Christian life					
Parish Financial Strategy					
Condition of Parish Property					
Relationship with the diocese					
Our openness to being influenced by the wider Church					
Parish sense of direction					
How well the parish copes with change					
Parish focus on Christ and his claim on us					
People accepted and nurtured at all phases of Christian maturity					
People invited and equipped to go further in the Christian life					
Parish understanding of itself as a local expression of the Body of Christ, the People of God					
Parish understanding that it has a mission given by God					
Parish as a caring community					
History of clergy - lay leader team work					
How disagreements and conflict are dealt with in the parish					
Long-range planning					
Structures "fit" size of parish					
Regular recruitment and training of new lay leaders					
Information is readily available on what is happening in the parish					
Information is readily available on who is responsible for key ministries					

a. What are the most important oversight strengths to be preserved?

b. What areas can be improved?

8. The Rector's Work

WORSHIP:

	SATISFIED		DISSATISFIED		No Opinion
	Very	Some- what	Some- what	Very	
Seems to have a good background of knowledge about liturgy					
Explains and presents liturgical practices informatively					
Maintains a full and appropriate schedule of liturgical services					
Is faithful to the Book of Common Prayer					
Conducts liturgical services gracefully, smoothly and with dignity					
Promotes centrality of the Eucharist and use of the Daily Offices					
Encourages recognition of the seasons of the liturgical year					
Is helpful in guiding people in their personal prayer lives					
Challenges people to develop and improve their spiritual lives					
Gives evidence of being a person who lives a sincere and deep prayer life personally as well as teaching it to others					

DOCTRINE

Is knowledgeable about the doctrine and teachings of the Church					
Provides ample opportunity for adult education in the parish					
Adult education covers a variety of subjects and areas of interest					
Supports and encourages Christian education for children					
Provides ample basic instruction in Christian fundamentals					
Is responsive to the educational needs of the parishioners					
Truly believes and practices what she/he teaches and preaches					

ACTION:

	SATISFIED		DISSATISFIED		No Opinion
	Very	Some- what	Some- what	Very	
Encourages people to do Christian service in their own lives					
Encourages the parish to undertake Christian service projects					
Preaches and teaches the social responsibilities of Christians					
Promotes the development of Christian Community in the parish					
Encourages a sense of Christian vocation for all baptized people					
Provides helpful counseling and advice when needed					
Encourages participation in deanery and diocesan activities					
Encourages corporation action of evangelization					
Encourages serious stewardship of all aspects of our lives					

OVERSIGHT

Works cooperatively with the lay leadership of the parish					
Helps facilitate lay ministry in the parish					
Demonstrates clarity of distinctions between lay and clergy roles					
Manages the parish into an appropriate and full living of Christian Life					
Is willing to risk showing human weaknesses					
Receives constructive criticism well					
Makes me feel I could go to her/him with personal problems					
Is trustworthy, keeps confidences and is reliable					

a. What are the most important areas of the rector's ministry to be preserved?

b. What areas would you like to see strengthened?

9. Please give this general information about yourself.

<input type="checkbox"/> Male	<input type="checkbox"/> Age Under 20	If you are married:	
<input type="checkbox"/> Female	<input type="checkbox"/> 20-30	<input type="checkbox"/> My Spouse -	<input type="checkbox"/> My Children -
<input type="checkbox"/> Married	<input type="checkbox"/> 30-40	<input type="checkbox"/> Attends this Church	<input type="checkbox"/>
<input type="checkbox"/> Widowed	<input type="checkbox"/> 40-50	<input type="checkbox"/> Attends another Church	<input type="checkbox"/>
<input type="checkbox"/> Single	<input type="checkbox"/> 50-60	<input type="checkbox"/> Does not attend	<input type="checkbox"/>
<input type="checkbox"/> Single Parent	<input type="checkbox"/> 60-70		
<input type="checkbox"/> Divorced	<input type="checkbox"/> Over 70		

Do you attend worship:	Usually Attend:	Attending Here:
<input type="checkbox"/> Weekly	<input type="checkbox"/> 8:00 AM	<input type="checkbox"/> Less than 2 Years
<input type="checkbox"/> 2-3 times a month	<input type="checkbox"/> 10:00 AM	<input type="checkbox"/> 2-5 Years
<input type="checkbox"/> About once a month		<input type="checkbox"/> 5-15 Years
<input type="checkbox"/> Infrequently		<input type="checkbox"/> Over 15 Years

Member of the Vestry

Are you:

A lifelong Episcopalian here (Baptized and Confirmed in the parish)
 A lifelong Episcopalian transferred from another parish
 Confirmed or Received from another denomination (_____)
 Not Confirmed or Received but consider this my Church Home
 Other: _____

Education

Primary (Grammar) School
 Secondary (High) School
 2-Year College
 4-Year College
 Graduate School

Occupation:

Running a household
 Part-time Work
 Full-time Work
 Retired
 Not Employed

THANKS FOR YOUR HELP!

Your Name: _____

Ascension Press, 1987

With thanks for the contribution
of the Rev. John-Julian Swanson, OJN;
Mr. Kenneth A. Wood, Jr. and the
Diocese of Connecticut Consultants

PARISH ASSESSMENT

Please fill in this worksheet by placing a check that indicates your assessment of the parish's progress or lack of progress in each area.

	Much Weaker	Somewhat Weaker	Parish Has Become - No Change	Somewhat Stronger	Much Stronger	Comments
1. Overall parish life and ministry Strength and stability of parish's life and ministry in worship, doctrine and action; sense of being a local expression of the Body of Christ; sense of mission, etc.						
2. Worship (Climate; appropriate use of the Holy Eucharist and Daily Office; teaching for prayer life and participation in liturgy; functioning of guilds and individuals that play special roles - altar, chalice bearers, greeters, acolytes; schedule; participation, etc.)						
3. Doctrine (The Christian formation of adults and children; providing the necessary offerings and support structures - lay catechists, a basic adult course, library, tracts, church school, etc.; the parish's awareness of what has authority in the Christian Life; how well we know the teachings of the Faith, etc.)						
4. Action (Corporate action of service, evangelization, stewardship; lay members' awareness of their ministry in the Church and world, etc.)						
5. Oversight (Clergy and Lay Leaders serving, guiding, leading and managing the parish into an appropriate and full living of the Christian life; bringing and preserving a proper order/shape in the parish's life).						

Much Weaker	Somewhat Weaker	Parish Has Become No Change	Somewhat Stronger	Much Stronger	Comments
-------------	-----------------	-----------------------------	-------------------	---------------	----------

6. Rector or Vicar

Competence for oversight and leadership of parish life and development, quality of relationship with congregation; has a disciplined spiritual life; accepts identity as a priest, etc.

7. Lay Leadership

Theologically grounded and articulate; have a disciplined spiritual life; aware of vocation and gifts; etc.

8. Parish development structures

Yearly evaluation of parish life and ministry; a yearly clergy assessment; a process of planned change; a parish base for Christian discernment; use of a framework that focuses the parish on essentials of the Christian life; has a way to monitor parish life and development; etc.

9. Relationship to Community/Neighborhood

Membership reflects the diversity of the community; involved in and serving the community; ongoing ministry of evangelization; a plan for the inviting and incorporation of people; open/welcoming; good physical location, etc.

10. Financial

Sacrificial and proportionate pledging; adequate endowment fund, budget; potential for self support of priest full time and a full parish life and ministry (in 5 years, 10 years) - or an alternative that provides for a long term, stable priestly ministry with adequate time to support ongoing ministry and development; not dependent on fund raising activities, etc.

	Parish Has Become -					Comments
	Much Weaker	Somewhat Weaker	No Change	Somewhat Stronger	Much Stronger	
11. Buildings and property Condition, energy efficiency, pattern of regular upkeep and improvement, adequacy for membership growth; quality of liturgical space, long range property plan; etc.						
12. Receptiveness to appropriate influence and collaboration Relationship with Bishop's Office and Diocese, other parishes, deanery; use of consultants and other outside resources; living within the doctrine, discipline and worship of the Episcopal Church; etc.						
13. Efforts in program and ministry Rooted in the Christian faith as known and lived in the Anglican tradition; working to build lasting structures and an institutional base rather than the ad hoc projects; desire for long-term staying power; etc.						
14. What is the potential for expanding, enriching, deepening the parish's life and ministry in the foreseeable future? -spiritual life, membership growth, outreach; etc.						
15. What are the three most important goals this parish needs to address in the next three years to increase in faithfulness and effectiveness as an expression of the Body of Christ?						
a.						
b.						
c.						

9. Efforts in program and ministry

Rooted in the Christian faith as known and lived in the Anglican tradition; working to build lasting structures and an institutional base rather than the ad hoc projects; desire for long-term staying power; etc.

Very

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Weak

1	2	3	4	5	6
---	---	---	---	---	---

 Very Strong

Weaknesses

Strengths

Parish Revitalization Assessment

This assessment form is a tool to help parish leaders review certain critical areas which affect the readiness of the congregation to engage in its own revitalization. The form can be used to identify those areas which require special attention if we are to have an adequate base for a faithful and effective process of revitalization.

1. Overall parish life and ministry

Strength and stability of parish's life and ministry in worship, doctrine and action; sense of being a local expression of the Body of Christ; sense of mission, etc.

Very

--	--	--	--	--	--

Weak

1	2	3	4	5	6
---	---	---	---	---	---

 Very Strong

Weaknesses

Strengths

10.

What is the potential for expanding, enriching, deepening the parish's life and ministry in the foreseeable future? -spiritual life, membership growth, outreach; etc.

Very

--	--	--	--	--	--

Weak

1	2	3	4	5	6
---	---	---	---	---	---

 Very Strong

Weaknesses

Strengths

2. Rector or Vicar

Competence for oversight and leadership of parish life and development, quality of relationship with congregation; has a disciplined spiritual life; accepts identity as a priest, etc.

Very

--	--	--	--	--	--

Weak

1	2	3	4	5	6
---	---	---	---	---	---

 Very Strong

Weaknesses

Strengths



3. Lay leadership

Theologically grounded and articulate; have a disciplined spiritual life; aware of vocation and gifts; etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

4. Parish development structures

Yearly evaluations of parish life and ministry; a yearly clergy assessment; a process of planned change; a parish base for Christian discernment; use of a framework that focuses the parish on essentials of the Christian life; has a way to monitor parish life and development; etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

5. Relationship to Community/Neighborhood

Membership reflects the diversity of the community; involved in and serving the community; ongoing ministry of evangelization; a plan for the inviting and incorporation of people; open/welcoming; good physical location, etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

6. Financial

Sacrificial and proportionate pledging; adequate endowment fund, budget; potential for self support of priest full time and a full parish life and ministry (in 5 years, 10 years) - or an alternative that provides for a long term, stable priestly ministry with adequate time to support ongoing ministry and development; not dependent on fund raising activities; etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

7. Buildings and property

Condition, energy efficiency, pattern of regular upkeep and improvement, adequacy for membership growth, quality of liturgical space; long range property plan; etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

8. Receptiveness to appropriate influence and collaboration

Relationship with Bishop's Office and Diocese, other parishes, deanery; use of consultants and other outside resources; living within the doctrine, discipline and worship of the Episcopal Church; etc.

Very	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weak	1	2	3	4	5	6	Strong

Weaknesses Strengths

PARISH DEVELOPMENT OR REVITALIZATION AGREEMENTS

+A parish-diocese expression of mutual support and accountability.

These agreements are made with the Bishop, through the Congregational Development Officer. An agreement is intended to establish objectives that enable the parish to take the next necessary step in its development.

The purpose of a Parish Revitalization Agreement is to state the parish's primary objectives for revitalization and development over the next two to three years and what will be done by the parish, the rector, and the diocese to accomplish those objectives. The agreement focuses on and highlights those objectives or ministries that will receive the special attention of the parish, rector and bishop's office for the next few years.

The agreement is created in a consultant-led process that includes the parish's study of standard parish development goals and methods; a review of the community's needs and trends; a self assessment of parish life and ministry; possibly a peer visit and report; and a consultant-led process of reflection, discernment and planning. The rector, vestry and parish development team work together to create draft statements that are shared with the Congregational Development Officer who responds with additional suggestions and any needed clarification of diocesan expectations. An agreement will usually go through two or three drafts in its development.

The following provides the general outline that is used in creating an agreement.

BACKGROUND

A brief statement of the parish's efforts toward development or revitalization and the process leading up to the agreement in the last few years.

PURPOSE AND OBJECTIVES

A statement regarding the broad purpose of the revitalization ministry and a list of the primary objectives for the period of the agreement. The objectives should clearly fit the parish's current place in a parish life cycle, stage of development and community context.

TIME PERIOD

When does the agreement begin and end?

THE PARISH WILL:

A statement of what the parish will do over the period of the agreement to accomplish the objectives. This might include the equipping of people for ministries, the use of certain workshops and a description of a consultative relationship.

THE RECTOR WILL:

A statement of what the rector will do. This might especially attend to parts of the rector's job description which need special attention. (sample copies of a job description are available from the Congregational Development Officer).

THE BISHOP'S OFFICE, PRIMARILY THROUGH THE CONGREGATIONAL DEVELOPMENT OFFICER WILL:

A statement of what the Bishop's Office will do including a general statement of support for the objectives; commitment to special funding of new ministries, new fellowship, or other evangelization ministry; an understanding of how often the Congregational Development Officer will meet with the rector, parish development team and/or vestry.

REVISION

A statement to the effect that the agreement may be revised by mutual agreement.

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