

Record of an Episcopal Visit

Diocese of Mid-America
Reformed Episcopal Church



Name of Parish _____

Visit conducted ___/___/___

by _____

Revised October 2017

Introduction

Beginning with only a handful of parishes and missions, the Diocese of Mid-America REC continues to grow as we seek to fulfill the great Commission.

As our diocese has grown and expanded, it is evident that we need additional structure to maintain good record keeping, and to facilitate continued growth and continuity of mission.

We currently have two bishops making Episcopal visits. In some cases, this may be the first time a bishop has met with a particular parish or mission. With continued growth, a parish may receive oversight from more than one bishop. 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 case of celebration, which is appropriate. It is also a time when other meetings can take place between the Bishop, Vestry and Rector. Time should also be allowed for 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. The role of a Coadjutor or Suffragan is that of the official representative of the Ordinary.

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.

Parish Preparation for Episcopal Visit

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

1. Parish Evaluation Form: The wardens and each member of the Vestry should complete the Parish Evaluation Forms
2. Rector's Report Form: The Rector should complete the Rector's Report Form
3. Clergy Review Form: Each assisting member of the clergy serving in the parish, including any deaconesses, should complete the Clergy Review Form.
4. The following forms/items should be provided for the bishop:
 - a. A current list of Communicants and Baptized members with addresses and telephone numbers.
 - b. A current year financial statement (less than 45 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 Sr. Warden and Treasurer.
 - d. A list of all bank or investment accounts maintained by the parish and the current balances.
 - e. A current copy of the Parish Bylaws, clearly noting any changes made since the last Episcopal visit, signed by the Sr. Warden and Secretary as true and authentic.
 - f. A current copy of the Articles of Incorporation or Articles of Association, if applicable.
 - g. A list of Parish officers and telephone numbers and addresses, signed by the Sr. Warden and the Secretary as true and authentic.
 - h. 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.
 - i. A copy of the contract or other agreement between the Parish/Mission and its Rector/Vicar.
 - j. A list of confirmands or baptismal candidates for the Bishop's visit should be provided at least 14 days prior to the scheduled visit.
 - k. The Parish Register should be available for inspection.

Vestry Members and Wardens Parish Evaluation Form

Today's Date: _____ Serving on Vestry since _____

Name of Parish: _____

Name of Vestryman: _____

Office Held: (Vestry Member, Jr. Warden, Sr. Warden): _____

Rector or Vicar Performance Evaluation

In your opinion, rate the Rector's performance in each of the following areas with a "1" being very weak and "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:

1 2 3 4 5 N/Q

2. **Evangelism.** Calls on visitors and newcomers, works to make church grow. Teaches the Great Commission as focus of ministry.

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 weaknesses (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: | | |
| A. Attend Sunday School | Yes | No |
| B. Attend Bible Study | Yes | No |
| C. Tithe / Committed to Tithing | Yes | No |
| D. Attend church at least three times a month | Yes | No |
| E. Are personally involved in the following ministries: (please 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/concerns: _____

Parish Statistical Report

Name of Parish: _____

Date: _____

Mailing Address: _____

Church Office Phone #: _____

Is Parish Incorporated? Yes No Does Parish rent or own its place of meeting?: _____

If renting, terms of lease: _____ Is property owned outright or mortgaged?: _____

Balance: \$ _____ If mortgaged, who holds the mortgage? _____

Phone number of mortgage company? _____

Value of land: \$ _____ Value of Building (s): \$ _____ Year constructed _____

Current Active Membership Data

Date parish records last examined: _____

Communicants: _____ Baptized Members: _____

Total active members as of last examination: _____

Total inactive members as of last examination: _____

Additions:

Baptisms: _____

Confirmations: _____

Transfers in: _____

Subtractions:

Deaths: _____

Excommunication: _____

Transfers out: _____

Moved to inactive: _____

Certified by:

Rector Date

Secretary or Parish Clerk Date

Sr. Warden:

Name: _____

Address: _____

Phone: _____

Email: _____

Jr. Warden:

Name: _____

Address: _____

Phone: _____

Email: _____

Secretary:

Name: _____

Address: _____

Phone: _____

Email: _____

Rector's Evaluation of the 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 with a "1" being very weak and "5" being very strong. .

A. Stewardship of Time 1 2 3 4 5

B. Stewardship of Talent 1 2 3 4 5

C. Stewardship of Treasure 1 2 3 4 5

D. Support of Sunday school, Bible study, etc. 1 2 3 4 5

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 parish's greatest accomplishment in the past year?

10. Other

Bishop's use—Do not write below this line

Assisting Clergy Evaluation

(to be completed in advance of an Episcopal Visit by each assisting clergy at the parish, including Deaconesses.)

Name: _____ Bishop Priest Deacon Deaconess

Date called to parish: _____ Title: _____

Compensation: _____ or Non-stipendiary _____

Duties:

Comments:

Rector Date

Clergyman Date

Checklist

Episcopal visit of _____ Parish on ___/___/___

- _____ 1. Parish Statistical Report
- _____ 2. Membership List
- _____ 3. Current Financial Statement (income statement & balance sheet) dated _____
- _____ 4. Year end Financial Statement (income statement & balance sheet) dated _____
- _____ 5. List of Bank and Investment Accounts and Balances within 30 days of visit
- _____ 6. Current Bylaws of Parish. Date of last revision ___/___/___
- _____ 7. Articles of Incorporation/Articles of Association Date of last revision ___/___/___
- _____ 8. List of Parish Officers and telephone numbers (day and evening)
- _____ 9. Minutes of the last Annual Parish Meeting held on ___/___/___.
- _____ 10. Minutes of any Special Parish Meetings
- _____ 11. Copy of Employment Agreement, Call, or Contract between Rector/Vicar & Parish
- _____ 12. List of persons to be Confirmed/Baptized (send 14 days or more in advance visit)
- _____ 13. A Parish Evaluation form from each member of the Vestry
- _____ 14. The Rector's Parish Evaluation Form
- _____ 15. An Assistant Clergy Evaluation form for each assisting clergyman
- _____ 16. Parish Register
- _____ 17. Other requested information

Comments:

Signed _____