

Letter From Presbytery Healthy Congregations Committee

Greetings of grace and peace from the San Francisco Presbytery Healthy Congregations Committee:

Our committee is aware that one of the following situations will or has occurred in your church:

Pastor/Associate Pastor position is vacant
Seeking new Pastor/Associate Pastor position for the church
Pastor/Associate Pastor has given notice to leave position
Church is seeking to assess the state of health of the congregation
It has been 5 years since your last Mission Study Process

We are excited about the opportunity to work with your congregation as you begin the process of your Mission Study Report, whether you are calling a new pastor or wish to assess the health of your church. We hope the Mission Study process will be a spiritual practice to enable your congregation to listen to how the voice of God is moving in your midst. It can be an exciting time of renewal and rebirth. Our purpose is to be a resource to you throughout this process.

Our interest is the health and vitality of your congregation. Often times there are many different points of reflection to consider in order to move forward in as healthy a way as possible. For this reason, the mission study process may take some time (usually a minimum of eight months.) Please do not be daunted by this time frame. While we recognize that being in transition is never easy, many congregations have found the time of reflection and discernment during the mission study period to be invaluable for the success and health of their future ministry. We believe God is with you in this process.

This practical step-by-step guide has been developed to assist you in leading the Mission Study Team and the church through the Mission Study Process. After an exit interview with the session has been completed and your Mission Study Team (MST) has been formed, (see chart on page three for steps in the process) your HC liaison will facilitate an orientation of the mission study process with the Mission Study Team. After the team has had a chance to assess the body of its work together, we recommend that a general target time frame be set by the Mission Study Team, recognizing this time frame may be revised as needed in your work with the liaison.

If you have any questions, please contact your Healthy Congregation Liaison. If one has not been assigned, contact the San Francisco Presbytery Office at (510) 849-4393. The Presbytery Office will notify a member of the Healthy Congregation Committee who will then contact you.

Blessings on your journey of renewal and rebirth!

In the service of Christ,

The Healthy Congregations Transitions Team

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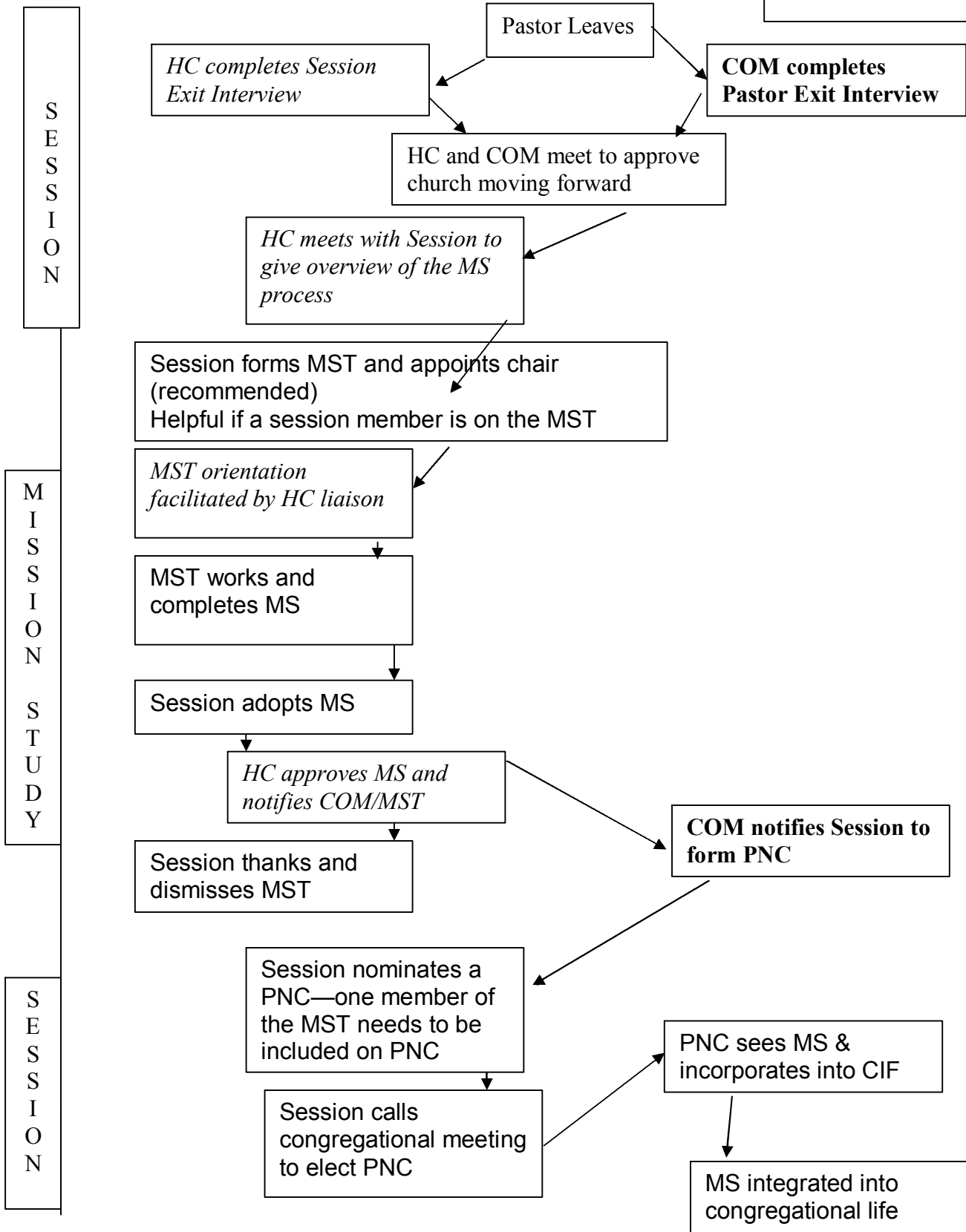
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Map Overview of the Mission Study Process

HC – Healthy Congregations
COM – Committee on Ministry
MS – Mission Study
MST – Mission Study Team



Session's Responsibilities

Before the Mission Study begins, Session has the following responsibilities:

Session initiates the Mission Study Process by contacting Presbytery

In the event of a pastoral vacancy, the Clerk of Session makes an official inquiry to Presbytery regarding "Pastoral Search" process. Session meets with the Healthy Congregations Committee to complete the Session Exit Interview after a Pastor/Associate Pastor has left.

or

The Clerk of Session/Church Pastor notifies the Healthy Congregations Committee of Presbytery of intent to assess the health of the congregation.

Session then Appoints the Mission Study Team

The Session is responsible for the mission study and appoints a well-represented committee to complete the study. Please use the following as a guide to determine the size of the team:

Congregations of under 100	3-5 team members
Congregation of 100-300	5-7 team members
Congregation of 300-600	7-11 team members
Congregations over 600	9-13 team members

The membership of the Mission Study Team needs to reflect the composition of the congregation. As the Session selects the members of the team, it is extremely important that the team members have diversity of skills and experience. It is important to have the input of those who have served on church committees. However, this should not be the primary factor in deciding who should be appointed to the team.

All prospective members should be either knowledgeable of, or capable of ascertaining the following information:

- Membership and history of the congregation
- Church finances over a 5 to 10 year period and/or during the tenure of the last pastor.
- Demographics of the community, where the church is located, population changes, economic changes, community institutional changes and changes in residential composition, i.e., from residential to small industry, small industry to residential, etc.

Session should consider persons who are cooperative, industrious and who can take initiative, as well as be effective team members. The amount of work and time members of the Mission Study Team invest is significant, and persons willing to do their share both individually and cooperatively will ease the overall tasks of the committee.

It is beneficial to identify a person, with appropriate experience and skills to serve on both the Pastor Nominating Committee and the Mission Study Team. This type of linkage and consistency is highly desirable. Ideally, this person will not serve as the Chair of either committee. The continuity and shared information between the Mission Study Team and the

Session's Responsibilities

Pastor Nominating Committee is invaluable. The completion of the Church Information Form (CIF) is a task of the Pastor Nominating Committee. The Pastor Nominating Committee will depend on information from the Mission Study to complete the Church Information Form. Having a member who worked on the Mission Study Report will be very valuable at this time.

Session Appoints the Chair of the Team

Decision in appointing a chair should be based on leadership, organization and administration skills, coupled with relational and interpersonal skills. The chair of the committee must understand the purpose of conducting a mission study and be able to facilitate the work required in accomplishing this goal. She/he does not do all of the work and should be able to delegate assignments to members of the committee. However, the chair is a member of the Mission Study Team, and does participate in completing its tasks.

It is important to coordinate the selection of the chair of the Mission Study Team with the selection of the chair of the Pastor Nominating Committee (PNC), so that leadership skills of individual church members are carefully considered.

Session provides Financial support for the Team

Session needs to authorize funds to be used by the Mission Study Team to cover such expenses as:

- Purchase of resources, study aids, etc.
- Information gathering tasks
- Acquiring demographic data
- Meeting expenses

The amount should be enough to cover costs for the overall work of the team. A sum of approximately \$500 to \$1000 is average.

After the Mission Study Team process, Session has the following responsibilities:

Session Reviews & Adopts the Mission Study Report

When the Mission Study Report is in final draft form, the team submits it to the Session for review. Session can make any final revisions and move toward adopting the report.

A goal for Session is to promote ownership of the report by the congregation, as the envisioned mission. It will be the congregation's responsibility to move the church in the direction of their new mission.

Once Session adopts the Mission Study Report, Session requests the Mission Study Team draft a cover letter and submit the report to the S.F. Presbytery Healthy Congregation Committee for review, comments and approval.

Session's Responsibilities

Session's Final Action with the Mission Study Team

Once Session is informed by Presbytery that the Mission Study Report has been approved, Session should acknowledge the work of the Mission Study Team and dismiss the team with an official motion and vote that is recorded in the Session minutes.

Session Checklist

Before the Mission Study Process Session should:

- Complete the exit interview (in the case of a pastoral vacancy)
- Notify Presbytery of intent to assess congregational health
- Appoint a Mission Study Team
- Appoint the chair of the Mission Study Team
- Provide financial support

After the Mission Study Process Session should:

- Review and Adopt the Mission Study Report
- Thank and Dismiss the Mission Study Team
- Reflect on implementation of the Mission Study into life on congregation

Interim Pastor, Stated Supply or COM Representative's Responsibilities

The role of the Interim Pastor, Stated Supply or Committee On Ministry representative during the mission study is one of support, communication and coordination.

A meeting between the Interim or Stated Supply Pastor, the Chair of the Mission Study Team and any appointed Presbytery liaison will occur to determine their roles with the Mission Study Team. By so doing, the Interim or Stated Supply Pastor can help interpret “what’s going on” to the Session, and to the congregation.

Time should be designated when the Interim Pastor, Stated Supply or COM Representative will create an opportunity for the congregation to share joys of the past as well as to begin to come to terms with issues of the past.

Pastoral leadership can assist the Mission Study Team by providing adequate opportunities to complete their work and report their findings. This can include:

- Docket time on the agenda of the Session meetings
- Reporting opportunities during worship and celebration times
- Space in church newsletters, listservs, websites and other congregational communications

Overview of the Mission Study Team Process

Once the Session has completed its work the Mission Study Team process begins. The task of the Mission Study Team is to study and report on the past and current culture and health of the congregation and compose a mission statement that will provide direction for the church's journey as a proclaiming, witnessing, and serving Christian congregation over the next 5 to 10 year period, or during the tenure of the next pastor.

Orientation with Healthy Congregations Liaison

The Mission Study Team Chairperson will arrange a meeting between Healthy Congregation Committee Liaison, Pastor and the team. At this meeting, the Healthy Congregation Liaison will go over the Mission Study Process, the Mission Study Guide, roles of team members and share the importance of understanding the first five chapters of the Book of Order and key scriptures.

Congregational Health and the Mission Study

As you begin your work it is important to know what the Healthy Congregations Committee will be looking for in its evaluation of your final Mission Study. While there are no "right" or "wrong" answers there are some measurable components that will help you in developing a good foundation for the future. It is the intent of the Healthy Congregations Committee that in the process of answering these questions you and your congregation will make the wonderful discovery of God's plan for your congregation.

Prior to completion of the mission statement, the team will undergo a comprehensive reflection upon the history, review the current status and set direction for the future of the congregation in the areas of:

- . Spiritual health
- . Membership and church growth
- . Finances & stewardship
- . Pastoral leadership
- . Mission and social justice
- . Its role and relationship to the community where it is located
- . Its relationship to Presbytery.

Understanding the nature of congregations the Healthy Congregations Committee will take both an objective and subjective view of the mission study. Mission Study Teams are encouraged to use the Mission Study Checklist found in Appendix A of this handbook, the Congregational Health Questions found in Appendix C of this handbook, and the Great Ends of the Church found in Chapter 1 of the Book of Order to guide their work. The Presbytery will review the Mission Study Report with all these guidelines in mind.

The Study Process

The study process will include time for: congregational reflection, gathering and analyzing data (demographics, financial information, church programs and activities etc...), and envisioning the future of the congregation and its ministries.

Overview of the Mission Study Team Process

The Mission Study Report

The report is a summary of the study which gives the reader a sense of where the congregation has been, where they are now and where they are going. Mission Study Reports take many forms but generally include: history of the congregation, summaries of the gathered information, narrative analysis of the gathered information, financial reports and analysis, goals and objectives for the future and a Mission Statement.

The Mission Statement

From the process of studying the congregation and writing the report, the Mission Study Team will be writing a Mission Statement that will guide the congregation over the next 5-10 years. See examples in Appendix D.

Completing the Process

The Mission Study Team completes its work when the report it submits to the Session provides an accurate analysis of the current status and condition of the congregation's health and is accompanied by a mission statement that provides mission directions for the congregation. The mission directions should be in the form of goals with measurable objectives and activities, which support the achievement of the mission goals for the near and distant future of the church.

Reviewing and Approval the Mission Study

Once the report is complete, it is submitted to the church session for review and adoption.

Upon adoption, a cover letter is written by the Mission Study Team and submitted to Presbytery for review and approval.

Completed Mission Studies should be sent on white paper single sided to:

San Francisco Presbytery
ATTN: Mission Study Reports
2024 Durant Ave.
Berkeley, CA 94704

Or emailed in a Word document to
dmiller@sfpby.org

Mission Study Team Process and Responsibilities

A few tips before getting started

The Healthy Congregation Committee strongly encourages taking minutes during team meetings. These minutes are not part of the Mission Study Report submitted to Presbytery, but should be viewed as important church documents giving insight into how the Mission Statement was developed.

The study process is not a list of tasks to be checked off, and the process of studying a congregation often takes longer than expected. The Healthy Congregations Committee encourages Mission Study Teams not to rush through the Mission Study process. Accurately assessing the congregation's current health and future direction is a considerable undertaking and the result of the study – the Mission Statement, goals and objectives – will have long term implications for the whole congregation.

Involve the Congregation, keep them informed and invite their feedback at key times of discernment. Remember that in the end, the congregation will be responsible for carrying out the congregations missions.

The following pages are a more in-depth description of the Mission Study Process. This is a guide – not set in stone – and has been put together to help Mission Study Teams get started, utilize available resources and to let the team know what Healthy Congregations will look for in a completed study, report and statement. As you use this guide, please help us improve it by giving us your feedback. (A form can be found in Appendix M)

It may help to take a look at the sample timeline located in Appendix E to help the team think about how to organize the work.

Getting Started

Congregational Reflection Time

This is a vital part of the process of developing an honest and effective Mission Study. Thorough reflection on the past and current church culture and story provides opportunities for people to share brokenness and joys of their church and their experience as part of the community. While tempting, do not shortchange this stage in the process. Issues left unspoken will undoubtedly come back at a later time.

During this time of reflection the congregation should address the questions:

1. What are the biblical images for the story of this congregation?
2. Under what circumstances did the previous pastor leave and what have been the effects on and reactions from the congregation?
3. What are the major events in the history of this church that have affected the church today?

Mission Study Team Process and Responsibilities

4. Was there a “High Point” or “Glory Days” time of the church? If so, what did that look like, what aspects of that time still exist and what, if changes occurred, brought about those changes?
5. What have been the most difficult “inside” issues facing the congregation over the past 20, 10 and 5 years and what have been the effects on the congregation?
6. What have been the most difficult social and cultural issues facing the congregation over the past 20, 10 and 5 years and what have been the effects on the congregation?

The reflection piece, like others, can be done in a variety of ways. Because this part is highly subjective and often more heart centered, it is important to keep the following in mind:

- Keep confidential information confidential. Check with folks about what is okay to share with the larger community.
- Share the joys and pains of the church. Chances are most folks already know them, but have not had the opportunity to speak about them.
- It is possible that the congregation may discover “skeletons in the closet” during this reflection time. Please know this is a healthy part of the process; if dealt with directly it can lead to greater health of the congregation.
- Enter this stage with a spirit of prayer and discernment. There will plenty of time later for an analytical approach.
- The reflection time is not a time to change people’s minds about past or current culture. This time is only for people to reflect on their experience as part of the community.

There are many ways to do congregational reflection but the most important thing is to make sure that the congregation gets a chance to participate. We suggest offering several ways for people to participate.

Resources: ‘Involving the Congregation’ – Appendix F; ‘Additional Resources’ – Appendix K

Fact Gathering and Analysis

The team will need to gather facts in various areas listed in this section. It is recommended that the work be divided among the team members and should be accomplished between meetings.

During meetings, the work should be shared with the entire team for the purpose of educating each other regarding where the church was, currently is, and provoke thoughts on where the church might be in the future. This is also a time for other team members to dialogue and identify some trends of the church based on the facts presented.

New concepts, ideas or assessments should be added to individual reports. All this information along with God’s presence will allow the team to create the new church mission during the envisioning time.

Mission Study Team Process and Responsibilities

Congregational Membership

Facts: Conduct a review of the current membership of the congregation over a 5 to 10 year period and record your findings on the “Congregational Membership Template” (Appendix G)

Analysis: Review the facts and write an analysis keeping in mind the following:
Age spread
Gender of members
Tenure of members racial/cultural composition
Residential location of members by distances to the church
Major membership changes (+ or -) in relationship to the 5-10 year period or the tenure of the last pastor.

This information will be used in determining potential communities and relevant goals and objectives.

Resources: Church Membership rolls (5-10 years); Congregational databases; Church directory; Session records

Involve the Congregation: Have members mark their homes on a city map; use a church timeline to determine how many members have joined in the last 5 years, 10 years, 15 years etc...

Inventory of Existing Church and/or Community Program Activities

Facts: Conduct a review of the existing church program activities over a 5 to 10 year period and record your findings on the “Inventory of Existing Church and/or Community Program Activities Template”. (Appendix H)

Analysis: Review the facts gathered on program activities and write an analysis keeping in mind the following:
Why the program activities were instituted
Brief history of each program
Program’s current health
Current connection to the church, if different from why it was instituted.
Does the program fit into the overall ministry of your congregation?

Resources: Current annual report; newsletters/bulletins that list current programs and activities

Involve the Congregation: Use newsprint or flip charts and have people list the church activities in which they participate.

Mission Study Team Process and Responsibilities

Financial Status

- Facts:** Conduct a review of the financial status of the congregation over a 5 to 10 year period to the present. Record your findings on the “Financial Template”. (Appendix I)
- Analysis:** Review the facts gathered on finances and write an analysis keeping in mind the following:
Total resources and assets of the congregation
Annual sources of congregational income which includes membership pledges; special gifts by members; building fund contributions; endowment income; investment income; facilities use fees and/or rental income.
Calculate what percentage each source of income represents of the total annual income
Church’s annual and long range stewardship program
Major membership changes (+ or -) in relationship to the 5-10 period or the tenure of the last pastor
- Resources:** Financial statements for the last 5-10 years; Session records; Membership rolls

Community Demographics

- Facts:** Conduct a review of the demographics of the community (3-5 mi radius or as appropriate for your congregation) where the church is located over a 5-10 year period, or during the tenure of the last pastor. Record your findings on the “Demographics Template” (Appendix J)
- Analysis:** Note major changes with explanatory comments. If the community is currently undergoing major changes, note the changes by explaining what they are and why they are taking place.
- When the church and community demographics are complete, compare what is in the immediate community where the church is located and what is represented in the current membership of the congregation. Remember to get as much information as you can about economics, education, ethnicity, age, mobility, etc.

Resources: Community Demographics - Government agencies, realtors, internet searches, National Ministries Division PC (USA), *Percept* (a non-profit organization specializing in developing demographic reports to help churches in their mission planning.)
Congregational Demographic - *Demographic Reports and Ten Year Trends of Your Congregation* Research Services ~ Congregational Ministries Division 100 Witherspoon Street, Room 2620 ~ Louisville, KY 40202-1396 www.pcusa.org

Mission Study Team Process and Responsibilities

Pastoral Leadership

Reflection: Reflect on how the pastor(s) was involved in implementing the mission of the congregation over the last 5-10 years.
Reflect on what styles of leadership have worked well and what styles were more challenging for the congregation.
What has the congregation learned about itself from this reflection of prior pastoral leadership?

Analysis: Describe the kind of pastoral leadership that is now needed to further the mission of the congregation. There is no template for this area.

Resources: Session Records; Church historical documents; stories of congregation members

Mission Study Team Process and Responsibilities

Data Analyzing Time

At this point, it is time to begin an analysis in a broader context. A thorough analysis of the gathered information will answer the following questions. The Mission Study Team may also think of other analytical questions that will elicit pictures of change.

Be specific and provide explanatory comments.

What does the information reveal about the characteristics of the congregation, its membership, and its perceived identity as a congregation?

What are the striking changes that have occurred in the congregation's membership over the last 5, 10 or 15 years?

What are some recognizable shifts in the membership? What factors have caused the shifts in membership?

If there were no changes in the membership, why?

What does the information reveal about the human and financial resources of the congregation? What major changes have occurred over a period of 5, 10 or 15 years or during the tenure of the last pastor?

What does the financial data say about the financial status of the congregation?

Are there recognizable financial trends in the church's annual income over a 5, 10 or 15 year period? What are these trends and their implications?

Are there shifts in the sources of income of the congregation over a 5, 10 or 15 year period? What are the shifts and their causes? What are their implications?

What does the information reveal about the community (neighborhoods) surrounding the church? What institutional changes have occurred in the community? What population changes have occurred? What factors have caused these changes? Are changes continuing to occur?

What segments of the community's population are represented in the membership of the congregation? Are these new representations? If so, how did these occur?

Do the existing church program activities still support the mission of the church?

Do they meet current church goals and objectives? Are the reasons they were initiated still relevant?

What pastoral leadership characteristics were helpful in achieving the church's mission goals in the past?

What pastoral leadership characteristics were not helpful in achieving the church's mission goals in the past?

Has the session and congregation dealt with both the positive and negative aspects of previous pastoral leadership?

Can you identify the top 5 pastoral leadership characteristics that will enhance the church's mission?

Team members should also review all fact templates and analysis summaries at this time.

Mission Study Team Process and Responsibilities

Envisioning Time

The envisioning process conceptualizes the future mission and program activities of the congregation after having analyzed information about its current status

The product of the envisioning exercise is a Mission Statement for the congregation. The Mission Statement will provide direction for the church's journey as a proclaiming, witnessing, and serving Christian congregation over a 5 to 10 year period, or during the tenure of the next pastor.

The information on existing church activities is helpful when the Mission Study Team puts "arms and legs" (measurable objectives) to the mission statement. The Mission Statement is a major part of the Mission Study Report.

Earlier the Mission Study Team reviewed Chapters I to V, of the Book of Order. This information should be used as a foundation for allowing God to work through you in developing the church's mission. It is recommended that the Mission Study Team review and reflect on the following foundational materials prior to beginning the envisioning exercise.

Chapter I – Preliminary Principles

1. The Head of the Church
2. The Great Ends of the Church

Chapter III – The Church and Its Mission.

The task of the Mission Study Team is to compose a Mission Statement that will provide direction for the church's journey as a proclaiming, witnessing, and serving Christian congregation over a 5 to 10 year period, or during the tenure of the next pastor. This Mission Statement is dynamic, not static or fixed, and provides direction for the church's mission and reason for existence.

The envisioning process and Mission Statement can be approached by any method the team feels would work. Here is a suggested process:

Identify 3 members of the team that feel called to compose a proposed Mission Statement for the church.

Once they have the proposed Mission Statement, it is shared with the Mission Study Team for modification until there is consensus on the Mission Statement.

Target Population

The Team then identifies the target population who the church is best equipped to reach, attract and minister to within the community. Developing an understanding of your target:

Offers guidance to the Session and leadership on where energy and resources should be concentrated.

Provides clarity and direction as the congregation sets goals and objectives for the future.

Mission Study Team Process and Responsibilities

For example, if your target group is a growing retirement community in your area, what does that mean for worship, communication, pastoral skills needed, etc? The same questions would be relevant if your congregation hopes to attract young families, racial ethnic communities, etc.

Goals & Objectives

Goals and objectives, like the Mission Statement, are meant to be guides for your congregation's journey, not legalistic and binding rules.

Having developed a mission statement for your congregation, the next step is to develop measurable and achievable goals and objectives in order to live out your mission statement. This is one of the most important and difficult aspects of developing your mission study report because it requires the congregation to enter the proverbial "where the rubber hits the road" conversation. While maintaining focus, make room for the Holy Spirit and be aware when adjustments are needed.

Goals and objectives are important because they:

- Enable the Mission Study Team and Session to interpret to the congregation and future leadership the vision, focus and future direction of the congregation;
- Enable the Session and congregation to structure and utilize financial and people resources in effective ways;
- Give direction to the Pastor Nominated Committee in calling leadership that has gifts that give your congregation the best chance of achieving the set goals and objectives;
- Provide a natural and effective tool for evaluating how the congregation is doing in fulfilling its mission statement.

The basic question that needs to be addressed is "How will you do it?" When developing the goals, be as specific as is helpful without being over-proscriptive or too vague. Again, goals and objectives are guides for helping your church focus on the future and accomplish your mission.

Some helpful definitions:

Goal: A measurable result that aligns with the Mission Statement and Vision

Objective: One or more action steps that show how the goal will be achieved

See Appendix M for sample

Mission Study Team Process and Responsibilities

One Final Question for Reflection

Having completed the envisioning process, what is the status and the condition of the congregation?

How healthy is the congregation in relation to the questions posed below?

Does the congregation have a strong sense of identity? What is that identity?

Is the congregation growing in membership?

Does the congregation support the overall mission of the church, locally, and the church-at-large (General Mission)? Does this support amount to a tithe or more of its mission income?

Is the congregation engaged in mission partnerships with other congregations and ministries?

How does the congregation review and improve the quality of Christian education and the spiritual nurture of its members (children, youth and adults)?

How is divine worship a growth experience for members and for the congregation as a whole?

Does the congregation include people from various economic levels and age groups in its membership? In what ways is the congregation inclusive or striving to be so in its membership?

What is the church's intentional plan for outreach and service to the community?

How is the congregation's mission a reflection of the identity of the congregation?

Mission Study Teams are encouraged to use the Mission Study Checklist, the Congregational Health Questions and the Great Ends of the Church categories to guide their work. The Presbytery will review the Mission Study Report with all of these guidelines in mind.

Writing the Mission Study

Important to keep in mind as you write this report...

The task of writing the narrative report can be accomplished by one person or by a team of two to three people with assigned sections. However, since there were many work assignments, and the committee is organized and divided into identifiable sections, the report could be written in a similar fashion. This distribution of responsibility will promote committee ownership of the report and help members become fully familiar with at least one major segment of the document. If you choose to write the report with a variety of writers please keep in mind issues such as flow, readability, clarity of the process, etc. Because Healthy Congregation reads many Mission Studies and we want to be faithful to the work you have done, it is vital that the report be easily read and clearly laid out. Discuss how the committee would like the report to appear to the Session. What format would be most helpful to the Pastor Nominating Committee, as the information contained in the Mission Study Report will be used to complete the Church Information Form?

Mission Study Team Process and Responsibilities

A simple report outline could suffice, as long as it adequately provides the information gathered and analyzed; presents the mission statement with clarity; contains measurable mission goals and objectives to be undertaken by the congregation in 5 to 10 years in light of the mission statement; and includes a current church budget of income and expenditures, as well as a preliminary budget of income and expenditures for the upcoming year.

Use the Checklist in Appendix A to be sure all of the objective information is included. Make sure that most if not all of the questions posed in this guide have been dealt with. We are not looking for “right or “wrong” answers so even if you have not come to any conclusions around certain issues, include your reflections. Remember: the struggle and the process are the important parts of the Mission Study Process.

Keep it simple and clear: While creativity is encouraged, be sure the report is accessible and well written. Make no assumptions about what readers may or may not know about your congregation. If there is history that is important please include it. Honest information about what may influence your past, current or future congregation development is vital to an effective review of the Mission Study. Make no assumptions about what readers may or may not know about your mission study process. While there is some uniformity in what we hope you *DO*, the culture of your congregation will determine *HOW* you go through the process.

The bodies of Presbytery that may need to review this study are made up of Elders and Clergy from throughout the presbytery. For this reason, these bodies may only meet once a month. Be sure to know when meetings are held so you can submit the reports with enough time for them to be reviewed. Generally reports submitted the day of the meetings will not be reviewed.

Many reports are not approved on the first submission to the Presbytery. This is not a negative reflection on the Mission Study Team, but rather an intentionality to take your work seriously and to join you in the discernment of the future of the congregation.

To be used by the Mission Study Team and the Presbytery Healthy Congregation Liaison to assure all components are in the Mission Study Report

The intent of this checklist is to ensure certain components are included. It is not done in the search for “the” correct answers; rather it is included in the hopes that the process will yield new discoveries.

The following major components should be included in the mission study

- Yes ___ No ___ an analysis of membership of the congregation over a 5 to 10 year period was completed.
- Yes ___ No ___ an analysis of financial resources of the congregation over a 5 to 10 year period was completed.
- Yes ___ No ___ an analysis of community demographics over a 5 to 10 year period was completed.
- Yes ___ No ___ an analysis of pastoral leadership over a 5 to 10 year period was completed.
- Yes ___ No ___ an inventory of programs for the church and/or the community was completed.
- Yes ___ No ___ a long-range financial plan to support the goals and objectives of the mission study was developed.
- Yes ___ No ___ a stewardship program was developed.

Mission Statement – Goals and Objectives

- Yes ___ No ___ is there a clear mission statement?
- Yes ___ No ___ does the mission statement contain clearly stated mission goals with measurable objectives in a 1-3 year time frame?
- Yes ___ No ___ does the mission statement contain clearly stated mission goals with measurable objectives in a 3-5 year time frame?
- Yes ___ No ___ does the mission statement contain clearly stated mission goals with measurable objectives in a 5-7 year time frame?

Comments _____

Recommendations:

- _____ Approve the Mission Study and inform the Committee on Ministry and Pensions
- _____ The Mission Study is not complete.
- _____ The following parts are missing: _____
- Yes ___ No ___ The church has been asked to complete the work.
- _____ Date of completion: _____
- _____ Persons doing the Mission Study Review: _____

Purpose Statement

- For an entity such as a Presbyterian church, a purpose statement answers the question:
What is God calling us to do?
- Note that making a purpose says implies belief in a Creator and plan
- Ideally, a purpose statement is short and catchy. It should build morale, reduce frustration, allow concentration, attract cooperation, and assist evaluation. This requires ongoing communication and clarification to everyone in the congregation.
- Ideally, a purpose statement concisely reflects the core of the more descriptive items below. It is sometimes drawn from key components of the Mission Statement.

Mission Statement

- A type of statement common to many Presbyterian churches.
- A mission statement generally consists of a brief proclamation of identity, a purpose statement (such as described above), and maybe an overview of our approach
Who are we?
What is God calling us to do?
What is our approach to achieve our purpose?
- Ideally, a mission statement builds morale, reduces frustration, allows concentration, attracts cooperation, assists evaluation, and provides a reminder of identity. This requires ongoing communication and clarification to everyone in the congregation.

Statement of Faith

- A detailed explanation of our theological beliefs and possibly our faith journey
What do we believe?

Vision (Qualitative)

- A description of a target future state, in qualitative terms:
What do we hope to become?

Vision (Quantitative)

- A description of a target future state, specifically defined in measurable terms:
In measurable terms, exactly where are we going, and by when?

Strategic Plan

- A description of how we plan to achieve the vision
How will we achieve our vision?
- A strategic plan should include a description of organizational structures, including staffing allocations (i.e., org chart) and ministry area responsibilities.
- When describing a path toward a quantitative vision, a strategic plan should include measurable, intermediate milestones over time. It should also include a financial plan with detailed budgets.

Mission Study

- A type of strategic document common to Presbyterian churches.
- Ideally consists of a Mission Statement, Statement of Faith, a qualitative and quantitative Vision, and the major components of a Strategic Plan, including a description of the current state of the congregation and a description of the surrounding or target community. Ideally also includes a short purpose statement.
- In SF Presbytery, an approved mission study must be in place in order to undertake a pastor search. This is to help ensure the subsequent pastoral care is appropriate – i.e., that the congregation and any new pastor are aligned in their expectations and plans.
- Beyond their role in the pastoral search process, many mission studies are largely ignored, because either the congregation does not operate strategically and/or because few outside the Mission Study Committee ever fully buy into the Mission Study plan. To avoid this problem, it is important to include the congregation, staff, and Session involved in the Mission Study process, i.e. keep them informed and collect their feedback along the way.

The Presbytery encourages healthy congregations. The health and vitality of the Presbytery is directly related to the health of its congregations. In this respect, the following questions are meant to stimulate reflection by the Mission Study team about the congregation's health and identity.

1. Does the congregation have a strong sense of identity? What is that identity?
2. Is the congregation growing in membership?
3. Does the congregation support the overall mission of the church, locally, and the church-at-large (General Mission)? Does this support amount to a tithe or more of its mission income?
4. Is the congregation engaged in mission partnerships with other congregations and ministries?
5. How does the congregation review and improve the quality of Christian education and the spiritual nurture of its members (children, youth and adults)?
6. How is divine worship a growth experience for members and for the congregation as a whole?
7. Does the congregation include people from various economic levels and age groups in its membership? In what ways is the congregation inclusive or striving to be so in its membership?
8. What is the church's intentional plan for outreach and service to the community?
9. How is the congregation's mission a reflection of the identity of the congregation?

An example of a mission study may be obtained from the Presbytery office. However, we recommend that you make every effort to wrestle with the content and form of your own statement—no two congregations are alike, and reading another church’s efforts may actually inhibit your ability to express your own unique qualities.

This timeline is by no means prescriptive. As every congregation has a unique personality and culture, each Mission Study Process will be different. This timeline is only to be used only as a map or guide.

Book Of Order Readings:

Chapters I – V

Scripture Readings:

Matthew 13:1-43; 28:16-20; Mark 9:33-50; Luke 6:17-49; John 3:16-21; 15:1-27; Romans 12

These steps may take one or more meetings.

Step 1

Orientation with Healthy Congregations Liaison

Step 2

Organizing the Mission Study Team

Discussion of Book of Order Chapter I, Section 2 and New Testament Readings

The review of committee responsibilities and tasks

Scheduling of meetings of Mission Study Team

Scheduling of reporting to Session, Congregation, etc.

Step 3

Assignment of tasks to work groups and/or individuals

Identify resources needed for committee work

Scheduling deadlines for reports from the work groups/individuals

Step 4

Developing of reflection, gathering and envisioning processes

Engage in Mission Study Team Reflection Process**Step 5**

Reports of work groups/individuals

Analysis of Reflection Process and Outcomes

Revisit Gathering Process

Engage in Mission Study Team Gathering Process**Step 6**

Reports of work groups/individuals

Analysis of Gathering Process and Outcomes

Revisit Envisioning Process

Engage in Mission Study Team Envisioning Process

Step 7

Envisioning Exercise (this may take more than one meeting)

Review of report outline

Make writing assignments with realistic deadlines, including the assignment to write the mission statement

Step 8

Report of writers on assignments

Putting the report together

Reviewing the draft of the mission study report

Finalizing the report

Transmitting the report to the Session and then to Healthy Congregations

Break for Presbytery Process**Step 9**

Wrap-up Final meeting with Healthy Congregations Liaison

The suggested schedule of meetings can be expanded in any way that will facilitate the timely and thorough accomplishment of the tasks of the Mission Study Team. Scheduled meeting dates must be calculated on how long it will take members to realistically accomplish their assignments.

The more information and opportunities of involvement by the congregation will create ownership, and a congregation that will stand fast in working on the goals of the church. Below are suggestions on how you can involve the congregation.

These included (in 10 minutes or so)

- . Listing all the on-going activities of the church
- . Listing all the agencies/organizations that the congregation is in •mission with and/or supports financially
- . "Mapping" the neighborhood: draw a large, rough diagram of the neighborhood surrounding the church and ASK people to name and place on the map (this exercise can be found in *Studying Congregations* see Appendix K)
- . Favorite hangouts
- . Religious buildings
- . Other major institutions (education, health, government, arts, businesses etc.)
- . Landmarks

Sharing in table groups-of 6-8 (with recorders writing):

- . Strengths of the congregation
- . Things (programs, people) they are proud of
- . Areas they would like to see strengthened

These lists can be helpful summaries for the Mission Study team and give the congregation a sense of being a part of the process. It also gives the Mission Study the "pulse" of the congregation fairly quickly.

1. Fact Gathering Template

Current total number of members _____

Tenure by percentages _____

Number of inactive members
(attends worship less than 6/year) _____

Number active members
% of active members that are women _____

% of active members that are men _____

Racial/cultural composition _____

Residential location of members by distances to church.
Please group by percentages that live within 0-5 mile distance; 6-10 miles, etc. _____

2. Analysis Instructions

Now that you have gathered the necessary facts for this section, please review them and keep in mind that your next step will be to write a summary of the facts.

3. Summary report of facts

Using your facts write a summary that includes:

- Highlighting major memberships changes (+ or -) over a 5 to 10 year period or during the tenure of the last pastor

4. Value of this information

This will be valuable information used in the envisioning process in determining:

- Possible target communities for outreach
- Relevant goals and objectives

Inventory of Church/Community Program Activities

1. Fact Gathering Template

Identify list all activities and programs of the church over the past 10 year period.
 Identify and document the original purpose for creating each activity or program.

Example:

Activity/program	Purpose	Number years in existence
Family Fellowship Unit Fellowship/support for evangelism to families.	Strengthen the Christian family	6
Thanksgiving Dinner	Cross-generational fellowship donations given to a homeless shelter	15

2. Analysis Instructions

Now that you have gathered the necessary facts for this section, please review them and keep in mind that your next step will be to write a summary of the facts.

3. Summary Report of Facts

Using your facts write a summary that includes:

- . What is the connection of each activity or program to the church?
- . What is the current health of each program?
- . Any voids in the ministry of the church’s activities or programs (e.g. No college age study or fellowship, when the church has 5 college age students)
- . Identifying any trends noted regarding activities or programs in the ministry of the church.

4. Value of This Information

This information will help you understand the history of the existing church program activities over the past 10 years. This information will then be used to determine whether or not, and how it currently fits into the overall ministry of your congregation. This background provides background information for the envisioning exercise.

1. Fact Gathering Template

Church's annual financial report for the past 10 years to the present _____

2. Analysis Instructions

Review financial reports, keeping in mind changes (+ or -) in the following areas:

- . Total resources and assets of the congregation
- . Different sources of income % of total income
 - membership pledges
 - loose offerings
 - special gifts by members
 - building fund contributions
 - endowment income
 - investment income
 - facilities use fee
 - rental fees
 - other (s)
- . The church's annual stewardship program
- . The church's long range stewardship program (if it exists)

3. Summary Report Of Facts

Using financial data gathered, please summarize the church's financial picture over the past 5 – 10 year period, or during tenure of service of the last pastor. Be sure to highlight in our summary major financial shifts (+ or -).

4. Value of This Information

This will be valuable information used in the envisioning process in determining:

- . Financial trends for the church
- . Funds necessary to achieve work of the church with the new mission statement, goals and objectives
- . Stewardship Program

1. Fact Gathering Template

A. Church Demographics

	Number	Percentage of Total
Female	_____	_____
Male	_____	_____
Age of Congregants		
Under 20	_____	_____
21-30	_____	_____
31-40	_____	_____
41-50	_____	_____
51-60	_____	_____
61-70	_____	_____
71-80	_____	_____
81-90	_____	_____
90 +	_____	_____

Racial/Ethnic Composition of Church

	Black	Hispanic	Asian	White	(create)
Congregation					
Session					
Deacons					

B. Community Demographics

Choose similar categories as above and research in a 3-5 miles radius of our church

2. Analysis Instructions

How is our congregation similar to the surrounding community? How are we different? How would we need to change to look more like our community?

3. Summary Report of Facts - Review church and community demographic facts keeping mind:

- . WHO OR WHAT? is in the immediate community where the church is located?
- . What does the information reveal about the community (neighborhoods) surrounding the church?
- . What institutional changes have occurred in the community?
- . What population changes have occurred?
- . What factors have caused these changes?
- . Are changes continuing to occur?
- . What is represented in current congregation membership?
- . What was the pastor (s) role in implementing the mission of the congregation over the last 5 – 10 years?
- . Describe the pastoral leadership the congregation has experienced over the last 5 – 10 years.

- . Describe how pastoral leadership has influenced the mission of the congregation over the last 5 – 10 years.
- . Describe the kind of pastoral leadership that is now needed to further the mission of the congregation.

Summarize this information

4. Value of This Information

Using demographic and keeping in mind areas in number 3, please summarize the church's demographics and pastoral leadership over the past 5 – 10 year period, or during tenure of service of the last pastor.

Resource	<p>“The Life Cycle of a Congregation” Martin F. Saarinen</p>
Description	<p>This brief document published by The Alban Institute provides a method by which congregations, Sessions and/or small leadership groups can begin to assess the health of their organization. By considering four basic factors of congregational development (spiritual energy, programs, administration and inclusion) this assessment tool helps leaders think about their church in terms of an organizational life cycle, identifies strengths and weaknesses of each stage and gives intervention suggestions.</p>
<p>Mission Study Use <i>(This is a suggested use. Many of the resources and tools listed can be used at a variety of times during the study process.)</i></p>	<p>Using this tool during a Mission Study process might allow the Mission Study Team to set goals and objectives appropriate to the congregation’s development as they craft the Mission Statement that will guide the congregation for the next 5-10 years.</p>
Approximate Time	<p>For a medium size group (12-24) to complete this exercise and have discussion time, plan on approximately 1 and ½ hours.</p>
Where to find this Resource	<p>The assessment tool is available for download at www.alban.org for \$7.00. Use the search function and search by title, author or product number - No. OL124 (Downloadable Product)</p>
Where to get more help	<p>Presbytery Staff are available to lead and facilitate meetings and workshops. Please call the Presbytery office at 510-849-4393</p>
What the Publisher says	<p><i>Learn your congregation's stage of life and how it can affect issues of administration, program, energy, and inclusion. Saarinen, in this Alban best seller, provides a powerful method for understanding church dynamics and the "pitfalls and possibilities" of current and future stages of congregational life. (www.alban.org)</i></p>

Resource	<i>Studying Congregations: A New Handbook</i> Nancy T. Ammerman, Jackson W. Carroll, Carl S. Dudley, and William Mc Kinney
Description	<i>Studying Congregations</i> is a hands-on guide that provides practical suggestions for gathering and analyzing data about your congregation. This edition (1998) is particularly helpful in providing a big picture approach to looking at your congregation as a system in a particular context. (see Chapter 2 “Ecology: Seeing the Congregation in Context” by Nancy Eiesland and R. Stephen Warner) Chapter 7 “Methods for Congregational Study” by Scott L. Thumma provides an overview of 7 methods of gathering data about your congregation and includes strengths and weakness of each method and provides suggestions for avoiding common pitfalls.
Mission Study Use <i>(This is a suggested use. Many of the resources and tools listed can be used at a variety of times during the study process.)</i>	This resource provides useful suggestions to help a Mission Study Team begin the process of congregational reflection and gathering information. Concrete explanations of the processes and templates of congregational surveys and other tools are available in the appendices. Both chapter 2 and 7 contain examples of a <i>Time Line</i> exercise. This exercise is easy to implement, can involved 10 people or a whole congregation and often provides insightful information about a congregations’ history.
Approximate Time	This resource requires initial reading time.
Where to find this Resource	Widely available online ISBN: 0687006511 Can be purchased new or used at Amazon.com for about \$17.
Where to get more help	Presbytery Staff are available to lead and facilitate meetings and workshops. Please call the Presbytery office at 510-849-4393
What the Publisher says	<i>This new edition of Handbook for Congregational Studies replaces the previous edition. In this new edition, the authors update what has become the primary textbook in the field of congregational studies in the seminary classroom. Studying Congregations: a New Handbook will also be a useful reference for pastors, denominational leaders, and strategic planning committees. Includes Appendix A Parish Profile Inventory and Appendix B Standard Demographic and Religious Involvement Variables. (www.abingdonpress.com)</i>

Resource	<i>Congregations in Transition: A Guide for Analyzing, Assessing, and Adapting in Changing Communities</i> Carl S. Dudley and Nancy T. Ammerman
Description	<i>Congregations in Transition</i> offers many of the same techniques and methods that <i>Studying Congregations</i> includes. However, this more recent publication (2002), has been refined based on real congregations, who are in the midst of change, using the tools and providing feedback. The chapters in the guide are more interrelated making it difficult to pick and choose sections to use. Congregations looking for a comprehensive system of study will likely find <i>Congregations in Transition</i> a helpful guide.
Mission Study Use <i>(This is a suggested use. Many of the resources and tools listed can be used at a variety of times during the study process.)</i>	Mission Study Teams might use this resource as a guide to the beginning stages of the Mission Study process – to gather and analyze data and to understand the history and current culture of their congregation. Numerous exercises provide ample opportunity for the whole congregation to participate in reflection and sharing.
Approximate Time	This resource requires initial reading time.
Where to find this Resource	Widely available online ISBN: 0-7879-5422-5 (Amazon, Powells, Barnes and Noble).
Where to get more help	Presbytery Staff are available to lead and facilitate meetings and workshops. Please call the Presbytery office at 510-849-4393
What the Publisher says	<i>This hands-on guide helps congregations meet the reality and challenges of today's constantly changing urban and suburban church communities. Congregations in Transition, written in an easy-to-follow workbook format, is designed to help communities of faith focus on the changing needs of their members and explore the opportunities and options open to them.</i> (www.josseybass.com)

Resource	Congregational Mission Studies Notebook
Description	This guide to studying congregations is a step-by-step system developed to help congregations engage in effective self study. Divided into sessions, each session contains a suggested agenda, exercises, prayers, questions for discussion and work to do before the next session. Because this guide was first published in the mid-1980s adjustments may be needed to take into consideration new technology.
Mission Study Use <i>(This is a suggested use. Many of the resources and tools listed can be used at a variety of times during the study process.)</i>	While this guide is set up to be used in sequence, each session contains exercises, discussion questions and planning tools that could be used individually. The step-by-step instructions and thorough attention to each area of study may be helpful for Mission Study Teams having difficulty getting started.
Approximate Time	Most individual sessions are designed to be 1 – 2 hours in length.
Where to find this Resource	This item is available online at www.pcusa.org Click on <i>Resources and Publications</i> , then <i>The Presbyterian Market Place</i> . Search by category under Congregational Development (\$14.00 Item # 7238096002) or call 800-524-2612
Where to get more help	Presbytery Staff are available to lead and facilitate meetings and workshops. Please call the Presbytery office at 510-849-4393
What the Publisher says	<i>This resource is a tool to assist congregations in the task of intentional self-stud. (www.pcusa.org – Presbyterian Distribution Service)</i>

21 Bridges to the 21st Century: The Future of Pastoral Ministry by Lyle C. Schaller

An 8-Track Church in a CD World: The Postmodern Church in the Postmodern World by Robert N. Nash, Jr.

Biblical Perspectives on Evangelism by Walter Brueggeman

Building A Contagious Church: Revolutionizing the Way We View and Do Evangelism by Mark Mittleberg

Church Marketing: Breaking Ground for the Harvest by George Barna

Congregations: Stories and Structures by James Hopewell

Contemporary Worship for the 21st Century: Worship or Evangelism by Daniel T. Benedict and Craig Kennet Miller

Discerning Your Congregation's Future : A Strategic and Spiritual Approach by Roy M. Oswald, et al (Paperback - September 1996)

Feeding the Flock: Restaurants and Churches You'd Stand in Line For by Russell Chandler

Growing Spiritual Redwoods by William M. Easum and Thomas Bandy

Incorporating New Members: Bonds of Believing, Belonging & Becoming by W. James Cowell

Inside the Soul of a New Generation: Insights and Strategies for Reaching Busters by Tim Celek & Dieter Zander

Leading Congregational Change: A Practical Guide for the Transformational Journey by Jim Herrington, Mike Bonem and James H. Furr

Holy Conversations by Gil Rendel and Alice Mann

More Than Numbers: The Ways Churches Grow by Loren Mead

Purpose Driven Church: Growth Without Compromising Your Message by Rick Warren

Sacred Cows Make Gourmet Hamburgers by William M. Easum and Thomas Bandy

Searching for Seekers: Ministry with a New Generation of the Unchurched by Mary Scifres

Spiritual Marketplace: Baby Boomers and the Remaking of the American Religion by Wade Clark Roof

Team Spirituality: A Guide for Staff and Church by William J. Carter

The Once and Future Church: Reinventing the Congregation for a New Mission Frontier by Loren Mead

Transforming Church Boards Into Communities of Spiritual; Leaders by Charles Olsen

Evaluation of the Mission Study Handbook/Process

Church _____ Date _____

In what ways is this Mission Study Guide helpful?

In what ways is this Mission Study Guide not helpful?

In what ways was the Healthy Congregations Committee helpful?

In what ways was the Healthy Congregations Committee not helpful?

Are there new exercises or ideas you would like to pass on to churches who will be going through this process in the future? (Please attach additional pages if necessary)

Please return to:

Mission Study Sub Committee – Healthy Congregations
San Francisco Presbytery
2024 Durant Ave
Berkeley CA 94707