**STANDARDS OF ETHICAL CONDUCT**

**General Assembly Presbyterian Church (U.S.A.)**

**LIFE TOGETHER IN THE COMMUNITY OF FAITH: STANDARDS OF ETHICAL CONDUCT FOR MEMBERS OF THE PRESBYTERIAN CHURCH (U.S.A.)**

### As a member of the Presbyterian Church (U.S.A.), in obedience to Jesus Christ, I accept Christ’s call to be involved responsibly in the ministry of the church, confirm that Jesus Christ is the pattern for my life and ministry and, relying on God’s grace, commit myself to the following standards of ethical conduct.

**I**

**I will conduct my life in a manner that is faithful to the gospel and consistent with my membership in the Presbyterian Church (U.S.A.). Therefore, I will:**

1. Practice the disciplines of study, prayer, reflection, worship, stewardship, and service.
2. Be honest and truthful in my relationships with others.
3. Be faithful, keeping the covenants I make and honoring marriage vows.
4. Treat all persons with equal respect and concern as beloved children of God.
5. Maintain a healthy balance among the responsibilities of my life’s work and church membership, my commitments to family and other primary relationships, and my need for spiritual, physical, emotional, and intellectual renewal.
6. Refrain from abusive, addictive, or exploitative behavior and seek help to overcome such behavior if it occurs.
7. Refrain from gossip and abusive speech; and
8. Maintain an attitude of repentance, humility, and forgiveness, responsive to God’s reconciling will.

II

**I will conduct myself within the Presbyterian Church (U.S.A.) so that nothing need be hidden from sisters and brothers in Christ. Therefore, I will:**

1. Bear witness to the gospel of Jesus Christ with courage, speaking the truth in love.
2. Honor the sacred trust of relationships within the covenant community and observe appropriate boundaries.
3. Be judicious in the exercise of the power and privileges of positions of responsibility I hold.
4. Avoid conflicts of interest that might compromise my witness and relationships within the community of faith.
5. Refrain from exploiting relationships within the community of faith for personal gain or gratification, including sexual harassment and misconduct as defined by Presbyterian Church (U.S.A.) policy.
6. Respect the privacy of individuals and not divulge information obtained in confidence without express permission unless an individual is a danger to self or others.
7. Recognize the limits of my own gifts and training and refer persons and tasks to others as appropriate.
8. Claim only those qualifications actually attained, give appropriate credit to others where due and observe copyrights.
9. Be a faithful steward of and fully account for funds and property entrusted to me; and
10. Accept the discipline of the church.

**III**

**I will participate as a partner with others in the ministry and mission of the Church universal. Therefore, I will:**

1. Participate in the mission and governance of the Presbyterian Church (U.S.A.) and work for the unity of the holy catholic church.
2. Show respect and provide encouragement for sisters and brothers in Christ.
3. Recruit church members responsibly, respect existing congregational relationships and refrain from exploiting persons in vulnerable situations; and
4. Cooperate with those working in the world for justice, compassion, and peace, including partners in ministry of other faith traditions.

# **SEPARATION ETHICS FOR PASTORAL LEADERS**

# Ministers of the Word and Sacrament/Teaching Elders

### “When Pastoral Leadership and Congregations say Goodbye”

Presbytery of Minnesota Valleys

*Approved by the Commission on Leadership, November 17, 2016*

Few circumstances in their professional lives challenge those in pastoral leadership to exercise more wisdom and judgment than the ones raised when leaving a congregation. In addition to making a professional move, they and possibly their family may be leaving supportive friends and community. When the transition involves the medical disability or retirement of a Minister of the Word and Sacrament/Teaching Elder who elects to remain in the community, and perhaps even in the community of the church, the issues become even more complex and challenging.

The Book of Order offers brief, but important guidance in the matter of transitions: **(G-2.0905***) “After the dissolution of the pastoral relationship, former pastors and associate pastors shall not provide their pastoral services to members of their former congregations without the invitation of the moderator of session.”* These guidelines refer to any former ministerial relationship with a congregation as defined in *The Book of Order G-2.0504.*

While such transitions involve several entities (i.e., sessions, congregations, church members, etc.), the Commission on Leadership (COL) believes that the burden of responsibility for creating a healthy transition lies primarily with the professional behavior of the pastoral leadership who is leaving. They must view the process of separation and transition as a final and critical part of their ministry to the congregation they have served; to not do so undermines the future health of the church and is a violation of professional ethics. The use of the term, “ethics” implies certain values which are important to consider during this often highly charged experience of the dissolution of the pastoral relationship. Such values include: \*effective leadership; \*congregational health and stability; \*the growth of pastor and members in dealing with pain, the problems, and the possibilities of separation; and \*the ability of the session and congregation to move positively and effectively toward the next phase of their lives. (Previous two sentences courtesy of Winnebago Presbytery)

Practically, the departing pastoral leader must work to educate the session and congregation on the Presbyterian understanding of the transition. She/he ought to take great care in expressing his/her support of the process and the role that presbytery plays in it.

Emotionally and spiritually, the departing pastoral leader can play a positive role in the welcome that future temporary, transitional, or installed leadership will receive. Explaining the transition process and the reasons for it will also assist in clarifying for all, the importance of following and maintaining proper boundaries.

Specific guidelines, based on the *Book of Order,* and developed through the experience of COL are found in the attached PASTORAL DISSOLUTION AGREEMENT and COVENANT OF CLOSURE. Representatives of COL will carefully review that document with each Minister of the Word and Sacrament/Teaching Elder who is leaving/retiring from a congregation in the Presbytery of Minnesota Valleys. The information will also be reviewed with the Session of the congregation affected by the move (prior to the election of a PNC) as a part of the transition meeting conducted by representatives of COL.

The PASTORAL DISSOLUTION AGREEMENT and COVENANT OF CLOSURE shall be signed by:

* Outgoing pastoral leader
* Spouse (if applicable)
* Clerk of Session of the congregation
* Representative/s of COL.

When completed, the original copy shall be filed in the leader’s file in the Presbytery Office and a copy placed in the Church’s file in the Presbytery Office as well as copies sent to the departing leader and the clerk of session of the congregation.

PASTORAL LEADER’S DISSOLUTION AGREEMENT and

COVENANT OF CLOSURE

Presbytery of Minnesota Valleys

Commission on Leadership

Following the dissolution of a pastoral leader’s relationship, it is important for the departing pastoral leader and the congregation to understand that all previous pastoral functions must cease. These functions include, but are not limited to: home, hospital, and nursing home visitation; personal counseling (including grief issues); and all liturgical functions such as preaching, weddings, baptisms and funerals. As per G-2.0905, former pastoral leadership shall not provide services to and with members of their former congregation without the invitation of the moderator of session. *This Dissolution Agreement shall consider fairness to all parties involved, length of pastoral tenure and expedience of needed dissolution.*

Dissolution Agreement between\_\_\_\_\_\_\_\_\_\_\_Presbyterian Church of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

and (pastoral leader) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Length of relationship: \_\_\_\_\_\_\_\_

\_\_\_Dissolution initiated by Pastoral Leadership

\_\_\_Dissolution initiated by Congregation/Session

\_\_\_Dissolution initiated by Presbytery of Minnesota Valleys

Dissolution Date (by which all pastoral functions are concluded): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last Day in the Pulpit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Last Day in the Church Building: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last Day in the Manse (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Note specifics if any rent and/or utilities are required from the exiting leadership if the manse is

not vacated by this date:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Salary (including Housing Allowance) to be paid through (date): \_\_\_\_\_\_\_\_\_\_\_\_\_ and/or any

Termination Bonus Pay for pastoral leadership: $\_\_\_\_\_\_\_\_\_\_\_\_\_. Note final payment date for these payments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_. (All salaries paid and/or Termination Pay are part of Effective Salary and therefore shall be accompanied by Board of Pension dues for retirement and medical or other retirement payments.)

Pastoral Leader \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and his/her spouse (if applicable), the

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Church of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and the Commission on Leadership of the Presbytery of Minnesota Valleys, having discussed the intent and requirements of the following Presbytery policies regarding pastoral dissolution, agree to the following covenant.

Please note: There are no time limits to these responsibilities. They do not expire after a certain period of time has passed. It is understood that this policy does not affect or require termination of friendships with individuals in the congregation, but these friendships must be carefully continued in the spirit of the following agreement.

# Agreement- Departing Pastoral Leader

As of effective Dissolution Date, I understand and agree:

* When Presbytery dissolves the pastoral leader’s relationship, all pastoral functions must cease.
* For the health of the congregation and its potential relationship with future pastoral leadership, it is necessary that the departing pastoral leader find a different congregation with which to worship. For the same reasons, if the spouse happens to be employed by the church as well, this relationship should terminate as of the effective Dissolution Date.

*Possible exception: Special services of worship such as funerals, weddings, etc. as a*

*congregant and not as one actively participating in the leadership of the service.*

* Adult children of the former pastoral leader, who wish to continue membership in or worshipping with the congregation previously served by their parent/s, should consult with the new pastoral leadership and the Session as to the propriety of such a decision and abide by their advice.
* It is inappropriate to involve myself in any leadership or advisory role (public or private) in the congregation. This includes but is not limited to: \*commenting on potential persons for leadership; \* intervening, supporting or giving advice to anyone involved in a congregational disagreement or dispute; \* giving opinions or directions regarding church business that could undermine the transitions necessary for the church and the development of the relationship between the congregation and new pastoral leadership.
* It is inappropriate to officiate in any special event in the lives of former parishioners or of the congregation, including, but not limited to, weddings, funerals, baptisms, worship leadership, church anniversary activities, etc. unless expressly invited by the Moderator of the Session.
* Any request for pastoral services by a member of the congregation shall be declined and the member be referred to the current pastoral leadership. At no time, shall the former leader give any indication to the request that he/she would be glad to officiate if only the current leader would invite her/him. Such action is contrary to the spirit of this covenant.
* I will assure that all financial obligations within the community are completed so that the church will not be responsible to bear any burdens on my behalf.
* I will leave the church study and the manse, if applicable, in a clean and orderly fashion with all church belongings intact, returning all keys and removing all personal possessions no later than the date agreed upon. Any out of the ordinary repairs or cleaning shall be the responsibility of the departing person.
* I will authorize and notify the Board of Pensions, using “Service Change” Form ENR-110 or Board of Pension “Service Termination for Traditional Program Members: Form ENR-303, or any other updated change forms.

NOTE: Concerns or complaints regarding any of these issues shall be directed to the COL for resolution. If resolution is not reached, the matter shall be forwarded to the Stated Clerk of Presbytery. The Stated Clerk shall invite two or more members of COL to meet with the person alleged to have been in violation. Should they find the complaints valid, and should the practice continue, the matter may be brought before the entire COL and subject to censure according to the “Rules of Discipline.”

# Agreement of the Session

On behalf of the congregation, the session shall serve as a guide by:

* Assuring the members of the congregation respect the terms of the Covenant as outlined.
* Interpreting the terms of the Covenant of Closure to the congregation. They shall clarify and help members understand the scope of the change in relationship that occurs when their Minister of the Word and Sacrament or Commissioned Pastor (also known as Commissioned Ruling Elder) is no longer in place. This may be particularly true when former leadership is elected to an Emeritus role. A person in that role is not exempted in any way from the terms of this Covenant.
* Instructing the congregation to not involve itself in the continuing ministry of the departed pastor.
* Assuring that any written and signed agreement is incorporated in the Session Minutes.
* Authorizing and notifying the appropriate entity to terminate benefit contributions paid out by the church as part of a former compensation and benefits package. If Board of Pensions (BOP), this will include “Service Change” Form ENR-110 or BOP “Service Termination for Traditional Program Members” Form ENR-301, or any other updated change forms. A copy will be made for the departing pastoral leader and we will be responsible for mailing or faxing completed forms to Board of Pensions.

# Agreement of the Presbytery Commission On Leadership

On behalf of the Presbytery, the Commission on Leadership shall:

* Meet with and interpret the Covenant of Closure and its purpose to the Minister of the Word and Sacrament or Commissioned Pastor (also known as Commissioned Ruling Elder) prior to their departure as well as with the Session of the particular church.
* Be the Presbytery’s agent in reminding all parties of the principles agreed to in the Covenant of Closure. In the event any continued failure to live up to these principles is reported, compliance with the principles of the Covenant shall be enforced, as necessary.
* Be ready to assist any pastoral leader or Session struggling to understand or to adapt to this change of relationship.
* Be responsible for assuring all necessary signatures are received and copies of the completed Pastoral Dissolution Agreement and Covenant of Closure are distributed as follows:
* Original copies in the appropriate pastoral leader’s file in the Presbytery Office
* A copy to the departing Pastoral Leader
* A copy to the Clerk of Session of the appropriate church
* A copy in the Church’s file in the Presbytery Office

SIGNATURES:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Departing Pastoral Leader

Minister of the Word and Sacrament or

Commissioned Pastor (also known as Commissioned Ruling Elder)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse (if applicable)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Clerk of Session

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Commission on Leadership Chair or Designee

# THE PASTORAL CALL

(For Pastor, Co-Pastor, Associate Pastor, Designated Pastor)

**The Presbytery of Minnesota Valleys, Presbyterian Church (USA)**

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Presbyterian Church of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

belonging to the Presbytery of Minnesota Valleys, being well satisfied with your qualification for ministry and confident that we have been led to you by the Holy Spirit as one whose service will be profitable to the spiritual interests of our church and fruitful for the Kingdom of our Lord, earnestly and solemnly calls you,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name)

to undertake the office of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in this congregation, beginning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, promising you in the discharge of your duty all proper support encouragement and allegiance in the Lord.

That you may be free to devote full-time (part-time) to the ministry of Word and Sacrament among us, we promise and obligate ourselves to pay you in regular monthly payments the following effective salary and following vouchered expenses (fill in those which are agreed to):

**Effective salary Reimbursable expenses (by voucher)**

Cash Salary $\_\_\_\_\_\_\_\_ Automobile expense (IRS rate) $\_\_\_\_\_\_\_\_

Fair rental value of manse $\_\_\_\_\_\_\_\_ Business/professional expenses $\_\_\_\_\_\_\_\_

Housing Allowance $\_\_\_\_\_\_\_\_ SECA Supplement (up to 50%) $\_\_\_\_\_\_\_\_

Utilities Allowance $\_\_\_\_\_\_\_\_ Continuing Education $\_\_\_\_\_\_\_\_

Deferred Compensation $\_\_\_\_\_\_\_\_ Other allowances $\_\_\_\_\_\_\_\_

Other allowances $\_\_\_\_\_\_\_\_

**Total** $\_\_\_\_\_\_\_\_ Moving Costs (up to) $\_\_\_\_\_\_\_\_

(as of 1/1/19 this is taxable income)

**Benefits**

Full medical, pension, disability, and death benefit coverage under the Board of Pensions

Paid Vacation of \_\_\_\_ weeks annually, including Sundays (4 Weeks Minimum)

Paid Continuing Education of \_\_\_\_ weeks annually (2 Weeks Minimum), cumulative for three years maximum.

Paid maternity leave of 6 Weeks. Paid paternity leave of 4 weeks.

We further promise and obligate ourselves to review with you annually the adequacy of this compensation.

In the seventh year of service, the congregation can provide for a three-month Clergy Renewal Leave/Sabbatical Leave, continuing the salary and benefits for that period, and providing for pulpit supply in the pastor's absence.

In testimony, whereof we have subscribed our names this \_\_\_\_\_day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Having moderated the congregational meeting which extended this call for ministerial services, I do certify that the call has been made in all respect according to the presbytery policy and the Form of Government, and that the persons who signed the foregoing call were authorized to do so by vote of the congregation.

Vote of the congregation at the meeting was \_\_\_\_\_\_\_ in favor of the candidate and \_\_\_\_\_\_\_opposed.

(Signed) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, moderator of the meeting

# Certification of Call

1. **Action by Presbytery of Call**
2. The Presbytery of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has reviewed and approved this call.

Date of action\_\_\_\_\_\_\_\_\_\_ (Signed) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stated Clerk or Authorized Signer

**B. Action by the Minister's/Candidate's Presbytery**

1. The Presbytery of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ finds it expedient (not expedient) to release \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to accept this call.

Date of action\_\_\_\_\_\_\_\_\_\_ (Signed) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stated Clerk or Authorized Signer

**C. Acceptance of the Call**

This is to certify that I have received and accepted the call.

Date of action\_\_\_\_\_\_\_\_\_\_ (Signed) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Minister

***Complete and sign three original copies. When all parties have signed, an original copy goes to***

***1) the minister, 2) the calling church, and 3) the presbytery of call***

### **Sample appointed moderator reporting form**

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Report #

Congregation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City

Moderator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone

1. The good news in this congregation is:

2. The challenges, as I see them, are:

3. Resources from the presbytery that might be helpful for this congregation are:

4. I feel COM needs to be aware of:

5. For congregations in an Interim/Transitional period: Are efforts being made to address transitional tasks?

Five Focus Point and Process Tasks:

|  |  |
| --- | --- |
| **Congregational Focus Points** | **Interim Minister Tasks** |
| Heritage | Joining the System |
| Mission | Analyzing the Organization |
| Leadership | Connecting with the denomination or larger church |
| Connections | Focusing and Assuming Responsibility |
| Future | Exiting and Evaluating |

*This report is to be submitted annually to Committee on Ministry through the presbytery office.*

**SAMPLE**

**MEMBERS-AT-LARGE OR VALIDATED MINISTERS REPORT**

*Annually members-at-large should report to the presbytery a detailed description of their ministry activity. Use the below form to complete your answers.*

Name:

Address:

City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_\_\_ Zip Code:

Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email:

1. Describe your employment during the past year (list all full-time or part-time positions held, whether secular or religious, including self-employment for which income was earned), or write “not employed.”
2. Your report on your activities of religious or ecclesiastical nature:

a. In what ways have you been active in the life and work of the presbytery?

(List specific responsibilities and how they have been filled.)

b. In what ways are you actively related to the life and work of a particular church (e.g., Parish Associate)?

1. In what ways can presbytery be helpful to you?

Signature:

Date Completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

THE FITNESS AND SUITABILITY INTERVIEW

Becoming a Member of The Presbytery

**Fitness and Suitability Interview Philosophy:**

This interview enables the Committee on Ministry (COM) to garner a sense of who our prospective pastoral leaders are and how they might conduct themselves once they are on the field. Although the Book of Order allows for the possibility, there is not a sense here that we are seeking to prohibit someone from entering the presbytery, only that we might be better prepared to anticipate and interact with individuals who serve in ministry.

Ideally, this interview will be conducted by a minimum of two persons, one of whom shall be a current member of the COM.

A potential new member of the presbytery, whether a candidate for ministry or an ordained Minister of the Word and Sacrament, should provide the COM with a copy of their Personal Information Form (PIF) prior to the interview. If it is not a part of the PIF, the prospective pastor should provide a copy of their Statement of Faith.

We recommend that during the interview the prospective pastor not be given a copy of the questions because one of the things which you are assessing is this person’s ability to think on their feet to converse with spontaneity. Committee members should each have a copy and use the sheet to make notes.

What we might be assessing in this interview are things like:

* Is this a lone ranger?
* Do we have someone here who will likely be an advocate for the presbytery or someone who will engender estrangement from the presbytery?
* Does this appear to be someone who knows it all and is authoritarian in attitude?
* Are we seeing someone who might serve the larger church in some specific area?
* Did anything come up in the interview which the Presbytery Nominating Committee ought to be made aware?
* Is this person’s theology and practice, Presbyterian?

Once the interview is completed, the prospective pastor should be excused; and the committee members should collaborate their impressions. One of the Fitness and Suitability interview members should collect notes and make a formal report which would be put in the committee’s file.

**Fitness and Suitability Interview Guidelines:**

1. Begin with prayer, introductions. Ask a few questions about the Candidate’s Statement of Faith, including their sharing something of their spiritual journey, and possibly something which is key or central to their theology.
2. Questions for the interview will vary depending on circumstances, but may include the following or similar questions:

* Tell us about your sense of call to ordained ministry.
* What draws you to this new congregation?
* What in your experience prepares you to serve this congregation well?
* What energizes you as you think about becoming the pastor of this congregation?
* What concerns you?
* What leads you to seek a new call at this point? (If the candidate is a Minister of the Word and Sacrament serving as a pastor)
* How do you anticipate serving in this presbytery?

1. Ask how they plan to approach their self-care: days off, what they see as appropriate works hours a week, how they approach their continuing education, their concept of Sabbath, etc.
2. “Can you answer all the ordination and installation questions with confidence and a clear conscience?” An alternative question: “Do you hold any scruples, or any points of departure, from the beliefs or requirements outlined in the church constitution for ordained officers?”
3. Talk about the culture and character of the presbytery (any packets of information to give?).
4. Invite the person being interviewed to ask any questions that they might have.

Financial Sustainability Assessment

Creating a Spirit of Generosity originates from a deep faith and trust in God as provider, sustainer, and redeemer. Jesus reminded the disciples that in life, we must choose our life treasures. Accordingly, we are told, “Where your treasure is, there your heart will be also” (Matthew 6:21). The Presbyterian Foundation states “Stewardship is the church’s theological antidote to the chief idols of our age, consumerism, materialism, and acquisition. Stewardship is about the joyous discipline of thanking God with the way we live our lives and spend and share our money.” As congregations discern their future, the following tools invite councils and members in a dialogue to review patterns of giving within their ministry context. Reviewing financial norms, current needs, and future goals in an open and honest dialogue establishes trust, accountability, and realistic goals for future ministry.

The following form should be used during the congregational mission study. It can also be used annually to review your congregational health. Data used to complete this form may be taken from your annual statistical report. Some questions are designed for further discussion and assessment with the

congregation. As a credo, “we believe” people we affirm the following *(from Presbyterian Foundation):*

*We trust in God alone who loves us and enriches us with abundant gifts.*

*And so we will seek to move . . .*

*In attitude from scarcity to abundance. In lifestyle from consumption to renewal. In finance from debt to freedom.*

*We worship God alone who empowers us to celebrate the grace of the Lord Jesus Christ.*

*And so we will seek to move . . .*

*In liturgy from avoidance to celebration. In giving from funding to offering.*

*In emphasis from annual to year-round.*

*We serve God alone Who calls us to a life of thanksgiving to the Spirit, loving God, neighbor, and self.*

*And so we will seek to move . . .*

*In practice from maintenance to mission. In outreach from parochial to global.*

*In relationships from domination to interdependence.*

Sustainability – Finances

## **Financial Stewardship**

1. Our current stewardship education consists of: (check all that apply)

Sharing a budget at the annual meeting.

Printing the offering amount in the bulletin each Sunday.

Including a bulletin appeal when funds are running short.

We have a regular stewardship talk, by a member, that focuses on practices of generosity as part of growing in faith

We do an Annual Financial Stewardship Campaign

We actively encourage and lift up the Biblical practice of tithing

Other, provide comments below:

Half (or more) of our annual congregational giving comes from the 65+ age group. Yes\_\_\_\_\_\_No

If our congregation's top one or two giving households died within the next year, there would be a

financial crisis within our congregation. Yes No

We know the giving capacity of our congregation, based on the average household income in the area

(that number is available from census reports). Yes No *(you can find that info at*

[*www.census.gov/quickfacts/*](http://www.census.gov/quickfacts/) *…enter your state, county, city, town, or zip code….in the “Select a Fact’ box, scroll down and look for the Income and Poverty section)*

We have a congregational/endowment/memorial fund. Yes No \_

If so, we have withdrawn $ from it, to pay regular ministry expenses within the past 12

months. Yes No

## We receive financial gifts: (check all that apply)

Through passing around plates/baskets in worship

By providing and promoting online giving, giving at kiosks, etc.

Pledges for special projects (i.e., capital improvements, mission projects, etc.)

Fundraisers

Grants

Crowdfunding (the practice of funding mission through many small gifts from a large number of funders)

By providing and promoting gifts through estate planning, trusts, stock gifts, etc.

How much mission support do we provide through Per Capita and Mission Giving? (*Mission support is an investment in our present and future to provide resourcing, training, scholarships, educational debt assistance, administration, and small congregational support, etc.).*

Don’t provide any

Less than 5% of our budget

5-10% of our budget

> 10% of our budget

Based on your previous answers, do you see your financial stewardship as an opportunity (*we have the capacity to increase our giving*) or an impediment *(we are maxed out on our giving capacity and could be in jeopardy)* for your sustainability as a congregation? Yes No

## **Financial Resources Profile**

Annual unrestricted contributions $

|  |  |  |
| --- | --- | --- |
| Giving Units |  | |
| Church Cash/Investments restricted by donor | 1 | $ |
| Church Cash/Investments restricted by session | 2 | $ |
| Church Cash/Investments unrestricted | 3 | $ |

Church Total Cash/Investments (excluding land/building) Total $

Annual Operating Expenses (excluding Pastor Salary & Benefits) $

Cash/Investments available for Pastor Salary $

How will Pastor salary be funded?

Current Contributions

Existing Funds

## Please attach copies of the last two years church audit/review.

Pastoral Compensation

We are able to provide a full-time defined compensation (*Salary+Housing+SECA*) to our pastor of at least the minimum for a first call pastor.

Yes No

If not, what is the level of defined compensation you are able to provide a pastor (based on your recent actual giving numbers)?

If your giving reflects the ability to pay a less than full-time call are you able to afford a:

3/4 time call

20 hour a week call

less than 20 hour a week call

Are you able to provide full benefits coverage (*health, death and disability, retirement)?* (Full benefits through the Board of Pensions is 37 percent for installed pastors in the traditional Pastor's Participation

plan.) Yes No

If not, what level of benefit coverage are you able to provide a pastor in an uninstalled position?

Coverage through the BOP Cafeteria Plan

Contribution to a Retirement Savings Plan

Other (explain)

We are able to provide continuing education, professional expenses and mileage reimbursement to our pastor in accordance with presbytery guidelines. Yes No

Based on our answers above, do we see pastoral compensation as a strength or a weakness for our sustainability as a congregation?

# Sustainability – People

## Leadership

We regularly have enough people to serve on Session Yes No

We regularly have enough people to serve on committees Yes No

We regularly have enough people to lead the most important ministries we do Yes No

Has the pastor and or other leaders in the congregation attended stewardship,

financial management, fundraising training? Yes No

Does your congregation pledge, teach tithing and generous giving? Yes No

Based on our answers above, do we see our leadership as a strength or a weakness for our sustainability as a congregation?

Yes \_\_\_\_\_\_No \_\_\_\_\_\_

## Worship

We have enough people to prepare for and provide worship leadership on a weekly basis Yes No

What has our average worship attendance been for the last 5 years? 2020

2019

2018

2017

2016

Are we growing?

Holding steady?

Declining?

Based on our previous answers, do we see our worship as a strength or a weakness for our sustainability as a congregation? Yes No

## Rate how you would identify the following for your sustainability as a congregation (strength, weakness, opportunity, or an impediment):

Facilities

Building age and maintenance Current building usage

## Finances

Financial Stewardship Pastoral Compensation

## People

Leadership Worship

Congregations need resources to sustain ministry. The three primary resources include facilities, finances and people. Reflect on what you filled out above. Then use the following questions to estimate your sustainability.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Do you have what you need to maintain or expand ministry? | **Declined to not sustainable**  **1** | **Declining but still sustainable 2** | **Maintaining**  **3** | **Growing or Increasing 4** |
| **Facilities Capacity –** maintainability and usage of facilities |  |  |  |  |
| **Financial Resources –** to pay for staffing, ministries, etc. |  |  |  |  |
| **People Power** – to provide leadership, strengthen and sustain one another |  |  |  |  |
| **Write the lowest rated sustainability area here.** | | | | |

Resource links:

[Per Capita](http://oga.pcusa.org/section/departments/per-capita/) description from OGA

[Living by the Gospel](http://www.pensions.org/file/our-role-and-purpose/the-connectional-church/living-by-the-gospel/Documents/pln-619.pdf/) from the Board of Pensions [Pathways to Renewal](http://www.pensions.org/our-role-and-purpose/the-connectional-church/living-by-the-gospel/pathways-to-renewal) from the Board of Pensions

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Heartland redesigned COM into three primary teams

(we divided up based on the reality of people having specialized skills and limited areas would make the COM more effective and attractive to serve)

1. **Transition teams**- they join with a congregation from when a pastor notifies of resignation to the installation
2. **Expanded ministries**- they take care of the jots and tittles of contracts and requirements, they also work with CRE’s/CP’s  Validated ministries and support gatherings of other areas of ministry- pastors serving yoked churches, interim pastors, retired pastors etc.
3. **Congregational relations**- this group is the one who connects and communicates regularly through liaisons to the pastors and clerks of session and session.  They check in with pastor (s)  quarterly, inform the session and congregation who they are and contact information, get on mailing or email blasts, celebrate and share concerns and celebrations both ways congregation to COM and vice versa.  They are the ones who do triennials (although our process is much simplified than the old process) .

Then we have two supportive adjunct COM committees

**Pastoral Care Team**- they are trained separately and assigned pastors to reach out to check in and be available if needed or wanted- no sharing with COM information

**Mediation Team**- they were trained by Leader Wise in mediation skills and go out as requested by COM to mediate conflict in churches

We also created an **Expert AC**- they  are a standing AC of the presbytery- they meet with the church when the church is ready to start discussions about closing or what is next.  They accompany them through all the steps to the sale of the property- this is handed off to the Trustees . This eliminated every AC arriving at the end with such a variety of details some done or undone, to a cohesive group with a checklist and training to know what needs to happen on every level.