

CONGREGATIONAL DATA COLLECTION SHEET

This is a tool for gathering important information about the congregation when a clergy leader is departing. The exiting clergy person and wardens or other lay leaders could work through this together so both the data and the "spirit of the data" are captured, but it could also just serve as a checklist for the kind of data that needs to be transferred to new leadership.

Completing this check-list will help provide congregational leaders with a complete picture of year-round congregational life, as well as information needed for the congregation's Profile or Letter of Ministry Goals.

CONGREGATION *name* _____

From the Parochial Report for the year of _____

_____ Number of Baptized Members _____ Number of Confirmations

_____ Number of Baptisms _____ Number of Burials

_____ Number of Marriages

_____ Number of Confirmed Communicants

Attach to this document if you have the following:

The mission and/or vision statement

Any short/long term goals developed during a recent Mutual Ministry Review or planning process

FINANCIAL STEWARDSHIP

For this current year:

_____ Number of Pledges _____ Mean (average) and _____ Median Pledge

_____ Total amount (\$) pledged

_____ Total Revenue from Parish Giving/Fundraising

_____ % Budget from Parish Giving _____ % Budget from Endowment/Savings

_____ Total Expenditures

What most closely describes your approach to FINANCIAL Stewardship? (check all that apply):

_____ A Stewardship Committee that meets year-round

_____ Vestry has and uses a Vestry Financial Stewardship Statement

_____ Vestry teaches and practices tithing and proportional giving in developing the budget

_____ Annual Appeal Letter

_____ Festive Meal

_____ Every Member Canvas

_____ Cottage/Small Group Meetings

_____ Other (describe) _____

WORSHIP

Sunday Worship:

_____ Number of Sunday Services Service Time(s) _____

_____ Average Sunday attendance (ASA) at each service

Average Sunday Attendance:

_____ July-August _____ September-June

Weekday Worship:

_____ Number of Weekday Services _____ Average weekday attendance

Continue through summer? _____

Typical Style of Worship (check all that apply):

_____ Holy Eucharist Rite I _____ Morning prayer

_____ Holy Eucharist Rite II

Regular services outside church (e.g. at nursing homes)? _____

How often? _____ Describe: _____

Seasonal Traditions (Christmas Pageant, Saints' Day, Penitential Order, Secular Holidays, etc.).

Weekly traditions:

Other regular worship opportunities (e.g., Prayer Group; healing services) describe:

Music

What hymnal sources do you use? _____

Who selects the music? _____

Is the service ever sung? Yes ___ No ___ When? _____

Do you have a choir? Yes ___ No ___ When do they rehearse? _____

Do you have a children's choir? If so, when do they sing? _____

What services does the choir sing? _____

Year round? _____

List musical traditions, such as Service Music, Doxology, hymns at Communion, etc.

Worship Ministers

Acolytes: Yes ___ No ___

Who directs them? _____

Phone number/e-mail: _____

Eucharistic Ministers: Yes ___ No ___

Who directs them? _____

Phone number/e-mail: _____

Worship Leaders: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

Lectors: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

Eucharistic Visitors: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

How do they serve? (Communion in people's homes? Nursing homes? Hospitals?)

Altar Guild: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

Ushers: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

Greeters: Yes__ No __

Who directs them? _____

Phone number/e-mail: _____

Other Worship Ministries? (describe)

ADMINISTRATION

Do you have congregational by-laws? _____

Date of last revision? _____

Please attach a list of vestry members, all congregational organizations and their chairpersons with contact information for each person.

Staff

Attach a list of staff, both paid and volunteer, listing position and time of work.

Who supervises staff members? _____

Who evaluates staff? _____

Is there a formal process? _____

Who hires/fires? _____

Parish Records

Service Register up to date? _____ Where is it? _____

Parish Register up to date? _____ Where is it? _____

Where are Baptism, Marriage, Burial, and Confirmation Books? _____

Where is Parish Directory/Information about Parishioners? _____

Who maintains records? _____

Where and how are confidential records kept? _____

Where and how are records of transfer kept? _____

Who has access to congregational files? _____

Financial Records

Last audit? _____ By whom? _____

Who pays the bills and payroll? _____

Who deposits money? _____

Who signs checks? _____

Who maintains pledge records? _____

Who counts money? _____

Where are financial records kept? _____

What types of accounts are there? _____

Which are restricted and unrestricted? _____

Do you have an Endowment? _____ Amount _____

Please attach a list of bank accounts for both the congregation and organizations.

PROPERTY

Who schedules use of church property? _____

Who coordinates and keeps track of keyholders? _____

Who has keys? _____

How many pieces of property/what kind? _____

Do you have a written record / history of repairs? _____

Who keeps this? _____

Present state of repairs? _____

Attach list of current vendors/suppliers and their contact information.

Attach list of repair people/firms and their contact information.

Items of particular historical or monetary value (list)? _____

Is there security for valuables? _____

Insurance? _____ With whom? _____ Adequate? _____

Do you have an Inventory of Property? _____ Done when? _____

Where is it? _____

Fire alarm/sprinkler system? _____ When last tested? _____

Fire extinguishers last tested _____

Handicapped accessibility into all facilities? _____ Plans for such? _____

Cemetery or Columbarium? _____ Records up to date? _____

Who keeps this record? _____

Affiliated day or boarding school? _____ Grades: _____

Number of students _____ Number of teachers _____

Relationship to congregation, especially in terms of governance? _____

Other affiliated organization(s)? _____

Describe: _____

CHRISTIAN FORMATION

Church School

Number of students _____ Grades _____

Number of teachers _____

Name of Curriculum(a) used: _____

Adult Education: _____

Courses/programs offered: _____

Number participating _____

Do you have congregation-sponsored retreats? _____

When was the most recent? _____

What was the topic? _____

Do you offer (check all that apply):

New Member education _____ Confirmation preparation _____

Teacher training _____ Men's/Women's Groups _____

Bible study _____

EVANGELISM

Specific Programs and Activities _____

Leadership? _____

Population targeted? _____

Committee? _____

PASTORAL CARE

Who does it? _____

For whom? _____

OUTREACH/SERVICE TO THE NEEDS OF THE WORLD

Specific Programs _____

Who coordinates these? _____

Number of people involved _____

COMMUNITY/ECUMENICAL/INTERFAITH INVOLVEMENT

Current involvement in community, ecumenical or interfaith groups? _____

List the group(s) and provide contact information: _____

EPISCOPAL IDENTITY/ETHOS

Involvement in Diocesan activities _____

Timely payment of Diocesan Assessment/Asking? _____

Episcopal Charities—do you contribute? How much during the past year?

United Thank Offering _____

Presiding Bishop's Fund _____

Episcopal Relief and Development _____