

The Bishop's Task Force on Parish Viability

The Bishop's Task Force on Parish Viability has made its final recommendations to Bishop Ralph Spence following four months of intensive study and development.

Diocesan Clergy, Archdeacons, and senior staff of the Diocese were given an overview at a Clericus Meeting held at St. Matthew on-the-Plains on March 8, 2005. The Task Force's primary goals were to develop a framework for collecting benchmark data and to create effective assessment tools for evaluating parish and regional viability. The Task Force focussed on finding objective ways to help parishes understand the reality of their situations through assessment, providing more useful information, tools, and processes, and assisting parishes with effective interventions.

Task Force members Archdeacon Lynne Corfield, Reverend Amy Cousineau, Catherine Cumming, Archdeacon Dr. Fred Gosse, Reverend Canon David Howells, Pat Leece, Diocesan Treasurer Bob McKinnell, Jim Newman (Chair), and Reverend Canon Michael Patterson based their work on the following principles, beliefs, and assumptions:

1. *Throughout their lifespan all parishes will experience cycles of growth, stagnation, decline and renewal. Failure to thrive does not necessarily indicate a lack of parish will or commitment, but may be due to forces which may be external to the parish and transient in nature.*
2. *Viable parishes are necessary for a viable Diocese. All parishes are committed to the long-term health and viability of the Diocese and the Diocese is committed to building viable ministries in its parishes.*
3. *The Diocese's financial resources are currently the major limiting factor to its ability to sustain parishes. The Diocese must make difficult choices in allocating its financial resources to parishes most likely to become or remain viable. While the Diocese may continue to sustain parishes for a time when their viability is challenged, it cannot financially sustain any parish indefinitely.*
4. *The Diocese requires a process that is comprehensive, fact-based, objective and participatory to facilitate decision making about resource allocation and parish viability. To be equitable and comprehensive, this assessment process will be used throughout the Diocese.*
5. *The Diocesan assessment process will be based on an examination of the financial, mission and leadership characteristics of the parishes.*
6. *The impact of Diocesan choices may be painful for the parishes that can no longer be sustained. Parishes that are no longer sustainable will be treated with dignity and consideration.*

At the outset the Task Force reviewed the work of the Diocese of Toronto's Strategic and Sustainable Ministry Working Group and the Diocese of Niagara's Mission Strategy and Planning Committee. This facilitated the development of criteria and a methodology for evaluating parish viability. A process was designed to gather additional parish statistical information, and integrated with the year-end online collection of data by the Diocesan Finance Department.

The primary outcome of the Task Force is a Parish Assessment Tool that uses a seven step approach to determine parish health and viability based on evaluations of parish mission, parish finances, and parish leadership. The process is self guiding and self documenting. It is intended for use by the Bishop, the Executive Archdeacon, and the Regional Archdeacons. Other senior staff may be involved in assembling data and assisting parishes with remedial and other consultative roles. Volunteer Parish Consultants may be requested to work with parishes under the direction of Synod staff.

Task Force Chair Jim Newman acknowledges that assessment is almost always disconcerting, but suggested that clergy and parishioners in Niagara should be much more alarmed if such a process were not being implemented. He noted that learning more about matching parish's needs with available resources should lead to more effective application of time, talent, and treasure.

More details and information will be provided at regional Clericus meetings, clergy days and workshops. Two areas, Port Colborne and Undermount, have requested first use of the assessment tool. The Parish Assessment Tool is a living document and further modifications may be recommended as more familiarity is developed with its use.

Parish Assessment Tool

Section	Contents:
1	The Parish Assessment Tool <ul style="list-style-type: none">○ Introduction○ Methodology○ Practice and Confidentiality○ Application
2	Parish Viability Evaluation – A Seven Step Process
5	Financial Page
6	Parish Profile <ul style="list-style-type: none">- Matrix- Quick Summaries- Recommendations for Action and Follow Up
7	Principles/Beliefs/Assumptions

Prepared by the Bishop's Task Force on Parish Viability
*Archdeacon Lynne Corfield, Reverend Amy Cousineau, Catherine Cumming, Archdeacon Dr. Fred Gosse,
Reverend Canon David Howells, Pat Leece, Diocesan Treasurer Bob McKinnell, Jim Newman (Chair), and
Reverend Canon Michael Patterson*

Anglican Diocese of Niagara
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1. The Parish Assessment Tool

Introduction

This assessment tool uses a consultative and discerning approach to determine parish health and viability based on an evaluation of parish mission, parish finances, and parish leadership. It guides the assessors through the documentation of recommendations and the further monitoring of interventions where required.

Methodology

Assessment of a parish involves seven steps:

1. Scoring mission criteria
2. Scoring financial criteria
3. Plotting these scores on the **PARISH PROFILE** matrix
4. Reviewing the Financial Page
5. Reviewing the Parish's Leadership
6. Completing the Quick Summaries and Recommendations on the **PARISH PROFILE**
7. Monitoring parish progress

Practice and Confidentiality

Due to the confidential nature of the assessment, this tool is intended for use by the Bishop, the Executive Archdeacon, and the Regional Archdeacons only. Senior staff such as Directors, Treasurer and Controller, and parish priests may be involved in assembling data, and assisting parishes with remedial and other consultative roles. Volunteer Parish Consultants may be requested to work with parishes under the direction of Synod staff.

Application

This tool may not be appropriate for non-viable parishes that are already in the process of closing or are in “emergency palliative care” and where special strategies are in place to merge or mesh congregations. Instead it is designed to focus assessment and remedial strategies on those parishes in the “undecided” group, i.e. those for which intervention is important and necessary to determine their viability, or to maintain and improve their viability.

2. PARISH VIABILITY EVALUATION - A SEVEN STEP PROCESS

Parish: _____

Date: _____

STEP 1

SCORE THE FOLLOWING MISSION CRITERIA FOR THIS PARISH

COMMENTS

	SCORE	
GROWTH POTENTIAL IN THE COMMUNITY		
High potential for growth - immediate or in the short-term	2	
Moderate potential for growth - immediate or in the short term	1	
No growth likely to occur	0	
Parish area is in decline	-1	
Parish area is declining rapidly	-2	
LOCATION, ACCESS AND PARKING		
Excellent	2	
Good	1	
Adequate	0	
Poor	-1	
Unacceptable	-2	
VISION FOR MINISTRY		
The parish has a documented and compelling vision that is shared throughout the parish, and is within the parish's capacity to realize	2	
The parish has a partially documented shared vision for ministry; needs some work to be considered doable	1	
The parish has a partially documented vision for ministry but it needs considerable work	0	
The parish has some rudimentary concepts of a parish vision	-1	
No evidence of any parish vision	-2	
AGE OF CONGREGATION		
Very closely reflects the demographics of the community it serves	2	
Closely reflects the demographics of the community it serves	1	
Some similarity to the demographics of the community it serves	0	
Poorly reflects the demographics of the community it serves	-1	
Does not reflect the demographics of the community it serves at all	-2	
AVERAGE WEEKLY ATTENDANCE		
Attendance is growing rapidly	2	
Attendance is growing slowly and steadily	1	
Attendance is flat	0	
Decline in attendance	-1	
Very significant decline in attendance	-2	
OUTREACH		
Well-supported outreach initiatives which have a significant impact on the quality of life in the community	2	
Some outreach initiatives with modest impact	1	
A few outreach initiatives with limited impact	0	
Very few outreach initiatives with very limited impact	-1	
Outreach non-existent	-2	
BUILDINGS		
Buildings are very compatible with the parish's vision	2	
Buildings are adequate to serve the parish's vision	1	
Buildings can be made adequate to serve the parish's vision with some renovations	0	
Buildings are somewhat impairing the parish's vision (even with some renovations)	-1	
Buildings severely impair the parish's vision	-2	
MISSION CRITERIA TOTAL (MAX 14)		

STEP 2

SCORE THE FOLLOWING FINANCIAL CRITERIA FOR THIS PARISH

COMMENTS

	SCORE	
CURRENT OPERATIONS (INCLUDING DMM AND PAYROLL OWING TO DIOCESE)		
No current debt; all payments are up to date	2	
Little current debt (< 10% of annual envelope income)	1	
Considerable current debt (between 10% and 25% of annual envelope income)	0	
Serious current debt (= or > 25% of annual envelope income)	-1	
Very serious current debt (> 50% of annual envelope income)	-2	
SOURCES OF INCOME		
Income from regular donations meets or exceeds expenses (low reliance on other funding)	2	
Inc. from regular donations less than expenses; balance made up by other funding sources that appear secure	1	
Income from regular donations is less than expenses, and balance is made up by vulnerable external funding (e.g. could be lost in the short-term, i.e. if daycare leaves)	0	
Income from regular donations is less than expenses; no other current sources of funding	-1	
Income from regular donations is less than expenses, no other likely sources of funding, parish is vulnerable to bankruptcy	-2	
Endowments/capital fund (other than special purpose capital fund) is generating income that is not needed for operating costs		
Endowments/capital fund is generating income used for operating costs	1	
Endowments/capital fund is occasionally being spent on operating costs	0	
Endowment capital is being spent regularly to supplement operating income	-1	
Endowments/capital is being spent rapidly on operating costs and not being replenished	-2	
Formal and sophisticated year-round financial development in place	2	
Some formal stewardship and planned giving program activity	1	
Occasional informal stewardship and/or planned giving activity	0	
Little stewardship and/or planned giving activity	-1	
No stewardship or planned giving activity at all	-2	
DONOR BASE		
Meets all its current obligations and readily responds to all mission challenges	2	
Meets all its current obligations and has some capacity to respond to mission challenges as they occur	1	
Barely meets current obligations; little additional capacity for mission challenges	0	
Does not meet current obligations; unlikely to respond to mission challenges	-1	
Needs major grants to meet obligations; could not respond to mission challenges	-2	
IDENTIFIABLE GIVERS		
Average gift per identifiable giver is significantly above the diocesan average of \$750 per year	2	
Average gift per identifiable giver is above the diocesan average	1	
Average gift per identifiable giver is at the diocesan average	0	
Average gift per identifiable giver is below the diocesan average	-1	
Average gift per identifiable giver is far below the diocesan average	-2	
Significantly increasing number of identifiable givers	2	
Slowly increasing number of identifiable givers	1	
Number of identifiable givers is static	0	
Decline in number of identifiable givers	-1	
Serious decline in identifiable givers	-2	
FINANCIAL TOTAL (MAX. 14)		

STEP 3 a ON THE PARISH PROFILE, MARK THE POINT ON THE MATRIX WHERE THE MISSION AND FINANCIAL SCORES INTERSECT;

b ADD AN ARROW TO THE POINT TO INDICATE THE DIRECTION OF THE CURRENT "PARISH TREND" (i.e getting stronger or getting weaker)

c COMPLETE THE QUICK MISSION SUMMARY ON THE PARISH PROFILE.

STEP 4 a REVIEW THE FINANCIAL PAGE FOR THIS PARISH.

b COMPLETE THE QUICK FINANCIAL SUMMARY ON THE PARISH PROFILE.

STEP 5 a CONSIDER THE PARISH LEADERSHIP USING THE OUTLINE BELOW AND OTHER PERTINENT RESOURCES,

The Diocesan Mission Strategy & Planning Committee has identified some criteria and factors for consideration:

History of parish leadership (clergy & lay leaders)

Ability of the current leadership to meet the parish's challenges

Energy and commitment levels

Concern about workload, burnout, etc.

Eagerness/willingness to learn/apply remedial tools (e.g. NCD, Narrative Budgeting)

Pastoral relationship with congregation

History of conflict or crisis (including prior interventions e.g. letter from Bishop)

Ability to use history of conflict as an asset in reaching goals

Degree of impairment caused by conflict with respect to reaching goals

b COMPLETE THE QUICK LEADERSHIP SUMMARY ON THE PARISH PROFILE.

STEP 6 COMPLETE THE "RECOMMENDATIONS FOR ACTION AND FOLLOW UP" ON THE PARISH PROFILE.

STEP 7 TAKE RECOMMENDED ACTION, MONITOR PARISH PROGRESS, AND FOLLOW UP AS REQUIRED.

5. FINANCIAL PAGE

Notes:

Shaded boxed data is supplied by parish

PARISH	DATE
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Identifiable Givers (IG)	Avg. Sun Attend.	IG as % Sun. Att'd.	Adults Baptised	Children Baptised	Total Baptised	Funerals	Ch School Students	Avg. Yth Group	Avg. Env. Gift
Envelope Income	Open Income	Education Income	Investmt. Income	Endowmt. Income	Rental Income	Fundrng. Income	Misc. Income	Other Income	Total Income

Year 2004

As % of Total Income:									
Envelope Inc.	Open Inc.	Educ. Inc.	Invest. Inc.	Endow. Inc.	Rent. Inc.	Fundr. Inc.	Misc. Inc.	Other Inc.	Total
Clergy Expense	Staff Expense	Education Expense	Property Expenses	Worship Expenses	Evangel. Expenses	Outreach Expenses	Other Expenses	DMM Expenses	Total Expenses

Year 2004

As % of Total Expenses:									
Clergy	Staff	Education	Property	Worship	Evangel.	Outreach	Other	DMM	Total
Investm'ts/Endowmt's/Capital Funds	Restricted	Unrestricted	Transferred	Total	Owing to Synod Payroll	DMM	Other	Total	December 31, 2004

Year 2004

Aged Acc. Pay.	< 30 days	31-60	61-90	91-120	> 120	> 180	> 365	Total
Payroll								
DMM								
Other								
Total								

Year-end Surplus/Deficit	2004	2003	2002	2001	2000
Unusual Income					
Transferred from Capital Reserves					
Transferred from Invest's/Endowmt's					
Year end owing to Synod					
Oper. Line of Credit: Approved Limit					
Oper. Line of Credit: Outstanding Bal.					

Other Information	2004	2003	2002	2001	2000
Year-end Surplus/Deficit					
Unusual Income					
Transferred from Capital Reserves					
Transferred from Invest's/Endowmt's					
Year end owing to Synod					
Oper. Line of Credit: Approved Limit					
Oper. Line of Credit: Outstanding Bal.					

7. Principles/Beliefs/Assumptions

The Bishop's Task Force on Parish Viability acknowledges the following:

1. Throughout their lifespan all parishes will experience cycles of growth, stagnation, decline and renewal. Failure to thrive does not necessarily indicate a lack of parish will or commitment, but may be due to forces which may be external to the parish and transient in nature.
2. Viable parishes are necessary for a viable Diocese. All parishes are committed to the long-term health and viability of the Diocese and the Diocese is committed to building viable ministries in its parishes.
3. The Diocese's financial resources are currently the major limiting factor to its ability to sustain parishes. The Diocese must make difficult choices in allocating its financial resources to parishes most likely to become or remain viable. While the Diocese may continue to sustain parishes for a time when their viability is challenged, it cannot financially sustain any parish indefinitely.
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