

RETREAT # 3 updated January 2024

Visioning and writing the next chapters.



Turn the Page: Discovering, Discerning and Connecting the Pieces of our Church story.

Purpose of Retreat

- Spend time reflecting, dreaming, visioning
- Developing a Vocation Statement, Visioning and Planning
- Planning next steps to complete the Discernment process and Report.

What we have learned so far...



- Learned about the church's history and demographics
- Listened to Congregational Stories
- Began Discerning where God is in mission and ministry
- Began the process of writing our story

Preparation:

- Distribute notes and Reports from Previous Retreats and Events to the team
- Distribute notes and reports from Storytelling Season and Discernment Event to the team

Participants:

- Discernment Team
- Session members
- Church staff – paid and volunteer (especially staff who would be involved in implementing steps)

Online Version – This retreat can be done online. Plan to have break out rooms for reflection times. Using the Google jamboard or other online white board app would be helpful. Online suggestions are in blue.

Team Retreat # 3

Planning and Writing the Next Chapters

Dwelling in the Word

Instructions

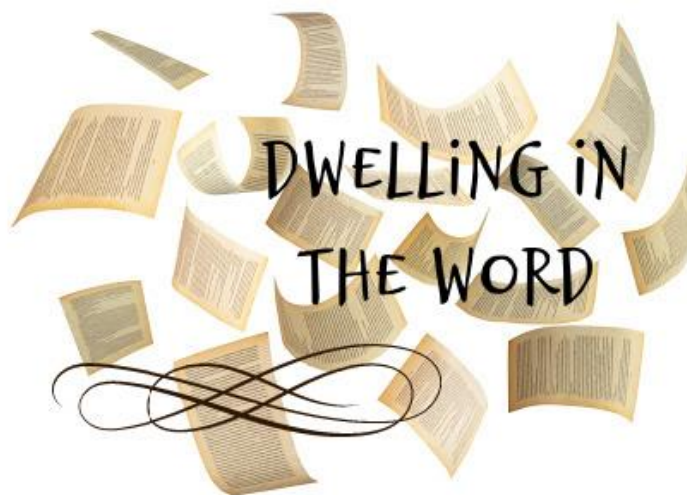
Read Luke 10: 1 -12 aloud. Others can follow along in Bibles or handouts or can simply listen.

Allow some silence to unfold after the reading.

Each person finds a reasonably friendly-looking stranger to listen to, asking the stranger to say what picture or question popped up or where his or her imagination was caught as the passage was read. The pair listens to one another well enough to report what the other has said. They also exchange names, so that each can introduce the other during the reporting.

The pairs return to the larger group and introduce their partners and say what they heard from one another. The retreat leader(s) make sure that everyone has been introduced and, if there's time, some further discussion of the passage can take place.

Take time to reflect together on ways Dwelling in the Word can be used in the Congregation during this discernment or transitional time.



What have we learned?

What are the stories we are gathering and discovering?

As a group debrief the Storytelling Season. Record your answers on large paper [or on a white board application computer](#).

- What did we learn from the Storytelling Season?
 - What did you observe? What are the patterns? What surprised you? What didn't?
- What stories were told often? What stories are missing? Where was the sadness? Where was the joy?
- What stories resonated the most with you?

What did we learn from the Spiritual Discernment event?

As a group debrief the Spiritual Discernment Event. Record your responses on large paper [or on white board app](#).

- What did you observe? What were the patterns? What surprised you? What didn't?
- What was the sense of the group? What were the emerging sense of God's call for the congregation?

Time for Reflection

Take time for each participant to find a quiet space to write down a few thoughts and ideas. [Online Version – Break the group in single breakout rooms and give them 10 to 15 minutes to write down ideas and reflect. Have the participants write down the reflection questions.](#)

Using all that has been discussed during this retreat and previous retreats reflect on the following questions. After a period of time gather as a larger group to share your thoughts and ideas writing them on large paper [or whiteboard app](#).

- What are some emerging or ongoing needs of your community/neighborhood? What are ways that the congregation is already reaching out to those emerging or ongoing needs? What are ways that congregation could reach out to those emerging or ongoing needs?

Take a short break before the next section

Where is God Calling Us in Mission and Ministry?

The Vocation Statement

What is a Mission/Vocation Statement?

God's call is our vocation as a community.

A vocation is more than just a mission project or ministry program. An individual or community vocation is God's call to engage genuinely in a particular work or mission. A vocation is a deep commitment and passion for what God is doing ministry in the neighborhood and in the world.



The purpose of the Vocation Statement is to describe the purpose, mission, and call of the congregation's ministry *in this time and place*.

- The Vocation statement should reflect the stories gathered from the previous work.
- The Vocation Statement normally should be one sentence or short like a tweet and easy to memorize.
- The statement will have a "forward movement" and not be about the past history or identity of the congregation.
- The visioning, planning and direction of the congregation should be reflected in the vocation statement.

As a group begin by brainstorming single words, short phrases, and ideas that relate to the call of the church. Use all that you have learned from previous retreats, events and studies to assist you in brainstorming the vocation statement.

Keep working the words and thoughts until something emerges. You may revise the wording several times before the final statement.

Examples of Vocation statements and other information is a few pages from [here](#).

What is God's vision for us? What is God up to?

Where there is no vision the people perish
Proverbs 29:18 (KJV)

*If people can't see what God is doing, they stumble all over themselves; But
when they attend to what he reveals, they are most blessed.*
Proverbs 29:18 (The Message Bible)

Dictionary.com provides the following as definition for Vision:

1. The act or power of sensing with eyes; sight
2. The act or power of anticipating that which will or may come to be: prophetic vision
3. An experience in which a personage, thing, or event appears vividly or credibly to the minds, although not actually present, often under the influence of a divine or other agency.
4. Something seen or otherwise perceived during such an experience
5. A vivid, imaginative conception or anticipation

A congregation's vision for ministry is a combination of all the above. The vision is not the vision of one person but the vision of the whole community. Vision for ministry is not defined as looking back to when the pews were filled, and children packed the church school classrooms. Vision looks forward to what can be in the context of the present.

Using your Vocation statement (*or beginnings of a vocation statement*) brainstorm what the vision of the church might look like 6 months, 1 year, 3 years or more from now.

*This is the time to be creative, imaginative
and to take some risks. This is the time to
dream dreams for the future ministry of your
congregation*



Using mutual invitation invite each person to answer the following:

God has a future for this congregation. Using the information that has been gathered so far where do you see, dream or believe is the future God is leading, calling or pointing you towards?

Capture these ideas and visions on large paper [or a whiteboard app](#)

Where do you see patterns, commonalities, differences? Where do you resonate? Is there one thing or more that keeps emerging in your conversations. Narrow your ideas to 2 to four ideas.

After everyone has shared take a short break or a few minutes to reflect quietly.

Action Steps

Again, using mutual invitation reflect and share on the following question:

With this vision (or visions) where do you believe the congregation will or can be in six months, one year, three years?

Capture the ideas and dreams on a white board or paper or [on a whiteboard app](#).

Using the Vocation Statements, Visioning and Action Plans start writing down some possibilities. No final decisions are being made, just ideas to ponder and pray about.

Examples of

Vocation Statements, Visioning and Action Steps

Example # 1

Vocation Statement

After discovering that 70% of the children in the community lived with food insecurity the congregation decided they would do something about it.

When did we see you hungry Lord?

Matthew 25: 44a

Our Vocation is to feed the hungry of our county

Visioning for the future

- *Our Vision is that 6 months from now we will have established an ongoing food drive for the local food pantry.*
- *One year from now we will have started a satellite food pantry at our location and started plans for a community garden on our property.*
- *Three years from now we will be working with our county government on ways that we can stop hunger in our community.*

Action Steps:

In the first six months:

- The youth group leader volunteered the Middle School group to do the Souper Bowl Sunday.
- The Christian education Committee agreed to add a unit about feeding the hungry and the Adult Seminar will do a whole month about using Matthew 25 material about feeding the hungry
- The session will plan a food drive six months after the Middle School Souper Bowl.

In the first year

- Session will invite a representative from the county food pantry to speak to the session and/or congregation about what it would take to be a satellite food distribution center.
- Will work with the new pastor about ways to use the green space to become a community garden.

- Invite local gardeners to share ideas. Explore how other congregations started community gardens

Example # 2

Vocation Statement

During their discernment process they learned the young families were stressed and overwhelmed. This small congregation believed that they could help even just a little.

Come to me, all who labor and are heavy laden, and I will give you rest.

(Matthew 11:28)

God calls us to be a place of rest and relaxation for those who are weary

Visioning for the Future

- *Our Vision is in the first six months we will have started a Saturday morning Kid's Kraft program where parents can drop off their elementary age children to learn a new skill such as cooking, building a bird house or gardening.*
- *In a year we would like to have a place where young women can come for a spiritual retreat.*

Action Steps:

In the first six months:

- *The teachers of the congregation will plan a program for the first Saturday of each month of the school year for elementary age children.*
- *Volunteers will be trained and vetted for working with children.*
- *Communication will be developed to send out introducing the program.*

In the first year:

- *The men's group will clean out the back parlor and clean the patio of "stuff"*
- *The pastor will develop an event or find a facilitator to provide morning retreats for young women.*

Example # 3

Vocation Statement

The needs and ministries of the community were many but there did not seem to be enough volunteers prepared to meet or address the needs. This congregation believed that with their facilities and location they could be a “training” center for volunteers and for developing disciples.

Go out and train everyone you meet, far and near, in this way of life..instruct them in the practice of all I have commanded you.

(Matthew 28: 18 -20 The Message)

God calls us all to be disciples.

*We are to keep learning and living what
we have learned and to teach others to serve God.*

Visioning for the Future:

- Our vision is six months from now we will revive our online Bible study for young adults focused on becoming disciples.*
- One year from now we will have started a men’s program focused on helping other men who are struggling with depression.*
- Two years from now we will train volunteers and open a center for parents and families who have lost a loved one to opioids.*

Action Steps:

First six months:

- Christian Education director (or team) will develop a plan for online discipleship classes for all ages*

In the First year:

- Appropriate session committee will Invite local mental health providers to speak at the adult forums on mental health and how a congregation can connect with what is already happening in the community*
- Invite grief counselors to share ideas on how to help parents and other family members learn to live with the loss of a loved one to opioids.*

Third year:

- Create a space in the classroom near the parking lot that can be used for a center for those living with loss and grief.*

Example # 4

Vocation Statement

The composition of the neighborhood was part young Puerto Rican families, part long time older white residents, and part Korean immigrants. The congregation was all older white people, some who lived in the neighborhood and many who drove in from other places but once lived there.

**There is no longer Jew or Greek, there is no longer slave or free,
there is no longer male and female; for all of you are one in Christ
Jesus.**

(Galatians 3:28)

God calls us to be as diverse as the neighborhood
in which the church building resides.
God calls us to be a neighborhood church.

Visioning for the future

- *Six months from now we will have started a class on How to be an Antiracist.*
- *One year from now we will have intentionally engaged in community conversations about racism.*
- *Three years from now we will be better than we are today.*

Action Steps:

Six months:

- Session will hold online class on the Book How to be an Anti-racist (or something similar)

Within a year

- Participants in the book group will share their learnings and stories about racism during worship services. These will be recorded and posted on the church YouTube channel
- Session will invite people from the community or other congregations to share their stories at a church dinner or other location.
- The church will engage in an event to provide support in of the local community.



Planning Next steps

As a group make plans on how the following will be completed. They are not completed at this meeting this is the work that needs to happen before the final report is approved. [These events can be done in person or an online using zoom or similar video conference platform.](#)

- Financial Health Report
 - This can be done at any time during the Discernment process though recommend that you do it close to the end of the Discernment process. This is done by the Financial leaders and the session.
- Action Steps Event
 - Session and Discernment Team meet to finalize the Vocation, Visioning and Action Steps.
- Writing the final Report
 - Done by the Discernment Team using the Report Format.
- Final steps for the Final Report
 - Who will collate, curate and write the final document?
 - What is the timeline?
 - Who needs to see or have input before it is finalized? Have you kept the appropriate Presbytery partners in the loop?



Financial Health Assessment

As you prepare for your search for new leadership you will have to demonstrate to the Committee on Ministry that your congregation has the financial capacity to call a pastor. *Also, this is an opportune time to do a financial health assessment to gain some insight on your future financial capacity and sustainability.*

Collect the following information

- Year-end financial reports for the last two completed years
- Year to date financial report

The Financial leader or staff should complete the following for the retreat using the Presbyterian Foundation Financial Health Assessment.



Where is your church on the road to financial health? Do you have all the resources you need? Is there room for improvement in the areas of stewardship and generosity?

Financial Health Assessment Session Event

As you prepare for your search for new leadership you will have to demonstrate to the Committee on Ministry that your congregation has the financial capacity to call a pastor. *Also, this is an opportune time to do a financial health assessment to gain some insight on your future financial capacity and sustainability.*

Collect the following information

- Year-end financial reports for the last two completed years
- Year to date financial report

Answer the following questions before the event

Income

- What percent of the operating Income comes from current giving/pledges?
- What percentage of the operating income comes from building rentals? This could include one time use or leases on the church building or other property such as the manse.
- What percentage of the operating income comes from endowment income or investment income?
- What percentage of the operating income comes from principle of investments?
- What are other sources of income?

Expenses

- What percentage of operating budget is for Staff/Personnel budget?
- What percentage of the operating budget is for debt service?
- What percentage of the operating budget is for building related costs (excluding mortgages and loans)?
- What percentage of the operating budget is dedicated to mission and projects that primarily benefit non-members or the local community. Do not include Per capita or Presbytery Mission giving.
- What percent of your Per Capita was paid to the presbytery last financial year?

Other Information needed for the Financial Health Assessment Event

- Present Endowment Program information
- Planned Giving/Bequest program information
- Stewardship Team/Stewardship Program Information
- Online Giving Information including any recent reports on use of online giving
- Capital Campaign information if applicable
- Complete the Financial Strength Assessment Form

Reflecting on the Church's Financial Health

Responses should be captured on large paper [or computer white board](#) and collated. This should take 30 to 45 minutes.

Following a conversation, a report should be completed and incorporated into the final Report.

Provide the session members with the information listed above. A brief presentation on the information might be very helpful. Also if possible provide the information ahead of time so session members can familiarize themselves with it.

The Road to Financial Health

Endowments and Major Gifts – What is our Endowment Program? What are some action steps to start a program or to improve it?

Financial Leadership – Who is our team for stewardship? What resources do they need?

Participation and Online Giving – How do we provide opportunities for giving? Do we take into consideration generational differences in giving? How can we encourage online giving?

Source of Funds – What are our sources of funds? What do we need to do to ensure a mix of funding sources?

Planning – What is our stewardship plan? What steps do we need to take to improve our stewardship plan? How do we educate all generations about stewardship?

Preaching and Communication – How are we communicating stewardship? What are some steps to improve our communication?

Capital Campaigns – How are funding capital improvements? What conversations do we need to have about capital needs and financial resources?

Deficits and Debts -Do we have balance in our debt repayment and our ministry needs?

Bequests and Planned Giving – Are we prepared for receiving Bequests? What is our planned giving program?

Giving Emphasis by age group – What areas need our attention.

Your Church and Its Peers – What do we learn from this section? What is our long-term financial plan? What steps can we take to move toward a long-term financial health?

NEXT STEPS

What are our first steps on the Road to Financial Health?

What are some action steps that need to be taken immediately or in the future?

The following resources can be found on”

Presbytery Foundation Website - <https://www.presbyterianfoundation.org/>

Presbyterian Investment and Loan Program - <https://pilp.pcusa.org/>

New Covenant Trust - <https://newcovenanttrust.com/>

Ministry Relations Officer – Presbyterian Foundation
<https://www.presbyterianfoundation.org/ministry-relations-officers/>

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Resources for Endowment Programs

Planned Giving Navigator

Endow Your Pledge Program Guide for Pastors

Endow Your Pledge Program Guide for Donors

Resources for Stewardship Leadership and Stewardship Program

Stewardship Manual

Stewardship Navigator

Stewardship Kaleidoscope

Resources for Online Giving

Presbyterian Foundation Online Giving Program

Online Giving FAQ

Resources for Source of Funds

Financial Leadership Academy

New Covenant Trust

Resources for Stewardship Planning

Annual Stewardship and Generosity

Resources for Preaching and Communication

Preaching Stewardship

Stewardship Navigator

Resources Capital Campaigns

Capital Campaigns

Presbyterian and Investment Loan Program (PILP)

Resources Deficits and Debts

Capital Campaigns

Presbyterian and Investment Loan Program

Resources Bequests and Planned Giving

*Planned Giving resources
Planned Giving Navigator
Wills and Legacy Giving*

Example of Financial Health Assessment Action Steps Report

On the fourth Monday in April, the Session of the Happy Church in the Village reviewed the Foundations Financial Health Assessment report. The session had a conversation about each section and brainstormed ideas and set down some next steps to becoming a financially healthier congregation.



EXAMPLE REPORT **The Road to Financial Health**

Endowments and Major Gifts – What is our Endowment Program? What are some action steps to start a program or to improve it?

We got a yellow on Endowment and major gifts. We haven't had a review of our rather thin endowment Fund in some time.

Action steps: Bob and Wilma will review the Foundation information about Endowment Program and report to the session in two months.

Action Step: The finance team will put together an historical view of our Endowment program.

Financial Leadership – Who is our team for stewardship? What resources do they need?

We got a green for our Stewardship. Desmond and Jane are doing a great job of year-round stewardship and have plans already for the next campaign.

No action steps are needed at this time.

Participation and Online Giving – How do we provide opportunities for giving? Do we take in consideration generational differences in giving? How can we encourage online giving?

We got a red for online giving. Even with the Pandemic we couldn't quite get this up and running.

Action step: Keith will work with the bookkeeper to get an online option on our webpage. This will be done before the next session meeting.

Source of Funds – What are our sources of funds? What do we need to do to ensure a mix of funding sources?

We got a red on this one. We don't really have any idea what to do.

Action step: Keith is going to contact the presbytery office for some resourcing on this.

Planning – What is our stewardship plan? What steps do we need to take to improve our stewardship plan? How do we educate all generations about stewardship?

Another green. Again, good job to Desmond and Jane.

Preaching and Communication – How are we communicating stewardship? What are some steps to improve our communication?

Yellow on this. We need to have more info in the newsletter.

Action plan: Bob is going to review the information on the Foundation page and report next session meeting.

Capital Campaigns – How are funding capital improvements? What conversations do we need to have about capital needs and financial resources?

Yellow on this. We do have some capital improvements needed.

Action Plan: Contact the Property and Insurance team of the Presbytery and see if they can provide guidance. Joann said she would follow and report back in two months.

Deficits and Debts -Do we have balance on our debt repayment and our ministry needs?

Green on this. We don't have debt.

Bequests and Planned Giving – Are we prepared for receiving Bequests? What is our planned giving program?

Yellow on this. This got a lot of discussion from the session members.

Action plan: Set a planned giving program to being in one year. Invite the Presbytery Foundation Ministry Relations officer here this year to talk to us about how to do this properly. The Pastor will follow up on this.

Giving Emphasis by age group – What areas need our attention.

Yellow on this – The discussion felt this related to communication. We will revisit this after we work on communication.

Your Church and Its Peers – What do we learn from this section? What is our long-term financial plan? What steps can we take to move toward a long-term financial health?

Yellow on this: We will revisit this after we have worked on other areas.

Overall

We have some work to do. For our financial long-range health, we do need to take some significant steps. Short term health is stable and somewhat healthy.



What next?

Action Steps from the Report

Purpose: To plan and outline the action steps that could bring the Vocation and vision to reality.

Participants: Session members, church leaders, pastor

When: This should be done after the 3rd Retreat and leaders have had a time to reflect and to invite others to participate.

Instructions:

The Discernment process is meant to ask the questions "What is God up to in the life of this congregation?", "Where is God calling us to ministry?"

Hopefully, some positive energy has been generated around this process. Now is the time to develop some plans to move forward using that energy and vision.

Do an overview of the Vocation statement and the Visioning statements.

Take time to reflect on the following questions

- Where is God calling the congregation into action in their neighborhood?
- If there are too many options, which option (s) resonate with the group. Narrow down to a one or a few options.
- What can be some first steps to explore the options?
- Who will take those first steps? When will they report to session or a committee or team? What resources will they need?

What are some Action Steps to move the vocation and vision forward?

Action Steps Format

- Be specific about how each is going to happen.
- Set timeline for steps that need to happen
- List who is going to do the steps. How will you recruit others to join in?
- Set realistic goals and steps.
- Plan for a 3 month and 6-month review and reflection on how things are going.

- Plan for ways to celebrate the goals.
- Write up the plan and include it in the Discernment Report.
- Use The Smart Plan worksheet to assist in implementation

How many action steps should there be?

You should already have some listed from the Visioning for the Future and the Financial Health Assessment. Start there and refine those Action Steps. Does something else emerge. Maybe there were some concerns during the storytelling season about Worship or church school or something else. This would be the time to review and reflect on those things that did not get addressed during the other events. In the end the Actions Steps need to be doable but stretching the leadership at the same time, along with time sensitive and open ended to add additional steps as needed to keep the vision moving forward. Do not make the actions steps so unobtainable or numerous that everyone will be discouraged or overwhelmed.

Planning the Completion of the Congregational Discernment Process Report

As a group decide who will collate/edit and/or write each of the sections for the Congregational Discernment Process Report. This can be started before the final events but cannot be completed until the Action steps event is completed.

Purpose: To write the final chapters of the discernment process

Participants: Members of the Discernment team probably should write up the final report. Others maybe recruited. Invite your best "editor" to give it the final review and edit.

What are the Chapters that have to included?

Chapter 1 – The Process

A one page or less description of the process

Chapter 2 – Our Timeline

A one- or two-page summary of the Timeline event.

- What did we learn? What are Biblical Stories or Metaphors about our history that can be used in our future?
- A picture or two from the event could be included.

Chapter 3 – Who are the People in our Neighborhood – The Demographic report

One- or two-page summary of the Demographic report.

- DO NOT include the entire Demographic report. Summary is fine.
 - What did we learn from our "drive/walk around"?
 - Summarize what has been learned from the demographics

Chapter 4 – Story telling Season

- One- or two-page Summary of Storytelling Season Events:
 - What did we learn and hear from the Storytelling season?

Chapter 5 – Where is God Calling us

- One page or less summary of the learnings from the Discernment process
- A summary of the conversation on the emerging needs of the community/neighborhood

Chapter 6 – What is our Vocation, our Vision, and our Future stories and how are we going to get there?

- Write up your Vocation Statement(s), Vision and Action plans. (an example of what these could look like is included)

Chapter 7 – Other Stuff

- Financial Health conversation – You do not need to include the Foundation Printed financial health assessment report.
- PCUSA Congregational Statistics report
 - Include the Congregational Statistical Report for your congregation that can be found at <https://church-trends.pcusa.org/>

NEXT STEPS WORKSHEET FOR RETREAT #3

Who will facilitate or lead the following:

- Financial Health Report
- Action Steps Event – Session and Discernment Team
- Writing the final Report - Discernment Team
- Final steps for the Final Report – Discernment Team and Session

Dates for Work to be Completed

- Financial Health Report
- Action Steps Event
- Writing the Final Report
- Final steps for the Final Report

Meeting with the Church Development Team – Date?

Date for Session Final approval