



# **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE (MCPC)**

## **HANDBOOK**



**At the March 17, 2026 meeting of the Ministry of Congregational and Pastoral Care (MCPC),  
a pattern of regular review was established. From this date forward,  
various portions of this document will come under review as follows:**

**MCPC Handbook** (minus items listed below) – Annually

**Grants** – Annually

**Policy: Protection of Minors and Vulnerable Adults** – Odd years

**Policy: Sexual Abuse and Misconduct** – Odd years

**Policy: Workplace and Sexual Harassment** – Odd years

**Policy: Antiracism** – Even years

**Policy: Reconciliation or Separation of Congregations** – Even years

**Terms of Call / Contracts** – Annually,

based primarily on

changes in the Book of Order,

Presbytery minimum, and Board of Pensions costs

The results of these reviews will be reported annually to the Presbytery, in full,  
with changes presented for approval accordingly.

A cumulative Revisions Page will be added to the Handbook, beginning with the 2027 review,  
to provide users with a record of changes per review.

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# **Presbytery of Florida**

## **Ministry of Congregational and Pastoral Care**

### **OVERVIEW**

#### **Purpose**

The Ministry of Congregational and Pastoral Care (MCPC) is charged with fulfilling all *Book of Order* and Presbytery Manual responsibilities related to oversight of and assistance to churches, ministers of Word and Sacrament, commissioned ruling elders (CREs), authorized ruling elders (AREs), and certified Christian educators in their ministry. These responsibilities include all matters related to the orientation of new pastors, periodic contacts with clerks of sessions and pastors, support for clergy wellness and continuing education, and the empowerment of congregations to be centers of mission.

#### **Terminology**

Unless more-specific language is required, CREs, stated supply pastors, and ministers of Word and Sacrament will be collectively referenced throughout this document as “pastor.”

#### **Ministry Membership Composition**

The membership of this Ministry Team shall be comprised of a minimum of six (6) persons recruited by the Ministry of Representation with persons from each of the three regions of the Presbytery, as well as a representative mix of ruling elders and pastors. Others may be recruited by Ministry Team members with the approval of the Ministry Coordinating Council (MCC) and/or the Presbytery.

#### **Responsibilities and Authority**

1. Coordinate with each Regional Advocate regarding each congregation’s pastor and session in the Presbytery.
2. Provide pastoral care to pastors, Christian Educators, and their families during times of personal, family, and professional challenges, drawing on all available resources; training and assigning Pastoral Response Teams to do so when needed, with limited, situationally appropriate oversight.
3. Maintain periodic contact with ordained PCUSA ministers of Word and Sacrament who are serving in validated ministries within the Presbytery or serving outside the bounds of the Presbytery, are retired, or are otherwise not currently serving a congregation in the Presbytery.
4. Welcome and provide an orientation for Ministers of Word and Sacrament and Christian Educators new to the Presbytery of Florida and assign a Colleague in Ministry for the first year of service.
5. Appoint a Mentor for each Commissioned Ruling Elder (CRE).
6. Provide a moderator for a single session meeting when the pastor or other designated moderator is temporarily unavailable or for special purposes and meetings.
7. Recommend initiatives to enhance wellness for ministers of Word and Sacrament and Christian educators which include resources and support for sabbaticals, continuing education, and use of career counseling centers.
8. Receive retirement requests from ministers of Word and Sacrament and certified Christian Educators and plan an appropriate recognition at a Presbytery meeting.
9. Oversee the various boundary policies for the Presbytery, as required by the Book of Order, and partner with the Ministry of Leadership Development for the required training.
10. Review and recommend to the Presbytery the annual minimum requirements (G-2.0804) and apprise the body of changes being made by the Board of Pensions and General Assembly (G-2.0804).

11. Review and approve the annual Terms of Call for ministers of Word and Sacrament, and the annual covenants and contracts for CREs, stated supply pastors, and certified Christian educators; and counsel with sessions, congregations, or other responsible entities in cases where Presbytery minimum compensation requirements are not met.
12. Receive annual contracts for parish associates and ministers of Word and Sacrament serving in a validated ministry outside the congregational setting.
13. In consultation with the Stated Clerk of Presbytery, review annually sessional records according to G-3.0108 and recommend action to address whatever a church has done contrary to order.
14. Coordinate the annual Presbytery necrology, submitting the list to the Stated Clerk for reading during worship at the fall Presbytery meeting.
15. Consider and act on requests for exemptions that ruling elders and deacons be elected for limited terms of active service (G-2.0404).
16. Review and act on requests for encumbering church property through loans by Presbyterian Investment and Loan Program (PILP) or commercial lending institutions.
17. Provide awareness of and access to high-quality resources for worship, congregational, and pastoral health.
18. Oversee the Presbytery grants that fall under the jurisdiction of this Ministry.
19. Assist congregations with discerning their future and legacy specific to their communities as needed.
20. Provide an Administrative Commission (AC) within the bounds of MCPC's authority, as needed and with or without original jurisdiction as appropriate, to assist churches and church leadership (G-3.0109).
21. Support and counsel pastors, sessions, certified Christian educators, and /or congregations when conflict or dissension has arisen.
22. Accept and act upon congregational requests for dissolution of a pastoral relationship (G-2.0901) and notify the Ministry of Pastoral Transitions for further guidance.
23. Train, oversee, and engage a Presbytery Engagement Team to work with congregations expressing interest in withdrawing from the denomination.

## **PASTORAL CARE AND SUPPORT**

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Titles for Temporary Pastoral Relationships**

To help clarify titles for pastors in temporary and short-term pastoral relationships, the Presbytery of Florida adopted the following titles:

- Interim Pastor – for up to 36 months and renewable
- Interim Associate Pastor – for up to 36 months and renewable
- Interim General Presbyter – for up to 36 months and renewable
- Stated Supply Pastor – for up to 36 months and renewable
- Designated Pastor – installed for a designated period of time of up to 3 years without possibility of renewal or extension; may become the fully installed pastor.

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Regional Advocates**

Regional Advocates assigned to each of the Presbytery's three regions develop strong relationships with congregations and with pastoral leaders, sessions, and certified Christian educators within their respective regions. They attend worship periodically and maintain contact with Presbytery's retired members and members-at-large. Regional Advocates' relationships support and strengthen MCPC's work by building healthy relationships and strong communication between local congregations/ministries and the Presbytery. They are accountable to the Equipping Presbyter/Stated Clerk, and ultimately, to the Presbytery of Florida through the Ministry Coordinating Council (MCC).

Regional Advocates, selected for a specific term of service, are ordained ruling elders, teaching elders, or deacons who exhibit a strong and growing faith. They are skilled at working with all kinds of people, communicating proactively and confidently, and operating with integrity and compassion. Their interface with MCPC is especially important for circumstances involving conflict, strong personalities, and unequal power dynamics. When appropriate, they may be asked to provide a report to MCPC to supplement the Ministry Team's awareness of a particular situation. It is understood that, as leaders able to build trust and honor confidentiality, they will be circumspect in their reporting and advocacy, discerning how much and what kind of information is appropriate to share.

Following are the specific ways in which Regional Advocates function in support of MCPC and other ministry teams in the Presbytery:

- Advocate for the health, well-being, and success of pastors, congregations, certified Christian educators and program staff, and validated, non-congregational ministries.
- Network via Zoom with the Presbytery's other Regional Advocates and the Equipping Presbyter/Stated Clerk at scheduled intervals each month (and as needed) regarding congregational and pastoral concerns and needs, living into the connectionalism of the Presbyterian Church (USA).
- Communicate effectively to promote, Presbytery-wide, the programs, policies, and actions of the Presbytery, the Synod of South Atlantic, and the General Assembly.
- Help connect Presbytery leaders to available resources, opportunities, and required responsibilities that advance the strategic plan of the Presbytery.
- Identify and equip/empower potential leaders for service in the Presbytery and other councils of the PCUSA.
- Support and liaise with pastoral leadership in the region, including ensuring provision of an orientation session and materials for those new to this Presbytery.
- Be a frequent physical presence in local congregations and other validated, non-congregational ministries.
- Encourage fellowship and study among pastoral/church leadership in the region.
- Identify conflictual situations at their earliest stages; discern the level of need through one or more in-person visits, phone calls, emails, and/or texts; and, in consultation with the moderator of MCPC and the Equipping Presbyter/Stated Clerk, suggest the need for a Pastoral Care Team or other appropriate care and provide follow-up
- Participate in Presbytery meetings and events.
- Lead or assist with officer training in the region.

# **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

## **Welcoming Ministers of Word and Sacrament and Certified Christian Educators**

Ministers of Word and Sacrament and certified Christian educators new to this Presbytery are to be provided an orientation to the Presbytery. This orientation shall be scheduled by the Regional Advocate, in partnership with the Ministry of Congregational and Pastoral Care (MCPC), between four (4) and eight (8) weeks after an individual has begun work. A Colleague in Ministry assigned by the MCPC will be invited to attend, as well. Spouses/partners should be encouraged to attend the orientation.

The orientation will take into consideration the following concerns:

- Introduction of Presbytery Staff, if able to attend in person or via Zoom
- Resources to present
  - Pastor and Church Directories
  - Map of the Presbytery
  - Map of the Synod
  - Presbytery Bylaws
  - Presbytery Manual of Operations
  - Boundary policies
  - Minutes of one or more recent Presbytery meetings
  - Dates and locations of future Presbytery meetings
- Explain the purpose of Colleagues in Ministry
- Talk about community, customs, and culture of the area
- Discuss:
  - Differences from previous living and serving area
  - Sharing of concerns/joys regarding the move
  - Expectations as understood
  - Other items which may surface during discussion, as needed

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## **Pastoral and Financial Resources for Pastors, Certified Christian Educators, and Their Families**

Life sometimes throws us curves and extra assistance is needed. The Ministry of Congregational and Pastoral Care (MCPC) will assist our pastors (serving congregations, validated non-parish ministries, members-at-large, or retired), certified Christian educators, and their families during times of challenge.

Once a need is discerned via phone call, email, or text, the Regional Advocate, MCPC moderator, or Equipping Presbyterian/Stated Clerk will make contact with the person to determine the level and type of assistance needed. The Advocate will provide pastoral care and guidance in finding the appropriate agency to aid the situation.

The Advocate or moderator will regularly follow up during the process to ascertain and address the emotional stresses encountered. Should the matter cause a conflict for the Advocate or moderator, or if the Advocate or moderator feels ill-equipped to handle the matter, the moderator of MCPC will be notified and another Advocate or MCPC Team member will be assigned to provide assistance.

### **Resources**

The Board of Pensions provides resources for various types of assistance.

[Adoption Assistance](#), [Emergency Assistance](#), [Housing Supplements](#) for retirees, [Income Supplements](#) for retirees, [Retiree Medical Grants](#), [Minister Debt Relief](#), [Minister Educational Debt Assistance](#), [Clergy Wellness Support](#), [Sabbath Sabbatical Support](#), Tax Guides for Ministers, Mental Health Resources, and more.

Go to [Pensions.org](https://www.pensions.org) for specific information regarding eligibility and other supportive details.

The Presbyterian Church (U.S.A.) provides many good resources as well, such as: Fair Labor Standards Act - 2016 Updates, Estates and Planned Giving Guide, Federal Tax Issues - PC(USA) Legal Guidance, Legal Issues Involving Ownership of Pastors' Sermons, Books, etc.

Go to [PCUSA.org](https://www.pcusa.org) and click on Resources.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Care for Pastors Serving Validated Non-Parish Ministries

To provide care ministers of Word and Sacrament serving in validated ministries outside the congregational setting, the Ministry of Congregational and Pastoral Care (MCPC) will assign a Colleague in Ministry to support and encourage these ministers in their field of service.

When a minister of Word and Sacrament is serving in a validated ministry within the bounds of the Presbytery, an in-person contact is the best approach for fostering a collegial relationship and giving support. Other periodic contacts via telephone, email, or text are also appropriate.

Whereas some ministers are serving in the military and may be serving in different parts of the world, making contact may be difficult. However, an attempt to make contact via telephone or email should be made at least twice per year.

Expectations for Colleagues in Ministry:

1. Pray for the colleague.
2. For those serving within the bounds of the Presbytery, touch base at least quarterly, with a minimum of one in-person visit per year.
3. For those serving in the US Military, touch base at least twice per year by phone or email.
4. Offer words of encouragement.
5. Be prepared to discuss latest developments in the Board of Pensions, changes to the Book of Order, and any other pertinent information from the denomination or Presbytery.

The minister of Word and Sacrament in such ministry should feel free to call on her/his assigned colleague-in-ministry or Presbytery Staff.

Please note: If, for any reason, the relationship just does not “click,” another person may be requested by either party.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Colleagues in Ministry for New Pastors and Certified Christian Educators

To help newly-installed ministers of Word and Sacrament and certified Christian educators acclimate to life and ministry in the Presbytery, the MCPC will assign a Colleague in Ministry to aid in the first year of service to the new congregation. There are significant benefits for new pastors/educators in having a designated pastor/educator-colleague who is prepared to be a “helping hand” as questions and concerns arise.

For newly-ordained pastors, a first-call community for first-call ministers and church musicians is available through the Presbyterian Association of Musicians (PAM), an organization closely associated with the PCUSA. More information is available at <https://www.presbymusic.org/fcc>.

Expectations for Colleagues in Ministry:

1. Be a friend and colleague, meeting regularly to touch base in a relaxed manner.
2. Encourage development of a support group. The PNC that extended the call is encouraged to remain in place during the pastor’s first year to check in periodically, both formally and informally.
3. Help introduce the new pastor/Christian educator to the community and to other pastors in the area.
4. Provide helpful contact information, reviewing orientation materials and other valuable resources.
5. Pray for the colleague.

It is expected that this relationship will continue for a year. However, if this relationship grows into a mutually healthy and beneficial one, it is hoped it will continue well beyond this period. Please note: If, for any reason, the relationship just does not “click,” another person may be requested by either party.

The new pastor or Christian educator should feel free to call on her/his assigned colleague-in-ministry or Presbytery Staff.

# **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

## **Mentors for Commissioned Ruling Elders (CREs)**

When an elder is certified as being ready to serve a congregation through a commissioning, the Commissioned Ruling Elder (CRE) becomes accountable to the Presbytery through a minister of Word and Sacrament assigned as a mentor, pastor, and supervisor. Since CREs are generally expected to carry out the same pastoral functions as a minister of Word and Sacrament without the benefit of a fully-degreed theological education, they can benefit from being in the care of a designated minister who has additional education and experience. The mentor is appointed for one year, at minimum, and is selected by MCPC from among the recommendation(s) submitted by the CRE (excluding the CRE's home pastor).

### **Expectation of a Mentor:**

- Be a good role model for the CRE.
- Demonstrate the openness and caring that the CRE should develop.
- Remain a minister member of the Presbytery of Florida.
- Be accessible for meetings and phone conversations.
- Be approachable and non-judgmental, listening before giving advice, and presenting feedback in a positive way.
- Ask for a recorded sermon quarterly in the first year (less often in ensuing years) and provide feedback to the CRE.
- Encourage the CRE to pursue continuing education and his or her own personal growth.
- Report to MCPC at least twice a year.
- It is strongly recommended that mentors should have responsibility for only one CRE.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Moderators for Emergencies and Special Conditions

The Book of Order states in G-1.0505: “The installed pastor shall ordinarily moderate all meetings of the congregation. If it is impractical for the pastor to preside, he or she shall invite another minister of Word and Sacrament who is a member of the Presbytery or a person authorized by the Presbytery to serve as moderator. **If there is no installed pastor, or the installed pastor is unable to moderate and/or to name another moderator, the Presbytery shall make provision for a moderator.**” (emphasis added)

Occasions arise when a pastor is unable to moderate or find another person to moderate a session or congregational meeting. MCPC will maintain a list of persons qualified to moderate a session or congregational meeting should the occasion arise.

The pastor of the congregation, or the clerk of session if there is no pastor, will contact the moderator of MCPC to explain the need for someone to moderate a meeting of the session or the congregation. The anticipated date and time of the meeting will be shared.

The moderator of MCPC or his/her designee will contact a person on the list of available persons to moderate and will appoint one who agrees to serve.

The moderator of MCPC will be granted authority to appoint moderators for such occasions and will report to MCPC this action at its next meeting.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Pastoral Response Team

A Presbytery Pastoral Response Team (PRT) shall be established to ensure that a caring response is provided during times of crisis in the life of a congregation. The PRT shall be responsible to all persons who are affected by the crisis. The PRT's responsibilities include needs assessment, and the identification and coordination of resources. The PRT holds no judicial authority and shall not serve in that capacity. Members of the PRT shall not serve concurrently on the Permanent Judicial Commission.

### 1. Composition of the Pastoral Response Team

The PRT shall consist of five (5) to seven (7) persons, diverse as to gender and reflective, to the extent possible, of the ethnic background of both the accuser/victim and the accused. The membership shall, to the extent possible, reflect professional expertise and/or extensive experience in one or more of the following areas:

- a. Psychological counseling, with particular experience in the area of sexual abuse and its aftermath
- b. Pastoral care
- c. Child advocacy
- d. Conflict management and resolution, particularly in the religious community setting

All members of the PRT shall be members of the Presbyterian Church (U.S.A.) and familiar with its policies and procedures, particularly in the area of sexual abuse. Members of a specific team shall not be members of the congregation in which an allegation arises. Presbytery staff members shall not serve on the PRT.

### 2. Sources of Members for the Pastoral Response Team

The Ministry of Congregational and Pastoral Care (MCPC) shall maintain a list of persons who meet the above qualifications and who are willing to serve, as needed. Members shall serve no fewer than three years in staggered terms and will be oriented to these guidelines by the MCPC. When a PRT is needed, it shall be appointed from the list by the moderator of MCPC within five days of the notification. The members of each specific PRT shall elect their own coordinator. Administrative costs for the PRT shall be borne by the Presbytery.

### 3. Tasks of the Pastoral Response Team

The primary task of the PRT is to ensure, insofar as it is possible, that competent pastoral care is offered to all persons involved when there is an allegation of harm or other conflict. Ordinarily, that would involve oversight and referral by the PRT. Other tasks may include an ongoing needs assessment, and the identification and coordination of resources.

### 4. Provision of Intensive Pastoral Care

It is the general understanding of the Presbytery that provision for intensive pastoral care in these situations is best rendered by someone relatively distant from the situation and by someone who, by reason of training and experience, is competent to deal with the complexities of such situations. If persons involved in an instance of alleged sexual abuse are insistent that the local pastor is the one to offer intensive pastoral care or if the local pastor is insistent that the provision of such pastoral care is his/her prerogative, the PRT will take care to monitor the situation. In such cases, the local pastor should have ongoing and regular supervision of his/her work by a professional recognized by the Board of Pensions as competent to offer psychotherapy to members of the Benefits Plan (i.e., a

psychiatrist, clinical psychologist, clinical social worker, or the Association of Clinical Pastoral Counseling).

**5. Tenure of the Pastoral Response Team**

An incident-specific PRT will disband on its own initiative when, in its judgment, the need for its care is ended; and will inform the MCPC accordingly. If, in the judgment of the PRT, its continued existence is necessary beyond six (6) months, the PRT will petition the MCPC for an extension of up to an additional six (6) months.

**6. Media Contact with the Pastoral Response Team**

Questions from the media shall not be addressed by any member of the PRT. All inquiries from the media regarding an incident are to be directed to a designated official of the Presbytery, normally the Equipping Presbyter/Stated Clerk.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Sabbatical Guidelines for Pastors and Certified Christian Educators

### **Purpose:**

The purpose of a sabbatical is to provide an opportunity for full-time pastors and certified Christian educators serving churches full time within the Presbytery to spend up to three months free from the demands of the congregation. The time away may be spent in study directed toward increasing vocational skills, or in reflection, prayer, and meditation, to gain deeper insight into one's spiritual life and ministry.

### **Rationale:**

While not mandatory, it is highly recommended that churches support their pastor's need or desire to take a sabbatical. As Jesus demonstrated in his life, there is a human need to withdraw from the routine and demands of ministry for periods of refreshment and renewal. Such times away enable pastors and certified Christian educators to experience personal and professional renewal and spiritual growth.

### **Plan:**

It is expected that pastors and certified Christian educators will use one year's allotted weeks of vacation and one year's continuing education (minimum 2 weeks), along with six to eight additional weeks granted by the congregation's session to become refreshed for ministry in body, mind, and spirit. The vocational functions of ministers of Word and Sacrament and certified Christian educators during this three-month period will be undertaken by the session, and may involve securing additional provision for leadership and pastoral care. Assistance from MCPC is available to find temporary leadership, if needed (see #5 below, under Process).

### **Process:**

1. To qualify, pastors and certified Christian educators will have completed at least seven years of full-time, continuous service to their congregation and will agree to continue for a minimum of one additional year after completion of the sabbatical.
2. A proposal will be submitted in writing for approval by the session at least six months in advance of beginning the sabbatical. The proposal will include a request for the sabbatical and will outline its intended purpose. A copy of the approved proposal will be forwarded to MCPC for information.
3. A written report will be submitted to the session within one month of returning from the sabbatical, and an informal face-to-face reflection with the session will take place within three months.
4. The session will continue to pay salary and benefits for the individual during the sabbatical.
5. MCPC can assist the session in securing a 16-hour per week pastor, or someone to assume the duties of the certified Christian educator, preferably from within the Presbytery. The session shall approve and provide remuneration for those services.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Retirement and Support

There comes a time when a person's other interests, longevity in life, or failing health determines that retirement is the next step in the process of a life dedicated to service in the Church. To aid pastors and certified Christian educators in this process, the MCPC will provide guidance.

### Contact Within the Presbytery

- When a retirement date has been selected, contact the Equipping Presbyter/Stated Clerk 6-12 months in advance with the anticipated date of retirement. This will be held in confidence.
- Following that contact, immediately reach out to the moderator of the Ministry of Pastoral Transitions (MPT) to convey the anticipated date of your retirement so early protocols and training can be put in place for use as soon as the retirement date has been announced to the session and congregation. This will be held in confidence until that time.
- These two contacts will help with the preparation for the process that will be followed once the planned retirement date has been announced to the congregation.

### Contact the Board of Pensions

- Approximately 3-4 months prior to the start of retirement, the Board of Pensions is to be contacted by the retiring person to request a Retirement Application. Pre-retirees will be assisted with key considerations, resources, and options. (800-PRESPLAN [1-800-773-7752]).

### Contact Social Security

- The retiring person needs to set up a personal Social Security account by this point if not done already.
- Four months before receiving Social Security Benefits (if enrolled in Social Security), the retiring person needs to access [SSA.Gov/retirement/timing-first-payment](https://www.ssa.gov/retirement/timing-first-payment) for instructions on establishing payment methods.

### Informing the Congregation

- The Ministry of Pastoral Transitions will provide guidance and process for making this happen. Contact the moderator of MPT as noted above.

### Ongoing Care from MCPC

- Regional Advocates shall contact persons in retirement on a regular basis.
- The purpose is to maintain contact for pastoral care and assistance through life's transitions.
- The Regional Advocate will report confidentially to MCPC any needs that may arise to determine whether MCPC can provide guidance or assistance.

# **NON-PARISH VALIDATED MINISTRIES**

## **POLICY FOR CONSIDERATION OF NON-PARISH VALIDATED MINISTRIES**

The Presbytery of Florida is called to serve God using our gifts and skills to excite, encourage, equip, and empower our congregations and clergy in ministry and mission. To fulfill our mission, the Presbytery has adopted the PCUSA's criteria for determining who will be minister members of presbyteries. Ministers of Word and Sacrament who are members of a presbytery include active members, members-at-large, and inactive members.

It is required that presbyteries shall have a policy for validation of ministries carried on by its active members within the bounds of its presbytery. This policy sets out the standards and procedures by which ministers of Word and Sacrament shall be active members of a presbytery (G-2.0503). Qualification for active membership is based on the ministry in which the member is engaged. Approved ministries are called validated ministries.

Criteria for determining the validation for ministry of active members with the exception of honorably retired ministers, are that the ministry must:

1. demonstrate conformity with the mission of God's people in the world as set forth in Holy Scripture, the Book of Confessions, and the Book of Order of this church;
2. serve and aid others, and enable the ministry of others;
3. give evidence of theologically informed fidelity to God's Word;
4. be carried on in accountability for its character and conduct to the presbytery in addition to any organizations, agencies, and institutions served; and
5. include responsible participation in the deliberations, worship, and work of the presbytery and in the life of a congregation of this church or a church in correspondence with the PC(USA) (G-5.0201).

### **Application Process**

If a member who is not honorably retired cannot meet one or more of the criteria, he or she may request to be designated a member-at-large of presbytery (G-2.0503 b).

A minister of Word and Sacrament who wishes to engage in a validated ministry shall contact the moderator of MCPC. A copy of this policy statement shall be sent to the applicant with a request for a written explanation (see Supplement: Other Forms) of how the proposed ministry meets the criteria, responding to the five qualifications above. The response will be returned to the moderator of MCPC and reviewed at its next stated meeting. After the application is reviewed, the applicant shall be interviewed by MCPC for either approval or disapproval. This action will be reported to Presbytery through the MCPC report.

If MCPC declines to validate a specialized (non-parish) ministry, the applicant may appeal to the Ministry Coordinating Council (MCC), and, if necessary, to the Presbytery as a whole. If denied by Presbytery, the person may engage the judicial process.

If one receives approval for a particular validated (non-parish) ministry, one may not take up a different specialized ministry without approval of Presbytery through MCPC. Validation is attached to particular work and not to the individual.

### **Reporting**

In accordance with G-2.0503a, any minister of Word and Sacrament actively involved in a validated ministry is required to make an annual report to MCPC. The reporting form will be available on the Presbytery's website for download (See Supplement: Other Forms). This report is to be completed and returned to the moderator of MCPC by the yearly anniversary date of the onset of the ministry.

### **Types of Ministries for Consideration**

Consideration of forms of ministry that Presbytery should address are mission projects; schools; chaplaincies; pastoral care and counseling; education services; healthcare facilities and services; governing bodies; agencies; mission and ministry units; seminaries; academics in religion; international organizations; programs dealing with housing; programs dealing with drug and alcohol addiction, and; marriage and family counseling. In all instances, the qualifications should include work that provides opportunities to articulate the Christian faith.

# **ANNUAL REVIEWS**

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Presbytery Minimum Requirements and Changes**

In accordance with the constitutional requirements of the Presbyterian Church (U.S.A.) in G-2.0804, the terms of call for installed ministers of Word and Sacrament must meet or exceed the minimum requirements set by the Presbytery. The minimum cash salary for churches within the Presbytery of Florida is approved annually for the upcoming year at the October stated meeting, shown on all terms of call forms and pastoral contracts, and posted on the Presbytery website. The minimum set by the Presbytery is increased at least 2% each year over the previous year.

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Review and Approval of Terms of Call: Ministers of Word and Sacrament in Congregational Settings**

In addition to meeting or exceeding the minimum requirements of the Presbytery of Florida, the session must review and document annually the minister's terms of call and propose them to the congregation for approval. The terms of call shall include provision for a minimum of twelve weeks paid family medical leave and participation in the benefits plan of the Presbyterian Church (U.S.A.), including both pension and medical coverage, or any successor plan approved by the General Assembly (*G-2.0804*).

The terms of call approved by the congregation shall be submitted to the Ministry of Congregational and Pastoral Care (MCPC) no later than March 31. MCPC will review the terms to ensure that they meet the Presbytery minimum and all constitutional requirements. If there are issues that need to be addressed, a representative from MCPC will contact the minister and clerk of session. Congregations are advised that the Presbytery takes seriously the fair compensation of ministers and is committed to finding ways to assist congregations in meeting fair compensation standards.

Terms of call shall be submitted to MCPC annually, even if the terms have not changed from the previous year. If the housing allowance has been changed from the previous year, the housing allowance resolution shall be entered into the session minutes and submitted with the Terms of Call. *These forms may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Review and Approval of Terms of Call: Designated Ministers of Word and Sacrament in Congregational Settings**

Pastors called to serve for a designated period of time are called by the congregation. Terms of call are treated in the same way as a pastor called for continuous service, but must be limited to no more than three (3) years (non-renewable).

In addition to meeting or exceeding the minimum requirements of the Presbytery of Florida, the session must review and document annually the designated minister's terms of call and propose them to the congregation for approval. The terms of call shall include provision for a minimum of twelve weeks paid family medical leave and participation in the benefits plan of the Presbyterian Church (U.S.A.), including both pension and medical coverage, or any successor plan approved by the General Assembly (G-2.0804).

The terms of call shall be submitted to the Ministry of Congregational and Pastoral Care (MCPC) no later than March 31. MCPC will review the terms to ensure that they meet the Presbytery minimum and all constitutional requirements. If there are issues that need to be addressed, a representative from MCPC will contact the minister and clerk of session. Congregations are advised that the Presbytery takes seriously the fair compensation of ministers and is committed to finding ways to assist congregations in meeting fair compensation standards.

Terms of call shall be submitted to MCPC annually, even if the terms have not changed from the previous year. If the housing allowance has been changed from the previous year, the housing allowance resolution shall be entered into the session minutes and submitted with the Terms of Call. *This form resides with the Ministry of Pastoral Transitions (MPT) and may be found in fillable format on the Presbytery website.*

## MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

### **Review and Approval of Contracts: Commissioned Ruling Elders (CREs)**

Two months before the expiration of a CRE contract, the Ministry of Congregational and Pastoral Care (MCPC) will contact the CRE, CRE mentor, and session of the church to initiate the process of deciding whether to renew the CRE contract. If the CRE and session agree to renew the contract, the duties and responsibilities of the CRE and session will be reviewed and initialed, and the contract may be extended for up to 36 months (renewable).

The session must also agree to any changes in compensation required by an increase in the Presbytery minimum or by an increase in the number of hours per week required of the CRE. It is recommended that the renewal date of CRE contracts be January 1 to align with the effective date of Presbytery minimum salary increases, to include an annual salary review to meet or exceed the minimum salary increase set by the Presbytery. This salary update shall be included as part of the required annual CRE report and does not affect other contractual details of a multi-year contract. The negotiated, initialed, and signed contract is subject to the approval of MCPC and shall be submitted to the MCPC on or before December 1. *This form may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*

If the CRE and session mutually agree not to renew the contract, the reason(s) why will be documented in the minutes along with the need for alternative pastoral leadership. It shall be the responsibility of the CRE mentor to report the need to MCPC and the subsequent responsibility of the MCPC to work with the session to find appropriate pastoral leadership. If there is disagreement between the CRE and the session as to renewal of the contract or concerning the duties and responsibilities expected of the CRE, the mentor and a designated member of MCPC will schedule a follow-up meeting with the CRE and the clerk of session to determine resolution.

## MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

### Review and Approval of Contracts: Stated Supply Pastors

Two months before the expiration of a stated supply pastor contract, the Ministry of Congregational and Pastoral Care (MCPC) will contact the pastor and clerk of session of the church to initiate the process of deciding whether to renew the stated supply pastor contract. If the stated supply pastor and session agree to renew the contract, the duties and responsibilities of the pastor and session will be reviewed and the contract may be extended up to 36 months (renewable).

The session must also agree to any changes in compensation required by an increase in the Presbytery minimum or by an increase in the number of hours per week required of the pastor. Note: If the stated supply pastor has retired since the initiation of the contract and is drawing Social Security, the *retired stated supply pastor contract* will be used *instead*. It is recommended that the renewal date of stated supply pastor contracts be January 1 to align with the effective date of Presbytery minimum salary increases, to include an annual salary review to meet or exceed the minimum salary increase set by the Presbytery. This salary update shall be included as part of the required annual report and does not affect other contractual details of a multi-year contract. The negotiated and signed contract is subject to the approval of MCPC and shall be submitted to the MCPC on or before December 1. *Both contracts may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*

If the stated supply pastor and session mutually agree not to renew the contract, the reason(s) why will be documented in the minutes along with the need for alternative pastoral leadership and the moderator of the MCPC will be notified immediately. It will be the responsibility of the MCPC to work with the session to find appropriate pastoral leadership. If there is disagreement between the stated supply pastor and the session as to renewal of the contract or concerning the duties and responsibilities expected of the pastor, a designated member of MCPC will schedule a follow-up meeting with the pastor and the clerk of session to determine a resolution.

## MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

### **Review and Approval of Contracts: Certified Christian Educators**

Two months before the renewal date of a certified Christian educator's compensation package, the Ministry of Congregational and Pastoral Care (MCPC) will contact the pastor, educator, and clerk of session or personnel committee of the church to review the certified Christian educator's compensation package. Changes to the compensation package are to be negotiated, agreed upon, and entered into the compensation form for session approval. *This form may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*

The session must approve any changes in compensation, including any required by annual increases in the Presbytery minimum or by an increase in the expanded workload that may be required of the educator. It is recommended that the renewal date of educator contracts be January 1 to align with the effective date of Presbytery minimum salary increases, to include an annual salary review to meet or exceed the minimum salary increase set by the Presbytery. This annual salary update does not affect other contractual details of a multi-year contract.

If there is disagreement between the certified Christian educator and the session regarding the compensation package or the duties and responsibilities expected, a designated member of MCPC will schedule a follow-up meeting with the educator, pastor, and clerk of session to determine a resolution.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Receiving Contracts: Parish Associates

### Information and Guidance

The position of parish associate is a locally defined and approved relationship between pastor, parish associate, and session. The Presbytery recognizes the importance of parish associates in part-time service to a congregation as requested and delineated by the pastor and agreed upon by the parish associate and session.

Although no longer addressed in the *Book of Order*, the following description from previous versions of the constitution may be helpful in guiding pastors and sessions:

*A parish associate is a minister who serves in some validated ministry other than the local parish, or is a member-at-large, or is retired, but who wishes to maintain a relationship with a particular church or churches in keeping with ordination to the ministry of the Word and Sacrament. Such persons, already qualified as continuing members of Presbytery, may serve as parish associates. The relation shall be established, upon nomination by the pastor, between the parish associate, the session, and the Presbytery. The parish associate shall be responsible to the pastor, as head of staff, on an “as needed, as available” basis and with or without remuneration.*

Because the parish associate role is no longer a pastoral designation in our constitution, its parameters are not subject to Presbytery oversight or approval. It shall be the responsibility of pastors and sessions to determine whether their mission and ministry would be enhanced by enlisting the services of a parish associate, and to document approved agreement of services and compensation in their session minutes.

Historically, the *Book of Order* prohibited parish associates from becoming installed pastors or associate pastors in the church served until a six-month period between the end of the parish associate’s service to the church and acceptance of a called and installed position had elapsed. The MCPC supports this prohibition. Further guidance stipulated that the “agreement between the session, the parish associate, and the presbytery shall terminate when the call to the installed pastor is dissolved.” MCPC supports this stipulation, as well.

Copies of agreements developed between pastors, parish associates, and sessions shall be forwarded to MCPC for information, so MCPC is aware of the scope of pastoral leadership provided to the church. The agreement is not subject to MCPC approval.

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Receiving Contracts:**

#### **Ministers of Word and Sacrament in Non-Parish Validated Ministries**

Ministers of Word and Sacrament who serve in validated ministries outside a congregational setting are ultimately under the jurisdiction and care of the Presbytery of Florida. The Ministry of Congregational and Pastoral Care (MCPC) will ensure the Regional Advocate is in contact with ministers in such positions at least twice per year.

Whereas the contractual nature of compensation for serving in a non-parish validated ministry is between the minister and the employing agency, a copy of the completed contract and salary package shall be sent to MCPC for review and filing. While MCPC has no direct say in such matters, MCPC may advocate for a minister member of the Presbytery, should compensation be inadequate for the pastor's survival and care, or a position description be in conflict with the Book of Order and vows of ordination.

# **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

## **YOKED CONGREGATIONS**

### **What Is A Yoked Church?**

A yoked church is one that shares a pastoral leader (minister of Word and Sacrament or CRE) with one or more congregations.

### **Why Do Churches Yoke?**

The most common reason for yoking is that one or more churches can no longer afford to pay a full-time pastor. In other situations, the yoke is a long historic tie. Churches may also choose to yoke under shared leadership to work together in service to their community, or to develop such joint programs as youth groups and Bible studies. When the cooperation is extensive and involves many churches and pastoral leaders, it is a cooperative parish or cooperative ministry.

### **What is a Joint Congregational Witness?**

A Presbyterian Church (U.S.A.) congregation may also choose to enter into a joint witness with another Presbyterian Church (U.S.A.) congregation or a congregation from another Christian church which recognizes Jesus Christ as Lord and Savior, accepts the authority of Scripture, and observes the Sacraments of Baptism and the Lord's Supper. Such an arrangement may be approved by the Presbytery in the interests of ecumenical cooperation if its strategy for mission requires it. Congregations desiring to form a joint witness are subject to the constitutional requirements outlined in G-5.05.

### **How Are Yokes Established?**

The Presbytery may approach one or more churches to suggest yoking as an option for obtaining pastoral leadership. In other situations, churches interested in yoking may approach each other and initiate discussions. The Presbytery will then be invited to assist with developing a formal partnership agreement which outlines how they will share in ministry. A written covenant will then be signed by the clerks of session, the shared pastor, and the moderator of the Ministry of Congregational and Pastoral Care (MCPC). This written covenant will be reviewed annually and amended as appropriate to reflect the scope of the shared ministry.

The following questions are to be considered in forming a yoked ministry:

- What are the needs of each church for the time and talent of the pastor? What will the pastor be expected to do with each congregation in a normal week or month?
- What proportion of full-time service will be expected by each church, i.e., 50/50, 60/40, etc.?
- Where will the pastor live?
  - Near one church?
  - Between churches?
  - In a nearby urban area within commuting distance?
  - In a manse?
  - In rented housing?

Other items to include, as applicable, may be:

- Cash salary
- Housing allowance or manse maintenance
- Utilities
- Medical and pension dues
- Continuing education allowance
- Reimbursed professional expenses, e.g., travel
- Pastor search expenses, e.g., travel, lodging, meals, photocopying, telephone postage
- Moving expenses

Once the ministry covenant and details are agreed upon, the churches should also consider:

- Pulpit supply for six weeks per year (vacation and continuing education)
- Shared administrative expenses, e.g., worship bulletins, newsletters, postage
- Costs of joint programming, and whether these costs will be shared in the same proportion as the time sharing
- The amount of funding each church will provide
- How expenses will be handled, e.g., by one of the churches' treasurers or by an outside accountant
- The specific commitments each partner church makes to each other
- How the shared ministry will be evaluated
- What happens if there is dissatisfaction on the part of one or more of the partner churches
- What happens if the minister wishes to leave one church but not the other(s)
- Will both congregations pay the pastor separately, or will one congregation contribute their portion of the package to the other and that congregation issue compensation for both?

If the congregations desire to yoke after an adequate period of discernment, they will inform the moderator of MCPC, who will inform the moderator of the Ministry of New Congregation Formation (MNCF). MNCF will then guide the congregations through the details of the yoking process.

# **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

## **Annual Review of Session Records**

The Book of Order mandates that session records shall be reviewed annually or biennially, based on the body's meeting frequency. To meet this mandate, minutes of the congregations of the Presbytery of Florida are to be reviewed annually.

Minutes of stated and special meetings of the session, stated and special meetings of the congregation, and the church registry are to be prepared by the clerk of session using a review/check sheet provided by the Assistant Stated Clerk. This review sheet is to be completed prior to the annual review. (See the review form in the Handbook Supplement.)

The Assistant Stated Clerk, in consultation with the moderator of the MCPC or designee, shall secure locations and times in the three regions of the Presbytery for clerks of session to gather for the annual review. When gathered, the clerks of session (or their designees) will swap minutes and registers to conduct the annual review.

Upon completion of the review, the results will be shared with the submitting clerk of session (or his/her designee) before departing the event. The form will then be submitted to the MCPC representative or the Assistant Stated Clerk present, who will also go over the review. A letter attesting to the accuracy of the minutes and registry, as well as a copy of the review sheet, will be sent by the Assistant Stated Clerk to the clerk of session for inclusion in the session's Minutes Book.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Necrology Report

Pastors, certified Christian educators, ruling elders, deacons, and long-time staff members give a great deal of their lives to the work of our Lord. Each year, the earthly lives of some of these dedicated servants come to an end. It is highly appropriate to recognize their years of service and to give thanks to God for their faithfulness.

The Presbytery of Florida will, at the Presbytery meeting closest to All Saints Day each year, read a Necrology Report listing those who have died in the previous 12 months. In advance of this Presbytery meeting, the MCPC moderator or Assistant Stated Clerk will issue an invitation to submit names to either individual. Regional Advocates will also contact pastors and clerks of session to solicit names for recognition via the report; and submit them to the Assistant Stated Clerk and moderator of MCPC.

*The liturgy for use at Presbytery can be found in the Supplement to this handbook.*

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Term Exemptions for Officers in Small Congregations

It is understood that the Book of Order (G-2.0404) provides for term limitations for ruling elders and deacons. There are occasions when a congregation is too small or its members too infirm to engage in such mandatory rotations. Because of this, there is provision in the Book of Order to allow an exemption for rotating ruling elders and deacons:

### *G-2.0404 Terms of Service*

*Ruling elders and deacons shall be elected to serve terms of no more than three years on the session or board of deacons, and may be eligible for reelection according to congregational rule. However, no ruling elder or deacon shall be eligible to serve more than six consecutive years, and a ruling elder or deacon who has served six consecutive years shall be ineligible for election to the same board for at least one year. Election shall be to classes as nearly equal in number as possible, with the term of only one class ending each year. The Presbytery may, upon written request and by majority vote, grant a congregation a waiver of this limitation on terms.*

If a congregation needs to petition for this type of exemption, the current moderator and clerk of session must write a letter, stating reasons for the exemption, how long the exemption may last, and quoting that section of session minutes showing action by the session. This letter is to be sent to the Stated Clerk of the Presbytery who will put the request before the Presbytery at its next stated meeting.

### Sample Letter:

Dear \_\_\_\_\_:

\_\_\_\_\_ Presbyterian Church is a small but vital and active congregation. The ministries in which the congregation engage are meaningful and reaching our community. We are, however, small in number. We currently have 12 members on the rolls and an average worship attendance of 14 persons.

Given our current membership and the small pool of available persons able to serve as Ruling Elders, our congregation requests that the Presbytery of Florida grant an exemption to the requirement in the Book of Order (G-2.0404) that limits the terms of Ruling Elders' active service on session to two consecutive terms.

We would also ask that this exemption remain in place until such time that the membership of the congregation increases to the point at which it is able to again sustain the rotation mandate in the Book of Order.

Thank you for your consideration in this matter.

# **OVERSIGHT OF GRANTS AND RESOURCES**

## **MINISTRY OF CONGREGATIONAL AND PASTORAL CARE**

### **Presbyterian Investment and Loan Program (PILP)**

There are occasions when the Presbytery grants permission for congregations to apply for a loan through the Presbyterian Investment and Loan Program (PILP). PILP sends quarterly reports to the Stated Clerk, listing congregations that have outstanding loans. Listed on the report is the original amount of the loan, the remaining balance of the loan, whether the congregation is current or in arrears, and other pertinent information.

The Ministry of Congregational and Pastoral Care (MCPC) will receive from the Stated Clerk of the Presbytery a copy of this quarterly report for the purpose of keeping track of repayment by congregations. If a congregation falls behind in its payments, MCPC will contact that congregation to address the reason and potential reconciliation.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Policies for Awarding Revitalization Grants

The Ministry of Congregational and Pastoral Care (MCPC) oversees funding made available to help revitalize congregations in their service to the Lord and to the community in which they are situated. This will be extremely helpful as the climate toward “church” continues to evolve and refocus. To aid congregations in their attempt to revitalize and refocus their ministry, funding through MCPC may be available. *These forms may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*

### TYPES OF GRANTS AVAILABLE

There are four categories for which revitalization assistance may apply. ***All grants, if approved by the Ministry of Congregational and Pastoral Care, are considered to be matching grants up to the amount specified in this policy. Grants may be applied for once every 18 months.***

- **Equipment (up to \$1,000)**

Given current, broadly available digital communication and learning tools, outdated equipment holds little appeal for communicating with the digitally-literate. If just cause can be presented to demonstrate how updating equipment will play a key role in revitalizing and refocusing a congregation’s ministry, a request for equipment will be considered.

- **Emergency Repairs (up to \$5,000)**

There may be occasions when repairs to church facilities are needed for safety or to be more visually appealing to potential newcomers to a congregation. A leaky roof leaving water stains or rotting wood that needs to be replaced and painted are just a couple examples.

- **Pastoral Leadership (up to ½ the Presbytery minimum compensation requirements)**

Congregations that have completed the Holy Cow! Congregational Assessment Tool (CAT) and the MissionInsite demographic study, and which have devised strategic plans showing viability for future ministry, may apply for a Pastoral Leadership Grant. This is designed to help small congregations call a Presbyterian Church (U.S.A.) pastor to serve the congregation for a minimum of three years. There will be a stringent review process prior to awarding this grant.

- **Mini-Grant for Worship Enrichment (up to \$250)**

Small congregations, particularly those with part-time or temporary leadership, may determine that congregants would benefit from a degree of enrichment to help them more fully engage in the experience of worshiping together. This mini-grant is designed to encourage small-church leadership to consider ways in which worship can be revitalized through such investments as supporting leadership attendance at educational events, engaging a consultant, purchasing *Glory to God* hymnals, updating paraments, engaging in liturgical arts, creating banners, or other creative efforts. Dream, consider the options, and start planning. A new level of worship experience could be closer than you think.

### INITIAL CRITERIA

As Presbyterians, we are part of a connectional system. We work together and are a part of one another’s others’ lives. When a grant request is submitted, several initial criteria will weigh heavily in determining the merits of the request:

- Have members of the congregation been serving on committees of the Presbytery?
- Has the session been faithful in sending commissioners to attend Presbytery meetings?

- Has the congregation been faithful in financially supporting the work and ministry of the Presbytery?
- A copy of the congregation's financial budget and holdings will be required for all but the Mini-Grant.
- At least two (2) estimates will be required for the Emergency Repair Grant.

## SOURCE OF FUNDS

There arise occasions when a congregation within the Presbytery of Florida has fulfilled its ministry to our Lord. The completion of that ministry is celebrated at a time of worship and thanksgiving for the work accomplished. But the influence of that congregation—its assistance and aid to its sister churches—is not completely over, even though its doors have closed.

As is the policy of the Presbyterian Church (U.S.A.), the Presbytery is responsible for the disposition of the church property (G-4.0205). Funds received from the sale of the property are used to give witness to the connectional nature of our denomination and further the work of our Lord in our sister congregations and the Presbytery of Florida.

In 2025, the Presbytery of Florida passed the following in order to spread the funds in such a way as to best serve the Presbytery:

- 5% - Special, unbudgeted Presbytery projects
- 19% - Ministry on Congregational and Pastoral Care
- 19% - Ministry on New Congregational Development
- 19% - Dogwood Acres
- 19% - UKirk, Tallahassee
- 19% - Staff Support
- Any growth in the Reserve Fund shall be distributed *pro rata*.

Resources have been assigned to MCPC through investments made possible from the sale of the properties of churches whose congregations have concluded their ministries. With the approval from Presbytery, the maximum amount to be invested will be no more than \$500,000, the interest of which will be used to assist qualified projects and requests for support.

# **DISCERNMENT**

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Congregational Discernment and Revitalization

When a congregation wishes to determine its future direction, it may engage in a discernment process with trained consultants. The Ministry of Congregational and Pastoral Care (MCPC) maintains a working relationship with Holy Cow! Consulting and MissionInsite, sharing the cost equally with the Ministry of Pastoral Transitions (MPT). Because these helpful discernment tools are partially funded by the Presbytery, congregations are alleviated from the financial burden of paying the full cost. If MPT requires that a congregation use Holy Cow! and MissionInsite or a congregation opts to use Holy Cow! for its own mission study, the consultant will discuss the fee with the session before proceeding.

The Holy Cow! consultant:

- trains the congregation's session-appointed Local Arrangements Team and leads them through the designated process;
- shares with the session the detailed results of the assessment;
- presents the Executive Summary to the congregation;
- shepherds, as necessary, congregational discussion and discernment gained through the Holy Cow! assessment;
- provides demographic information for exploring needs in the area surrounding the congregation using MissionInsite;
- works with a session-appointed Revitalization Team that will be given the responsibility to discern areas of ministry most needed to move the congregation forward according to the results of the Holy Cow! assessment.

If desired, MCPC and MPT can also suggest other consulting agencies and participate with congregations in their decision-making and discernment process. The discernment process may lead a congregation to realize that a new direction is needed, that a few areas of ministry need to be adjusted, or that a whole new focus needs to be explored. Through their designated liaisons, MCPC and MPT will work with a congregation for as long as is necessary to help it determine next steps and to identify appropriate pastoral leadership.

# **RESPONDING TO CONFLICT**

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Administrative Commissions (ACs)

Councils exercise whatever administrative authority is necessary to give effect to duties and powers assigned by the Book of Order of the Presbyterian Church (USA). The jurisdiction of each council is limited by the express provisions of the Book of Order, with powers not mentioned being reserved to the presbyteries.

If the Ministry of Congregational and Pastoral Care (MCPC) of the Presbytery deems it wise and necessary for an AC to be appointed, they shall, after consultation with the Equipping Presbyter/Stated Clerk, form such a commission for purposes within its authority, with attention to protocols of balance and location, and provide for training. The purpose and power of such a commission shall also be made known to the Presbytery (*G-3.0109; G-3.0109b*).

In the Presbytery of Florida, such ACs are most often created to support healthy congregations that are struggling to populate a working session or to help a church with very few members and/or limited energy close with grace and with its legacy intact. ACs may also be created to assist a congregation and its leadership in a reconciliation that has not been able to be brought about by the congregation's leadership, an MCPC-authorized listening team or Pastoral Care Team, or other means of effecting discernment and reconciliation.

## Original Jurisdiction

ACs shall be accorded original jurisdiction where requested and warranted by circumstances as investigated and described by MCPC. Original jurisdiction may be provided for by the Book of Order (*G-3.0303e*), which gives Presbyteries the authority to:

*assume original jurisdiction in any situation in which it determines that a session cannot exercise its authority. After a thorough investigation, and after full opportunity to be heard has been accorded to the session, the Presbytery may conclude that the session of a congregation is unable or unwilling to manage wisely its affairs, and may appoint an administrative commission with the full power of session. This commission shall assume original jurisdiction of the existing session, if any, which shall cease to act until such time as the Presbytery shall otherwise direct.*

In no case shall an AC or an AC with original jurisdiction be requested or formed out of malice or as a punitive measure; rather, with love for the church, its ministry, mission, and legacy.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Congregational Care During a Disciplinary Process

*“Church discipline is the church’s exercise of authority given by Christ, both to guide, control, and nurture its members, and for the correction and restraint of wrongdoing. ... Church discipline through the judicial process shall be used when individuals or councils of the church are unable to bring about settlement of issues or when such settlement would be unwise, unjust, or ineffective, and have determined after prayerful deliberation that judicial process is necessary to ensure that individuals or councils are held accountable for their actions or inactions.”*

*“Thus, the purpose of church discipline is:*

- To honor God by making clear the significance of membership in the body of Christ;*
- To preserve the purity of the church by nourishing the individual within the life of the believing community;*
- To pursue and reveal the truth;*
- To achieve justice and compassion for all participants involved;*
- To correct or restrain wrongdoing in order to bring members to repentance and restoration;*
- To uphold the dignity of those who have been harmed by offenses;*
- To restore the unity of the church by removing the causes of discord and division; and*
- To secure the just, speedy, and economical determination of proceedings.” (Principles of Church Discipline, Preamble D-1)*

It is a serious matter when a complaint or allegation of misconduct that rises to a judicial level has been made against a minister of Word and Sacrament or a member of a session, diaconate, or congregation. Congregants often want to be supportive of those involved in the matter, which can create a dilemma.

The desire to know what has happened is understandable. Anxiety levels rise within a congregation when confidentiality is required and the details of the alleged offense cannot be shared, further adding to stress and unrest among its members. However, the Book of Order requires that confidentiality be maintained to protect both the accuser and the accused during the disciplinary process.

Comments and conversations about the matter can prove harmful to the involved parties, particularly when the parties instigate or are part of the conversations while an appropriate, Presbytery-led effort is being made to conciliate and mediate (*Matthew 5:25*), investigate, or adjudicate the matter. Presbytery leadership counsels that neither the accused nor the accuser speak to individuals outside the process about the matter at any stage to avoid the appearance of skewing opinion in one’s favor. The Book of Order *requires* that all members of the Permanent Judicial Commission (PJC) maintain the strictest confidentiality and neutrality as they review the requirements associated with their role, refraining from all communications that could, in any way, have an effect on their judgment in advance of evidence and testimony.

To help reduce anxiety, confusion, and stress within a congregation, MCPC will do its utmost to convey available information appropriately, compassionately, and *as quickly as possible* without breaking necessary confidentiality. In consultation, as appropriate, with the pastor and/or session of a church, the moderator or designee of MCPC will offer one or more in-person conversations with congregants to explain the PCUSA judicial process, requirements, and potential outcomes, which are described in full in the Book of Order, and which are summarized below. The MCPC moderator and/or designee will remain available throughout the judicial process to provide pastoral care to the congregation, session, and pastoral

leadership. The MCPC moderator or designee will also secure Pastoral Response Teams for the central individuals involved, taking care to assign teams in pairs.

## **Summary of the Judicial Process**

**The Role of Church Discipline** (Section D in the Book of Order) is for building up the body of Christ, not for destroying it, for redeeming, not for punishing. It should be exercised as a dispensation of mercy and not of wrath, so that the great ends of the Church may be achieved, that all children of God may be presented faultless in the day of Christ. (*D-1.01*). It is the church's exercise of authority given by Christ, both to guide, control, and nurture its members, and for the correction and restraint of wrongdoing (*D-1.02*). Judicial process is necessary to ensure that individuals or councils are held accountable for their actions or inactions (*D-1.0202*).

### **The Purpose of Church Discipline is:**

- To honor God by making clear the significance of membership in the body of Christ;
- To preserve the purity of the church by nourishing the individual within the life of the believing community;
- To pursue and reveal the truth;
- To achieve justice and compassion for all participants involved;
- To correct or restrain wrongdoing in order to bring members to repentance and restoration;
- To uphold the dignity of those who have been harmed by offenses;
- To restore the unity of the church by removing the causes of discord and division; and
- To secure the just, speedy, and economical determination of proceedings.

It should be employed only . . . when it is determined to be necessary to preserve the peace, unity, and purity, or to accomplish the purposes of the church. (*D-1.04*)

**The Primary Council of Jurisdiction** for members of congregations is the session. For ministers of Word and Sacrament the primary council of jurisdiction is the Presbytery (*D-7.0301*).

**An Offense** is any act or omission . . . that is contrary to the Scriptures or the Constitution of the Presbyterian Church (U.S.A.) (*D-2.0302*).

### **The Disciplinary Process for a Minister of Word and Sacrament** proceeds as follows:

- A written allegation is submitted to the stated clerk by any member of the Presbyterian Church (U.S.A.).
- A member may self-accuse (*D-7.0201.f*).
- Without undertaking further inquiry, the Stated Clerk informs Presbytery that an offense is alleged (no names) and refers the allegation to an Investigating Committee (IC) composed of three to five members of the PC(U.S.A.) (*D-7.06*).
- The IC makes inquiries into facts and circumstances of the alleged offense.
- The IC determines if there are reasonable grounds to believe an offense has been committed.
- The IC decides whether the offense can be proved.
- If the IC decides to file charges, it is responsible for preparing the charges.
- The IC determines if an alternative resolution should be pursued.
- If no alternative resolution is recommended, the IC files charges with the Permanent Judicial Commission (PJC).

*Appropriate confidentiality is to be maintained throughout the process (D-7.1004). Allegations of sexual abuse have further required parameters.*

**The Investigating Committee** may decide

- a. not to file charges;
- b. to file charges and proceed to trial; or
- c. to file charges together with an alternative resolution (*D-7.13*).

**An Alternative Resolution** may take the following forms, depending on a guilty plea:

- a. Restorative justice
- b. Mediation
- c. Other negotiated agreements

**Degrees of Censure** (*D-9.0101*)

Censure is given, not with malice or vindictiveness, but in Christian love to offer correction and restoration of the community. The degrees of censure specified in the Book of Order are:

- Rebuke
- Rebuke with supervised rehabilitation
- Temporary exclusion from exercise of ordered ministry
- Removal from ordered ministry

The degree of censure imposed by the Permanent Judicial Commission (PJC) must be given as a public oral report at the next scheduled meeting of the council in which adjudication was held, using the language prescribed in the Book of Order. The report is then entered into the permanent record of the judicial council.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## **Policy for Discernment Toward Reconciliation or Separation of Congregations in the Presbytery of Florida**

*Adopted by the Presbytery of Florida on October 27, 2026 (pending)*

*Next review: August 2028*

### **I. PREAMBLE**

In 2008, the General Assembly of the Presbyterian Church (U.S.A.) urged presbyteries to adopt a clear process for considering the dismissal of congregations to another Reformed body. The Assembly highlighted guiding principles: consistency, pastoral responsibility, accountability, a gracious witness, and openness and transparency.

Unity in Christ guides this work (Eph. 4:1–3; Nicene Creed 1.3; Confession of 1967 9.34; *Book of Order* F-1.0302a). The Presbytery seeks reconciliation wherever possible, engaging congregations with honesty, compassion, and prayer. If reconciliation becomes untenable, dismissal is considered a matter of pastoral care. Only the Presbytery may dismiss a congregation (G-3.0303b; G-4.0203-G-4.0207). Congregational votes are advisory (G 1.0503-G-1.0504; G-3.0303).

Additionally, all property is held in trust by the PC(USA) (G-4.0203-G-4.0207). Former PCUS congregations that chose exemption under G-4.0208 retain their transactional authority, but remain accountable to the principle that they hold property in trust for the mission of the Presbyterian Church. The Presbytery and session commit to prayer, honesty, prompt communication, protection of minority members, and no unilateral changes to assets.

The process of engagement outlined in this policy consists of three phases:

1. Initial Contact and Dialogue
2. Discernment
3. Resolution

All definitions of terms and the polity rationale behind this policy may be found in Appendix A. A list of receiving Reformed bodies approved by this Presbytery may be found in Appendix B.

### **II. THE PROCESS OF ENGAGEMENT**

When significant turmoil or interest in dismissal arises, the following steps apply:

#### **Initial Contact and Dialogue**

##### **Formation of an Administrative Commission**

The Ministry of Congregational and Pastoral Care (MCPC) will appoint and train an Administrative Commission per page 42 of the MCPC Handbook, and the Presbytery will be informed accordingly. The AC will meet with the Session Moderator and the Session to discuss concerns, provide copies of this policy with appendices, review and explain it in full, entertain questions, and seek reconciliation. The AC may dissolve pastoral relationships (G-2.0901; G-3.0109b(5)), transfer members (G-3.0301c), dissolve the corporation, and oversee remaining matters.

##### **Powers Granted to an Administrative Commission of Presbytery to Consider a Dismissal Request**

1. Convene the Session and any subsidiary boards or committees of the congregation.
2. Interview the pastor(s) and all employed staff.
3. Consult with the congregation regarding its future and its relationship with the PC(USA).
4. Interview individual members as needed.
5. Require production of Session minutes, membership rolls, financial records, and any other documents deemed relevant to its work.

6. Recommend to the Presbytery any actions for resolving issues within the congregation, including:
  - dissolution or dismissal of the congregation,
  - the disposition of the congregation's property,
  - the status or transfer of teaching elders connected to the congregation,
  - the transfer of members wishing to remain in the PC(USA) following dismissal.
7. Call a congregational meeting for any purpose allowed under the Book of Order.
8. Recommend which individuals, if any, constitute a continuing PC(USA) congregation under the authority of the presbytery.
9. Assume original jurisdiction, when authorized by the MCC, if the Session is unable or unwilling to manage the affairs of the church wisely, following the due process outlined in G-3.0303e.

#### Consultative Powers of the Administrative Commission

1. Engage and consult with Presbytery staff and the Stated Clerks of the Presbytery, Synod, and/or General Assembly.
2. Retain legal counsel.
3. Review minutes and records of both the Presbytery and the congregation.
4. Consult with relevant Presbytery committees or representatives.
5. Maintain a budget and authorize expenditures necessary to carry out its work.

#### **Discernment Phase**

The AC shall meet with the Session and, as appropriate, with members of the congregation to discern God's will regarding the congregation's relationship with the Presbytery and/or the PC(USA). Its purposes include identifying concerns, exploring paths toward reconciliation, and ensuring accurate understanding of Presbyterian polity and process. The desired outcome is to determine whether the congregation's concerns can be addressed in a way that maintains its fellowship within the Presbytery.

#### **Prayerful Determination of the Possibility of Reconciliation**

The AC will meet promptly with the Session to hear its concerns.

- If resolution is reached, the AC will report its findings to the Presbytery and recommend dissolution of the AC.
- If concerns cannot be quickly resolved, the AC will request a clear written statement from the Session explaining its reasons for considering dismissal and the anticipated benefits.

#### **Purposes of AC Engagement with the Session and Congregation**

1. Facilitate prayerful conversation with Session leaders or the full congregation to understand the nature, breadth, and sources of turmoil and/or the desire for dismissal, and to hear from those who wish to remain in the PC(USA).
2. Establish a timeline and, if appropriate, engaging further dialogue aimed at reconciliation.
3. Provide information about the implications of dismissal from the PC(USA).
4. Inform all teaching elders serving or connected with the congregation about the likely impact on their benefits and ordination status.
5. Identify financial, property, and related issues, recognizing that church property exists to serve the mission of Christ (G-4.0201) and should not be used to foster division.

If no progress toward reconciliation is made, the AC will notify the Stated Clerk and the MCC Moderator to begin processes for dismissal or dissolution.

The AC shall work to hear from all members and will coordinate with the Session to schedule congregational hearings for open discussion of concerns, disputes, and matters relating to possible dismissal or dissolution. These hearings:

- are **not** congregational meetings (G-1.05),
- may include written or phone input from members unable to attend,
- must include an announcement noting the 2008 Authoritative Interpretation stating that withdrawal from the PC(USA) is not a matter for congregational vote.

If appropriate, the AC may conduct a survey of active members to assess the level of support for dismissal.

### **Resolution Phase**

The AC shall report its recommendations in writing to the Presbytery regarding whether to proceed with consideration of dismissal.

1. If the AC recommends not proceeding with dismissal or dissolution, it shall report this to the Presbytery and act within its authority to promote healing and reconciliation.
2. If the AC recommends proceeding with dismissal, the AC and Session shall discuss and negotiate a proposed plan of dismissal, addressing:

**a. Receiving Denomination**

A congregation may be dismissed only to another Reformed body approved by the Presbytery. A list of approved Reformed bodies is provided in Appendix B.

**b. Property (Real and Liquid)**

- The Session shall provide a verified list of all assets and liabilities.
- The Presbytery's responsibility for congregational property must be considered in the context of its mission (G-4.0201).
- All parties must recognize that "the church" is its people, not its assets.
- Any proposal involving sale or mortgaging of real estate must be approved by the congregation before being submitted to Presbytery (G-1.0503).

**c. Status of Teaching Elders and Ruling Elders**

Teaching Elders must conduct themselves with decorum and integrity throughout the process. Key principles include:

- Installed Teaching Elders' relationships are dissolved as negotiated in the dismissal plan.
- Teaching Elders remaining in the PC(USA) shall receive a severance of at least three months' salary and benefits in negotiation with the Session and the AC.
- Teaching Elders seeking transfer will be dismissed upon request of the receiving denomination.
- Commissioned Ruling Elders follow parallel processes regarding their call and membership.
- All elders remain subject to Church Discipline.

**d. Members Wishing to Remain in the PC(USA)**

The AC shall:

- Consider the viability of the congregation (even if those members are a minority) to carry on the mission of the PCUSA in the current location, with the full or negotiated assets of the church.
- Negotiate appropriate support and resources for these members who wish to remain members of the PCUSA, based on factors such as number, proximity to existing congregations, and pastoral needs.

**e. Reporting to Presbytery**

Once a plan is agreed upon, the AC shall submit the plan and rationale in writing to the MCC at least two weeks before the meeting at which it will be considered. This report will include a narrative describing the options that were considered and reasons for their rejection as well as a rationale for recommendations.

**f. Presbytery Action**

The Presbytery shall vote by written ballot:

Motion: "Shall the *(Name)* Presbyterian Church be dismissed to *(Name of Reformed Body)* based on the proposed plan?" Ballot choices: Yes / No

The terms of dismissal, vote count, and AC report will be recorded in the minutes.

**g. Outcomes**

- If approved: The AC implements the plan.
- If amended: The AC consults with the Session to assess acceptability and reports back; final approval occurs at a subsequent meeting.
- If not approved: The AC reports this to the congregation and works with the Session on next steps.

If no acceptable resolution is possible, the AC may consider assuming original jurisdiction and recommend dissolution.

**Powers Granted to the Administrative Commission After a Presbytery Vote to Dismiss a Congregation**

- Dissolve pastoral relationships (G-2.0904).
- Transfer members of a dissolved congregation to other congregations within the Presbytery, pending their acceptance by those Sessions (G-3.0303).
- Dissolve the church's corporation and address any remaining legal matters related to the dissolution.

## APPENDIX A

### Definitions and Rationale

The following definitions and rationale apply:

**Consistency:** The local authority delegated to presbyteries is guided and shaped by our shared faith, service, and witness to Jesus Christ.

**Pastoral Responsibility:** The requirement in G-3.109 to consult with the members of a church seeking dismissal highlights the Presbytery's pastoral responsibility, which must not be submerged beneath other responsibilities.

**Accountability:** For a governing body, accountability rightly dictates fiduciary and connectional concerns, raising general issues of property (G-4.0000) and specific issues of schism within a congregation (G-4.0207). But full accountability also requires preeminent concern with caring for the flock.

**Gracious Witness:** It is our belief that Scripture and the Holy Spirit require a gracious witness from us rather than a harsh legalism.

**Openness and Transparency:** Early, open communication and transparency about principles and process of dismissal necessarily serve truth, order, and goodness, and work against seeking civil litigation as a solution. (Minutes, 2008, Part I, p. 284-285)

The Holy Scriptures, Confessions, and Book of Order also guide the Presbytery of Florida in forming this policy:

"I therefore, a prisoner in the Lord, beg you to lead a life worthy of the calling to which you have been called, with all humility and gentleness, with all patience, bearing with one another in love, making every effort to maintain the unity of the Spirit in the bond of peace." (Ephesians 4:1-3)

"We believe in one holy catholic and apostolic Church." (Nicene Creed, *Book of Confessions* 1.3.)

"The institutions of the people of God vary as their mission requires in different times and places. The unity of the Church is compatible with a wide variety of forms, but it is hidden and distorted when variant forms are allowed to harden into sectarian divisions, exclusive denominations, and rival factions." (Confession of 1967, *Book of Confessions* 9.34.)

"The Church is to be a community of love, where sin is forgiven, reconciliation is accomplished, and the dividing walls of hostility are torn down." (*Book of Order* F-1.0301)

Our unity is in Jesus Christ our Lord and Savior. Together the Presbytery and congregation seek to discern how best to fulfill our shared mission to serve God as brothers and sisters in Christ.

We seek to do so through honest and compassionate communication, prayerful discernment, and loving reconciliation where possible, so that harmony may be restored and mission strengthened. The whole Church belongs to our one Lord, Jesus Christ, though it is possible, and at times even desirable, that we may differ from one another in matters of faith and practice while remaining one in Christ.

There may be circumstances in which members within a congregation believe that mutual reconciliation within the Presbyterian Church (U.S.A.) [hereafter PCUSA] is no longer tenable. In such instances, the parties may seek to discern whether a dismissal is appropriate, and the Presbytery shall regard decisions with respect to congregations considering or seeking dismissal as a matter for pastoral care and not primarily for discipline. In some instances, the presbytery may dismiss congregations from the PCUSA to join with a Reformed denomination approved by the Presbytery of Florida. Such authority resides with the Presbytery alone (*Book of Order* G-3.0303b, G-4.0203, G-4.0207), and no action regarding possible dismissal shall be undertaken without a thorough evaluation exercising due diligence and prayerful consideration by the Presbytery and congregation. In the spirit of the Apostle Paul, we seek together to discuss and arbitrate any disagreements peaceably as brothers and sisters in Christ before seeking any civil remedies afforded by law (1 Corinthians 6:1-8).

The various congregations and governing bodies of the PCUSA are organically connected as parts of one body; it is the Presbytery that charters and formally recognizes congregations. We are a connectional church, bound not only to one another, but also in a historical sense to generations past and future. The intentions of Presbyterians now passed must be honored in order to safeguard church life for Presbyterians not yet born. We must not assume that any controversies that divide us in the present age will be the marks of permanent division for all time. When faced with the possibility of any kind of separation, the Presbytery shall maintain the integrity of Presbyterian ministry and governance as set forth in the Constitution of the PCUSA including those provisions of the *Book of Order* with regard to property:

“All property held by or for a particular church, a presbytery, a synod, the General Assembly, or the Presbyterian Church (U.S.A.), whether legal title is lodged in a corporation, a trustee or trustees, or an unincorporated association, and whether the property is used in programs of a particular church or of a more inclusive governing body or retained for the production of income, is held in trust nevertheless for the use and benefit of the Presbyterian Church (U.S.A.).”

(*Book of Order* G-4.0203–G-4.0207)

This provision places on the Presbytery a fiduciary responsibility to see that decisions with regard to church property are made in ways that reflect the best interests of the whole Presbytery and PCUSA, as well as those of the particular congregation, for the future as well as for the present, being faithful to the witness of the past. These same fiduciary responsibilities are held by the Presbytery with respect to congregations that exercised their option for exemption pursuant to *Book of Order* G-4.0208. Section G-4.0208 preserves the right of those former congregations in the Presbyterian Church in the United States (PCUS) that made that election to buy, sell, or mortgage real property without seeking the permission of the Presbytery, but maintain the fiduciary responsibilities to hold the property and its proceeds in trust for the benefit of the PCUSA as provided in the *Book of Church Order* in the former PCUS to which those congregations were subject. The following congregations in Florida Presbytery have exercised this exception:

Crestview, First  
DeFuniak Springs, Euchee Valley  
DeFuniak Springs, First  
Destin, First  
Havana, First  
Lynn Haven, First  
Marianna, First  
Monticello, First

Panama City Beach, Gulf Beach  
Panama City, Parkway  
Pensacola, First  
Quincy, First  
Woodland  
*Madison, First (closed)*  
*Panama City, St. Andrews (closed)*  
*Pensacola, Westminster (closed)*  
*Tallahassee, Covenant (dismissed)*

Only the Presbytery is empowered to organize, dissolve, or dismiss a particular church to another Reformed body that has been previously approved by the Presbytery (*Book of Order* G-3.0303). The Session and/or congregation may not act unilaterally to separate itself from the PCUSA. A presbytery is required to consult with the membership of a church to aid it in its discernment about whether or not to dismiss that congregation. Any congregational “votes” are advisory only and have no inherent civil or ecclesiastical force (*Book of Order* G-1.0503, G-3.0303). After the aforementioned consultation with the congregation, the Presbytery, in its sole discretion, shall determine such terms and conditions of dismissal as may assure it of the faithful stewardship of the particular church and its property.

The goal of this Presbytery will always be reconciliation and continued engagement in relationship with all congregations within the Presbytery without the threat of isolation, estrangement, or blame. The Presbytery is to be a servant to the churches God has entrusted to us, encouraging and supporting them toward becoming healthy, growing congregations. This is especially true for those congregations for whom the bonds of unity are stretched and ecclesiastical connections frayed over issues of conscience to the point of considering dismissal. Presbytery and Session are to work together in good faith towards reaching a mutually agreeable resolution. Working in good faith includes the following commitments:

1. Both the Presbytery and the congregation shall covenant to pray for each other, to bless the work each does for the gospel, and to seek diligently the will of God for the sake of the church’s witness to Jesus Christ.
2. Both representatives of Presbytery and the congregation shall seek resolutions, faithful to the past, present, and future witness of the PCUSA in Florida Presbytery.
3. Both the Presbytery and the congregation’s teaching and ruling elders shall be open, honest, and respectful in all their dealings with each other.
4. The congregation’s Teaching and Ruling Elders shall provide all requested information and documents to the Administrative Commission on a timely basis.
5. The congregation’s Teaching and Ruling Elders shall protect the rights of those members who desire that the congregation remain loyal to the PCUSA, or who desire to remain congregants of another PCUSA church.
6. The congregation’s Teaching and Ruling Elders shall refrain from any unauthorized unilateral changes in the way the congregation’s assets are held or managed.

## **APPENDIX B**

### **List of Approved Receiving Reformed Bodies**

1. United Church of Christ (UCC): Engaged in a full communion agreement with PCUSA, allowing shared ministries.
2. Reformed Church in America (RCA): In full communion. Connected through formal agreements allowing cooperation in mission and ministry.
3. Evangelical Lutheran Church in America (ELCA): They share a full communion partnership, facilitating shared worship and mission.
4. Moravian Church: While not in full communion, it has a partnership with PCUSA promoting mutual support and collaboration.
5. Christian Church (Disciples of Christ): While not in full communion, there are strong ties through ecumenical efforts.
6. A Covenant Order of Evangelical Presbyterians (ECO): A number of congregations of the PCUSA joined this denomination over gender issues. Now ordains women to ministry.
7. Presbyterian Church in America (PCA): A denomination of Reformed churches that does not ordain women, but does have a common confessional heritage with the PCUSA.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Guidelines for the Dissolution of a Pastoral Relationship

### Purpose:

There comes in the life of every congregation when its pastor either accepts a call to a new congregation or decides to retire. This information is intended to provide guidance to make the dissolution process smoother, to ease the move into being a church in transition, and to assure that the needs of both the congregation and the pastor are met. *If the desire for dissolution is part of a conflictual situation, installed pastors and sessions should use, instead, the Guidelines for a Contested Dissolution and Separation of a Pastoral Relationship that follow.*

### Guidelines:

1. Installed pastors preparing to dissolve the pastoral relationship with his, her, or their congregation should notify the Equipping Presbyterian/Stated Clerk, the moderator of the Congregational and Pastoral Care (MCPC), and the moderator of the Ministry of Pastoral Transitions (MPT) of the anticipated departure *at the very earliest possible time*. The moderator of MCPC (or designee) will guide the pastor and session through the dissolution process, Guidelines 2 and 3 below.
2. When the installed pastor has informed the session of the need to dissolve the pastoral relationship, the session will select a day and time for a congregational meeting in accordance with G-2.0901. The purpose of the congregational meeting is to “consider the matter and to consent, or decline to consent, to dissolution.” An installed pastoral relationship *can only be dissolved by the Presbytery*.
3. Upon completion of the congregational meeting, assuming the congregation has concurred with the installed pastor’s request for dissolution, the clerk of session shall prepare a copy of the minutes of the congregational meeting and email it to the Presbytery’s Equipping Presbyterian/Stated Clerk.
4. Upon receipt of the session minutes stating the congregation’s concurrence with the pastor’s desire to have the relationship dissolved, the Presbytery will take steps to dissolve the pastoral relationship. At this juncture, the congregation will come under the care and advisement of the Ministry of Pastoral Transitions (MPT).
5. Should the church’s leadership and/or congregation need additional care beyond the standard processes that are part of the transition process, the MCPC may be requested by the Equipping Presbyterian/Stated Clerk, Regional Advocate, or the moderator of the MPT to assist the MPT in providing care to the congregation.

# MINISTRY OF CONGREGATIONAL AND PASTORAL CARE

## Guidelines for a Contested Dissolution and Separation of a Pastoral Relationship

### Purpose:

Anger, fear, and frustration combine with many other emotions when a congregation and its pastor disagree about the continuance or dissolution of a pastoral relationship. This information is intended to provide guidance to ease tensions and limit destructive exchanges between individuals, to assure that the needs of both the congregation and the pastor are met, to make the dissolution process smoother, and to protect all parties involved from civil litigation.

### Guidelines:

- 1) All dissolution/separation agreements shall be compatible with the provisions of the current *Book of Order*.
- 2) The moderator of the Ministry of Congregational and Pastoral Care (MCPC) and the Equipping Presbyterian/Stated Clerk (or their designees) will facilitate the negotiation of the dissolution/separation agreement, inviting the session to designate no more than three persons, and the pastor to designate no more than three persons to participate in this process.
- 3) A dissolution/separation agreement shall be documented in writing. A plan to cover the costs of an agreement must be included in the document. *This form may be found in the Supplement to this handbook and in fillable format on the Presbytery website.*
- 4) A dissolution/separation agreement must be approved by both the congregation and MCPC as a whole before it can take effect.
- 5) Ordinarily, a separation agreement will include negotiated results of:
  - a. The date upon which the dissolution/separation is to become effective;
  - b. The last date on which the minister will be expected to perform ministerial duties;
  - c. Last date of effective salary;
  - d. Last date of payment of dues to the Board of Pensions;
  - e. Provision of loan repayment or shared equity arrangement (where applicable);
  - f. Use of the manse (where applicable), normally not to exceed two months;
  - g. Provision for use of the office, equipment, etc., not to exceed 30 days from the effective date of separation;
  - h. Terms and time limits on physical presence on church premises, not to exceed 30 days from the effective date of separation;
  - i. A statement that, if the pastor finds a full-time call or comparable employment prior to the conclusion of the terms of the agreement, the church's financial obligations for the continuation of effective salary ends as of the date said full time call/employment begins. A part-time call or employment will result in appropriate prorated adjustments in financial payments.

Note: MCPC, as a whole, shall review the written agreement and details of the written agreement for approval. The agreement is to be made available to members of the congregation at the congregational meeting at which the dissolution/separation agreement is to be considered.

- 6) If parties to a disagreement are unable to reach a mutually-acceptable dissolution/separation agreement through the counsel and mediation of MCPC, and if the Team finds that the church's mission under the Word imperatively demands the dissolution of the pastoral relationship, then MCPC shall recommend a dissolution agreement to the Presbytery with terms of dissolution of its devising.

# Supplemental Materials: Policies, Forms, and Liturgies

# INCIDENT REPORT – PRESBYTERY OF FLORIDA

Phone: 850-535-2335

Please use this form to report incidents of injury, medical emergencies, significant camper misbehavior, sexual abuse/misconduct, workplace/sexual harassment, or endangerment of minors/vulnerable adults. If possible, a report should be completed within 24 hours of the event. Reports of sexual abuse/misconduct have no time limit.

**Danger or medical emergency?** Call **911** immediately and stay with/near the victim.

**Minor or vulnerable adult endangerment?** Call the Florida DCF Hotline **1-800-962-2873**.

Submit the completed form directly to:

**Dogwood Acres incidents:** [staff@dogwoodacres.org](mailto:staff@dogwoodacres.org)

**All other Presbytery incidents:** Assistant Stated Clerk via [Incident@presbyteryofflorida.com](mailto:Incident@presbyteryofflorida.com)

A **fillable version** of this form is available at: <https://www.presbyteryofflorida.net/resources/>

Date of Report: [Date]

## REPORTING PERSON

Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

## INVOLVED PERSON/S

1. Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

2. Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

**If more space is required attach additional sheet with contact information as above.**

## INCIDENT TYPE

☐ Injury

☐ Sexual Abuse/Misconduct

☐ Behavioral

☐ Workplace/Sexual Harassment

☐ Medical

☐ Endangerment of Minors/Vulnerable Adults

☐ Other Incident: [Brief Description]

## INCIDENT DETAILS

Date of Incident: [Date]      Time: [Time] ☐ AM ☐ PM

Location of Incident: [Location]

Describe the Incident: [Describe the Incident]

Action Taken: [Action Taken]

## INJURIES

Was anyone injured? ☐ Yes ☐ No

If yes, describe the injuries: [Description of Injuries]

## WITNESSES

Were there witnesses to the incident? ☐ Yes ☐ No

If yes, enter the witnesses' names and contact info: [Name(s) / Contact Info]

## POLICE / MEDICAL SERVICES

Police Notified? ☐ Yes ☐ No      If yes, was a report filed? ☐ Yes ☐ No

Was medical treatment provided? ☐ Yes ☐ No ☐ Refused

If yes, where was medical treatment provided? ☐ On-site ☐ Hospital ☐ Other: [Other]

## PERSON FILING REPORT

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

Print Name: \_\_\_\_\_

**OFFICE USE ONLY**

Report received by : [Name] Date: [Date]

Follow-up action:

Action Taken: [Describe]

# **BOUNDARY POLICIES**

## **Antiracism Policy**

*Adopted by the Presbytery of Florida on May 16, 2026*

*Next review: August 2028*

In accordance with the Constitution of the Presbyterian Church (U.S.A.), the Presbytery of Florida seeks to enable its members and congregations to give effective witness in the world to God's new creation in Jesus Christ, and to strengthen their witness to the mission of the triune God (G-3.0106). This endeavor includes mandatory antiracism training every thirty-six months, at minimum.

In light of the antiracism statement affirmed by the Presbytery of Florida in October 2020, this Presbytery reaffirms that racism is a sin which violates our commission to love one another as Jesus loves us all. We believe that we are called to advance the Kingdom of God, on earth as it is in heaven, by actively countering racism.

This Presbytery is, therefore, committed to:

- rejecting discrimination on the basis of race or ethnicity;
- taking and making opportunities to demonstrate our belief in the essential equality of all human beings as created in the image of God;
- working together as children of God for the advancement of love and peace throughout the world;
- resisting injustice in every form, in keeping with what Jesus has commanded us to do;
- demonstrating compassion and caring in support of those who have been wronged through acts of racism;
- educating our congregations in non-discriminatory practices;
- bearing witness to our love for Jesus and our fellow humans through congregational mission and ministries and, as individuals, in our daily lives.

The 222nd General Assembly (2016) approved a churchwide antiracism policy titled [\*Facing Racism: A Vision of the Intercultural Community\*](#), with [an accompanying study guide](#) for use by councils and congregations. The Presbytery of Florida adopts this policy for its own use as it implements General Assembly directives to build an intercultural church in which justice and equality prevail. The Presbytery also adopts the accompanying study guide as a basis for mandatory training within its bounds. Upon adoption by the Presbytery, this policy may be used as a model or standard by sessions and congregations developing their own policies for dealing with allegations of racism within the local session's jurisdiction.

Antiracism training shall be required at least every thirty-six months for:

1. Teaching Elders and Commissioned Ruling Elders (CREs) serving congregations;
2. Teaching Elders in validated ministries;
3. Certified Christian Educators;
4. Teaching Elders and Ruling Elders elected to Presbytery service;
5. Candidates for ministry; and
6. Presbytery staff.

The Ministry of Leadership Development (MLD) shall:

1. develop antiracism training based on [\*Facing Racism\*](#) and the [accompanying study guide](#), and provide the training at locations across the Presbytery. Components of the training may be offered at Presbytery meetings, at dedicated in-person workshops, or remotely via Zoom.
2. authorize alternate training for those unable to attend approved training held within the Presbytery.
3. maintain a record of those who complete training. This requirement shall be included in all Terms of Call and all pastoral contracts. Those who fail to complete training shall be considered "not in

good standing” with the Presbytery of Florida, and the Equipping Presbyter/Stated Clerk shall maintain a file of those so considered.

The Presbytery strongly encourages all sessions and members of congregations, especially those in leadership positions, to participate in approved antiracism training. The Presbytery will publish a training schedule annually that includes times and locations, as well as approved alternate training.

## **Protection of Minors and Vulnerable Adults Policy**

*Adopted by the Presbytery of Florida on May 16, 2026*

*Next review: August 2027*

The members of the Presbytery of Florida believe we are called by God to create a safe haven for all minor persons and vulnerable adults participating in activities designed to nurture, protect, and empower them through faith and trust. This commitment includes taking appropriate steps to reduce the risk to minors and vulnerable adults in our care, hereafter referenced collectively as minors/vulnerable adults.

The following policy is established to minimize the risk to minors/vulnerable adults from being subjected to sexual, physical, or mental/emotional abuse. These procedures are also intended to respect the rights of, and afford due process to, persons accused of improper conduct.

Upon adoption by the Presbytery, this policy may be used as a model or standard by sessions and congregations developing their own policies for protection of minors and vulnerable adults within the local session's jurisdiction.

Training relative to this policy shall be required at least every thirty-six months for:

1. Teaching Elders and Commissioned Ruling Elders (CREs) serving congregations;
2. Teaching Elders in validated ministries;
3. Certified Christian Educators;
4. Teaching Elders and Ruling Elders elected to Presbytery service;
5. Candidates for ministry; and
6. Presbytery staff.

### **Definitions**

**Minor Person (Minor):** A minor in the state of Florida is any individual under the age of 18.

**Vulnerable Adult:** "A person 18 years of age or older whose ability to perform the normal activities of daily living or to provide for his or her own care or protection is impaired due to a mental, emotional, sensory, long-term physical, or developmental disability or dysfunction, or brain damage, or the infirmities of aging." ([www.flsenate.gov/laws/statutes/2012/0415.102](http://www.flsenate.gov/laws/statutes/2012/0415.102))

**Paid/Contracted Staff:** Any adult who is paid or contracted to work with or in close proximity to minors/vulnerable adults at a Presbytery of Florida function or event.

**Volunteer:** Any unpaid person who is entrusted with the care and supervision of minors/vulnerable adults, or a person who directly oversees and/or exerts control or oversight of minors/vulnerable adults.

**Sexual Abuse:** See Florida Statute at <https://m.flsenate.gov/Statutes/827.071>.

## Screening, Training, and Background Checks

One who works with or in close proximity to minors/vulnerable adults, whether on the basis of a paid staff, contractor, or volunteer, shall be subject to:

1. The approval of completed and signed application and background check authorization forms, including a signed form verifying the event policy has been read. The application shall include a minimum of two references.
2. All who work with or in close proximity to minors/vulnerable adults must ordinarily be at least eighteen years old.
3. The applicant's consent to a criminal background check. The Presbytery of Florida will conduct and cover the cost of background checks for all volunteer and paid workers. These checks shall be run no more than six months prior to the event, and may be valid for 2 years, depending on insurance company standards. Note: Contractors will ensure that their workers have passed a Level 2 background check prior to working with or in close proximity to minors/vulnerable adults.
4. All those who work with or in close proximity to minors/vulnerable adults - paid, contracted, or volunteer - must participate in training within the year prior to the event. The training is to be provided by the Presbytery of Florida through the Ministry of Leadership Development and shall cover this protection policy thoroughly, as well as methods of abuse prevention and a detailed plan of reporting. Outside experts may be contracted to provide this training. These trainings shall further cover:
  - What constitutes minor/vulnerable adult abuse and neglect
  - How to recognize signs and symptoms of abuse and neglect
  - Definitions of abuse and reporting
  - Mandatory criminal background checks and the security of those files
  - Explanation of the importance of the application and screening processes
  - Appropriate boundaries with minors, especially regarding adult-to-minor ratios, transportation, and use of technology
  - Overnight events: appropriate sleeping arrangements and restroom/shower facilities use
  - First Aid/CPR requirement: At least one volunteer or paid staff member working directly with or in close proximity to event participants must be certified in first aid and CPR.
  - Other related topics
5. No person may serve as a minor/vulnerable adult worker who has a conviction on his/her/their record of certain felonies or misdemeanors, including, but not limited to, any of the following:
  - Criminal homicide
  - Aggravated assault
  - Crimes related to the possession, use, or sale of drugs or controlled substances
  - Sexual abuse
  - Sexual assault
  - Incest
  - Indecency with a youth
  - Inducing sexual conduct or sexual performance of a minor/vulnerable adult
  - Possession or promotion of child pornography
  - The sale, distribution, or display of harmful material to a minor/vulnerable adult
  - Abandonment or endangerment of a minor/vulnerable adult

- Domestic violence
- Any crime that involves abduction, kidnapping, or unlawful restraint
- Public lewdness or indecent exposure
- Any crime that involves sexual misconduct or sexual abuse, particularly if it involves misconduct or abuse with a minor
- Any crime that involves misuse of technology for sexual purposes, such as collecting or distributing photographs of minors who are naked or in sexual or inappropriate poses (child pornography)
- Any crime that involves the use of force, such as assault or endangerment
- Any crime that involves drinking and driving, such as driving while intoxicated

In addition, if any council, as defined in the current version of the *Book of Order* of the Presbyterian Church (U.S.A.), of the Presbytery of Florida is aware that one who wishes to work with or in close proximity to minors/ vulnerable adults has a prior conviction for one of the aforementioned crimes or a related crime, that person shall automatically be ineligible to serve.

For the purpose of protecting minors/vulnerable adults while participating in Presbytery-sponsored events, including Dogwood Acres summer camp and youth events, the Presbytery will facilitate statewide and national criminal history checks through the Volunteer & Employee Criminal History System (VECHS). Additionally, prospective employees, volunteers, or contractors working with or in close proximity to minors/vulnerable adults will be checked through the Dru Sjodin National Sex Offender Public website. The criminal history checks (Level 2 Background Screening) requires fingerprinting of the applicant/person to be screened.

### **Paid or Volunteer Counselors at Dogwood Acres**

The Florida Department of Children and Families has specific requirements regarding summer camp background screening. Personnel described as owners, operators, employees, and volunteers working in summer day camps and summer 24-hour camps providing care for children must be screened (Level 2). If an individual has not had or cleared a background check, an employer may not hire, select, or otherwise allow such a person to have contact with any minor/vulnerable adult. Volunteers who assist on an intermittent basis for fewer than 10 hours per month do not need to be screened, if a person who meets the screening requirement is always present and has the volunteer in his or her line of sight.

The Presbytery of Florida requires a Level 2 VECHS background check and screening via the Dru Sjodin National Sex Offender Public website.

More information related to Summer Camp requirements may be accessed at:

<https://www.myflfamilies.com/services/child-and-family-services/child-care/summer-camp-screening-requirements>

### **Expectations for Persons Working with or in Close Proximity to Minors and/or Vulnerable Adults**

It is the policy of the Presbytery of Florida to provide events free of any form of sexual abuse and misconduct, including sexual intimidation by any volunteer or Presbytery employee. Sexual abuse/ misconduct, in any form, is unacceptable behavior and is subject to disciplinary action. Sexual abuse, sexual misconduct, and sexual harassment include, but are not limited to, unwelcome and unsolicited sexual advances, requests for sexual favors, discriminatory torment based on gender or sexual preference,

and other undesirable verbal, visual, or physical conduct of a sexual nature, manifested in person or via any type of digital media.

In particular, sexual abuse and/or misconduct has occurred if:

- submission to any kind of sexual abuse/misconduct is an explicit or implicit term or condition of participation in an event;
- submission to, or rejection of, sexually harassing behavior is used as the basis of employment or other personnel decisions affecting the victim of the behavior;
- sexual abuse/misconduct has the purpose or effect of unreasonably interfering with the victim's participation in an event or creating an intimidating, hostile, or offensive environment.

Any Presbytery employee or volunteer who believes, in good faith, that there has been a violation of this policy should report the perceived violation as soon as possible. If the perceived violation occurs during a Presbytery-sponsored event, the matter must be reported immediately to the coordinator of the event and the Equipping Presbyter/Stated Clerk for action in accordance with the Presbytery's policy and procedures on sexual abuse/misconduct.

### **Mandatory Event Rules for Working With Minors and Vulnerable Adults**

The Presbytery of Florida shall ensure that the following measures are in place for each event or activity of the Presbytery involving minors/vulnerable adults.

1. Supervision: There will always be one (1) and, when feasible, two (2) adult workers present in groups of minors/vulnerable adults.
2. Ratios: The adult to minor ratio for events is a minimum of two adults for every 17 minors. There shall also be at least one adult of each gender when there is more than one gender in a group. Only in emergency situations may the ratio and gender diversity be compromised.
3. View windows and open doors: When minors/vulnerable adults are in a room with adult workers or volunteers and the door is closed, the door must have a view window installed. If no view window is installed in the door, the door must remain open at all times.
4. Adult workers/caregivers should respect the privacy of the minors/vulnerable adults to whom they provide care. Responsible use of digital devices and cell phones is required in all situations (e.g., taking age-appropriate photographs and movies; not taking photographs of minors/vulnerable adults who are not fully clothed). Adults and minors are required at all times to wear appropriate attire. Training is to be provided to understand age-appropriate behaviors that need to be reported to a caregiver or leader of the event.
5. All volunteers and employees at any Presbytery-sponsored event must also abide by a code of conduct that recognizes the following behaviors as prohibited. Some of these prohibited behaviors include, but are not limited to:
  - a. Display of sexual affection toward a minor/vulnerable adult
  - b. Use of profanity
  - c. Discussion of sexual encounters with or around minors/vulnerable adults or in any way involving minors/vulnerable adults in personal problems or issues
  - d. Dating or becoming romantically involved with minors or vulnerable adults
  - e. Using or being under the influence of alcohol or illegal drugs in the presence of

minors/vulnerable adults

- f. Possessing sexually-oriented materials – including printed or online – at such an event
- g. Telling a minor/vulnerable adult to keep something secret
- h. Staring at or commenting on others' bodies
- i. Initiating inappropriate digital communication with minors/vulnerable adults
- j. Working one-on-one with minors/vulnerable adults in a private setting
- k. Abusing minors/vulnerable adults in any way; including, but not limited to, the following:
  - 1) Physical abuse: hit, spank, shake, slap, unnecessarily restrain
  - 2) Verbal abuse: degrade, threaten, or curse
  - 3) Sexual abuse: expose oneself, or engage in sexually-oriented conversations
  - 4) Shame, humiliate, act cruelly toward others
  - 5) Neglect: withhold food, water, shelter
- l. Permitting minors/vulnerable adults to engage in hazing, bullying, derogatory name-calling, ridicule, humiliation, or sexual activity

### **Allegation Reporting**

- All adults working with or in close proximity to minors/vulnerable adults are to be completely familiar with the procedures for reporting alleged abuse. See <https://www.flsenate.gov/Laws/Statutes/2018/39.201> to read the State of Florida mandates for reporting allegations of abuse.
- Anyone aware of inappropriate behavior involving a minor/vulnerable adult, regardless of where the conduct occurred, must immediately report the questionable activity to the event coordinator.
- If an incident is witnessed or reported, that person must first secure the safety of the minor/vulnerable adult, calling 911, if necessary. The minor/vulnerable adult should not be left alone.
- The coordinator is to immediately notify the Equipping Presbyterian/Stated Clerk and should then contact the Florida Division of Children and Families (DCF) at **1-800-962-2873** (DCF Abuse Hotline). Other information regarding reporting is available at <https://www.myflfamilies.com/services/abuse/abuse-hotline>. A report sent to the Stated Clerk constitutes an allegation that must be investigated in accordance with the PCUSA Book of Order.
- The person who observed the offense or who initially learned of it or was contacted by the alleged victim should immediately fill out a written report using the attached Incident Report form.
- The Presbytery will maintain a readily available list of agencies to be contacted.
- The event coordinator shall have "Incident Report" forms available at the event.
- If an accusation by an individual who attended a Dogwood Acres camp or conference is made after the camp season is over, it shall be directed to the Director of Dogwood Acres and the moderator of MDWA, who will then report it to the Equipping Presbyterian/Stated Clerk.

A Pastoral Response Team, trained and available through the Ministry of Congregational and Pastoral Care, shall be initiated by the Equipping Presbytery/Stated Clerk through the moderator of MCPC. This Team will then follow its prescribed responsibilities to support all parties throughout the process.

## INCIDENT REPORT – PRESBYTERY OF FLORIDA

Phone: 850-535-2335

Please use this form to report incidents of injury, medical emergencies, significant camper misbehavior, sexual abuse/misconduct, workplace/sexual harassment, or endangerment of minors/vulnerable adults. If possible, a report should be completed within 24 hours of the event. Reports of sexual abuse/misconduct have no time limit.

**Danger or medical emergency?** Call **911** immediately and stay with/near the victim.

**Minor or vulnerable adult endangerment?** Call the Florida DCF Hotline **1-800-962-2873**.

Submit the completed form directly to:

**Dogwood Acres incidents:** [staff@dogwoodacres.org](mailto:staff@dogwoodacres.org)

**All other Presbytery incidents:** Assistant Stated Clerk via [Incident@presbyteryofflorida.com](mailto:Incident@presbyteryofflorida.com)

A **fillable version** of this form is available at: <https://www.presbyteryofflorida.net/resources/>

Date of Report: [Date]

### REPORTING PERSON

Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

### INVOLVED PERSON/S

3. Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

4. Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

**If more space is required, attach additional sheet with contact information as above.**

### INCIDENT TYPE

- |                                                              |                                                                   |
|--------------------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> Injury                              | <input type="checkbox"/> Sexual Abuse/Misconduct                  |
| <input type="checkbox"/> Behavioral                          | <input type="checkbox"/> Workplace/Sexual Harassment              |
| <input type="checkbox"/> Medical                             | <input type="checkbox"/> Endangerment of Minors/Vulnerable Adults |
| <input type="checkbox"/> Other Incident: [Brief Description] |                                                                   |

## INCIDENT DETAILS

Date of Incident: [Date]      Time: [Time] ☐ AM ☐ PM

Location of Incident: [Location]

Describe the Incident: [Describe the Incident]

Action Taken: [Action Taken]

## INJURIES

Was anyone injured? ☐ Yes ☐ No

If yes, describe the injuries: [Description of Injuries]

## WITNESSES

Were there witnesses to the incident? ☐ Yes ☐ No

If yes, enter the witnesses' names and contact info: [Name(s) / Contact Info]

## POLICE / MEDICAL SERVICES

Police Notified? ☐ Yes ☐ No      If yes, was a report filed? ☐ Yes ☐ No

Was medical treatment provided? ☐ Yes ☐ No ☐ Refused

If yes, where was medical treatment provided? ☐ On-site ☐ Hospital ☐ Other: [Other]

## PERSON FILING REPORT

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

Print Name: \_\_\_\_\_

## OFFICE USE ONLY

Report received by : [Name] Date: [Date]

Follow-up action:

Action Taken: [Describe]

# **Sexual Abuse and Misconduct Policy**

*Adopted by the Presbytery of Florida on May 16, 2026*

*Next review: August 2027*

## **SECTION I – Introduction**

The Presbytery of Florida, Inc. [hereafter, the Presbytery] recognizes and affirms that all church members, officers, nonmember employees, and volunteers of governing bodies and entities of the Presbyterian Church (USA) [hereafter, PC (USA)] are to maintain the Church's integrity at all times. Sexual abuse and misconduct are not only a violation of the principles set forth in Scripture, but also of the ministerial, pastoral, employment, and professional relationship with the Church. It is never condoned. The Presbytery adopts the following guidelines for defining sexual abuse and misconduct, establishing orderly procedures for dealing with allegations and accusations of sexual abuse and misconduct by those persons who are subject to its jurisdiction.

Upon adoption by the Presbytery, this policy may be used as a model or standard by sessions and congregations developing their own policies for dealing with allegations of sexual abuse and/or misconduct within the local session's jurisdiction.

Training relative to this policy shall be required at least every thirty-six months for:

1. Teaching Elders and Commissioned Ruling Elders (CREs) serving congregations;
2. Teaching Elders in validated ministries;
3. Certified Christian Educators;
4. Teaching Elders and Ruling Elders elected to Presbytery service;
5. Candidates for ministry; and
6. Presbytery staff.

## **SECTION II – Standards And Definitions**

### **A. Standards of Conduct and Definitions:**

1. Sexual abuse and misconduct within the church violate the role of those called to ordered ministry, employees, volunteers, counselors, supervisors, teachers, and advisors of any kind who are called upon to exercise integrity, sensitivity, and caring in a trust relationship (G-4.0301). Sexual abuse constitutes a misuse of authority and power that breaches Christian ethical principles by exploiting a trust relationship to gain advantage over another for personal pleasure in an abusive and unjust manner.
2. Sexual Abuse is the comprehensive term used in these guidelines to include:
  - a. **Child Sexual Abuse**, which includes, but is not limited to, any contact or interaction between a child and an adult when the child is being used for the sexual stimulation of the adult person or of a third person. The behavior may or may not involve touching. Sexual behavior between a child under the age of 18 and an adult is always considered forced, whether or not consented to by the child.
  - b. **Sexual Harassment**, which is unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:
    - Submission to such conduct is made either explicitly or implicitly a term or a condition of an individual's employment or their continued status in an institution;
    - Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting that individual; or

- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance by creating an intimidating, hostile, or offensive working environment.
- c. **Sexual Malfeasance**, which is sexual conduct within a ministerial relationship (e.g., pastor with a member of the congregation) or professional relationship (e.g., employee with a person of authority; Equipping Presbyterian/Stated Clerk with a ministry member). If a congregant, student, client, or employee initiates or invites sexual content in the relationship, it is the responsibility of the pastor, church officer, teacher, or other supervisor to maintain the appropriate role and prohibit a sexual relationship. This definition is not meant to cover relationships between spouses, nor is it meant to restrict church professionals from having normal, mutual, social, intimate, or marital relationships.
- d. **Rape or Sexual Battery**, which is sexual contact by force, threat, or intimidation.
- e. **Sexual Misconduct**, which is offensive, obscene, suggestive language, or behavior that involves unwelcomed touching or fondling that is injurious to the physical, mental, or emotional health of another when committed by a person in a position of trust.

### SECTION III – Reporting Requirements

1. The Presbytery regards any allegation of sexual abuse as a grave matter. In responding to allegations of sexual abuse, the Church shall seek healing and shall assure the protection of all persons. To the maximum extent possible, the privacy of all persons shall be respected and confidentiality of communications assured to every degree possible.
2. The PC(USA) assures all persons of fair procedures in the disciplinary process through the provisions of the *Book of Order*. These procedures shall be referenced and available throughout the handling of the allegation(s), even before the initiation of formal proceedings.
3. The Presbytery will treat any written statement alleging sexual abuse as initiating a disciplinary case and will respond according to procedures in accordance with the *Book of Order*. Certain cases may require special handling, such as those involving accusation of child abuse or in situations where more than one governing body of the PC(USA) is involved. (D-7.0102; also D-7.0201d and e)
4. Mandatory Reporting (G-4.0302): “Any member of this church engaged in ordered ministry and any certified Christian educator employed by this church or its congregations, shall report to ecclesiastical and civil legal authorities knowledge of harm, or the risk of harm, related to the physical abuse, neglect, and/or sexual molestation or abuse of a minor or an adult who lacks mental capacity when
  - (1) such information is gained outside of a confidential communication as defined in G-4.0301,
  - (2) she or he is not bound by an obligation of privileged communication under law, or
  - (3) she or he reasonably believes that there is risk of future physical harm or abuse.”
5. **Reporting to the Presbytery:** Reports should be made immediately to the Equipping Presbyterian/Stated Clerk of the Presbytery or, if the Equipping Presbyterian/Stated Clerk is the accused, to the Assistant Stated Clerk who will report the matter immediately to the Stated Clerk, Synod of South Atlantic. Reports may initially be given verbally, but must then be provided in written form. An Incident Report is attached to this policy as guidance regarding the details that should be included in the written report. A report sent to the Stated Clerk constitutes an allegation that must be investigated in accordance with the PCUSA Book of Order.

6. Reporting to Civil Authorities: Everyone is a mandated reporter. Mandated reporters are required to call 911, if a threat remains, and then the hotline. If the victim is in immediate danger, call 911 immediately, before reporting it to any other authority. If the victim is safe, immediately call the **Florida Sexual Abuse Hotline** at **1 (888) 956-7273**. Local civil authorities should then be contacted, per guidance via the Hotline.

Civil and Presbytery investigations may proceed concurrently, as appropriate to the specific parameters of a given situation.

#### **SECTION IV – Pastoral Response Team**

A Pastoral Response Team, trained and available through the Ministry of Congregational and Pastoral Care, shall be initiated by the Equipping Presbytery/Stated Clerk through the moderator of MCPC. This Team will then follow its prescribed responsibilities to support all parties throughout the process.

## INCIDENT REPORT – PRESBYTERY OF FLORIDA

Phone: 850-535-2335

Please use this form to report incidents of injury, medical emergencies, significant camper misbehavior, sexual abuse/misconduct, workplace/sexual harassment, or endangerment of minors/vulnerable adults. If possible, a report should be completed within 24 hours of the event. Reports of sexual abuse/misconduct have no time limit.

**Danger or medical emergency?** Call **911** immediately and stay with/near the victim.

**Minor or vulnerable adult endangerment?** Call the Florida DCF Hotline **1-800-962-2873**.

Submit the completed form directly to:

**Dogwood Acres incidents:** [staff@dogwoodacres.org](mailto:staff@dogwoodacres.org)

**All other Presbytery incidents:** Assistant Stated Clerk via [Incident@presbyteryofflorida.com](mailto:Incident@presbyteryofflorida.com)

A fillable version of this form is available at: <https://www.presbyteryofflorida.net/resources/>

Date of Report: [Date]

### REPORTING PERSON

Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

### INVOLVED PERSON/S

5. Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

6. Full Name: [Name]

Address: [Address]

Phone: [Phone Number]

E-Mail: [Email Address]

**If more space is required attach additional sheet with contact information as above.**

### INCIDENT TYPE

☐ Injury

☐ Sexual Abuse/Misconduct

☐ Behavioral

☐ Workplace/Sexual Harassment

☐ Medical

☐ Endangerment of Minors/Vulnerable Adults

☐ Other Incident: [Brief Description]

### INCIDENT DETAILS

Date of Incident: [Date]      Time: [Time] ☐ AM ☐ PM

Location of Incident: [Location]

Describe the Incident: [Describe the Incident]

Action Taken: [Action Taken]

### INJURIES

Was anyone injured? ☐ Yes ☐ No

If yes, describe the injuries: [Description of Injuries]

### WITNESSES

Were there witnesses to the incident? ☐ Yes ☐ No

If yes, enter the witnesses' names and contact info: [Name(s) / Contact Info]

### POLICE / MEDICAL SERVICES

Police Notified? ☐ Yes ☐ No      If yes, was a report filed? ☐ Yes ☐ No

Was medical treatment provided? ☐ Yes ☐ No ☐ Refused

If yes, where was medical treatment provided? ☐ On-site ☐ Hospital ☐ Other: [Other]

## PERSON FILING REPORT

Signature: \_\_\_\_\_

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

Print Name: \_\_\_\_\_

## OFFICE USE ONLY

Report received by : [Name] Date: [Date]

Follow-up action:

Action Taken: [Describe]

# **Workplace and Sexual Harassment Policy**

*Adopted by the Presbytery of Florida on May 16, 2026*  
*Next review: August 2027*

## **Introduction**

The Presbytery of Florida is committed to maintaining a workplace free from sexual and other forms of harassment. Workplace harassment is against the law and violates the teachings of Christ. All persons have a right to a workplace free from harassment, including harassment based on age, race, faith, color, ethnicity, national origin, sexual orientation, sex, disability, marital status, and gender identity. All Presbytery employees, volunteers, contractors, and others conducting business with the Presbytery must work in a manner that avoids harassment in the workplace.

This policy is one component of the Presbytery's commitment to a harassment-free work environment. Employees, volunteers, contractors, and others doing business with the Presbytery are urged to report workplace harassment by filing a complaint with the Presbytery of Florida. A complaint may also be filed with the appropriate agency or civil authority.

Upon adoption by the Presbytery, this policy may be used as a model or standard by sessions and congregations developing their own policies for dealing with allegations of workplace and sexual harassment within the local session's jurisdiction.

Training relative to this policy shall be required at least every thirty-six months for:

1. Teaching Elders and Commissioned Ruling Elders (CREs) serving congregations;
2. Teaching Elders in validated ministries;
3. Certified Christian Educators;
4. Teaching Elders and Ruling Elders elected to Presbytery service;
5. Candidates for ministry; and
6. Presbytery staff.

## **Policy:**

1. The Presbytery's policy applies to all employees, volunteers, contractors, and other persons conducting business with the Presbytery. In the remainder of this document, the term "employees" refers to this collective group. The Presbytery of Florida will hereafter be referenced as "the Presbytery."
2. Harassment in any form will not be tolerated. Any individual covered by this policy who engages in sexual or other harassment or retaliation will be subject to remedial and/or disciplinary action (e.g., counseling, suspension, termination).
3. Workplace harassment is a form of discrimination, offensive, a violation of our policies, unlawful, and contrary to the teachings of Christ. It could also subject the Presbytery to liability for harm to its victims. Harassers may also be individually liable. Employees and others who engage in workplace harassment, including sexual harassment, or who allow such behavior to continue, will be penalized.
4. Unlawful workplace harassment is not limited to the physical workplace or event, itself, nor is it limited to work or event hours.
5. The Presbytery will respond to all complaints of sexual harassment in accordance with the *Book of*

*Order.* The Presbytery will keep the investigation confidential to the extent possible. All employees, as defined in Section 1, are expected to cooperate with investigations into sexual and workplace harassment.

6. Employees are **required** to report all complaints they receive, or any harassment that they observe or become aware of, to the Equipping Presbyter/Stated Clerk of the Presbytery. The Presbytery will provide all employees with a complaint form for reporting an incident of harassment.
7. **Retaliation Prohibition:** No person covered by this policy shall be subject to adverse action for reporting an incident of harassment, providing information, or otherwise assisting in any investigation of a harassment complaint. The Presbytery will not tolerate retaliation against anyone who, in good faith, reports or provides information about suspected harassment. Any Presbytery employee who retaliates against anyone involved in a harassment investigation will be subjected to disciplinary action, up to and including termination. All employees who believe they have been subject to such retaliation should inform a supervisor, manager, or the Equipping Presbyter/Stated Clerk of the Presbytery. All employees who believe they have been targeted of such retaliation may also seek relief in other available forums, as noted in the Legal Protections section below.
8. This policy must be provided to all employees, posted on the website, and posted prominently at all work locations to the extent practicable. It must also be included in the Presbytery Handbook of Operations.

### **What is “Workplace Harassment?”**

Workplace harassment includes, but is not limited to, the following:

**Nonverbal behavior**, including distribution, display, or discussion of any written or graphic material that ridicules, denigrates, insults, belittles, or shows hostility, aversion, or disrespect toward an individual or group because of national origin, race, color, religion, age, gender, sexual orientation, pregnancy, appearance, disability, sexual identity, marital, or other protected status

**Offensive or unwelcome comments**, including epithets, slurs, taunting, purposeful lies, or negative stereotyping about a person’s nationality, origin, race, color, religion, gender, sexual orientation, age, body, and/or disability

**Hostile environments** that create an offensive or unpleasant work or worship environment through the use of epithets, slurs, taunting, purposeful lies, or negative stereotyping, delivered in person or through social media or other means

For a claim of hostile work environment, such conduct must be subjectively abusive and objectively severe and pervasive enough to create a work environment that a reasonable person would find hostile or abusive. Several factors are considered to determine whether the conduct is severe and pervasive: frequency and severity of the conduct, whether it was physically threatening, humiliating, or an offensive utterance; whether it unreasonably interfered with work performance or the victim’s psychological well-being; and whether the harasser was a superior in the organization. None of these are necessarily conclusive alone, but rather are to be used as factors in making a determination.

The definition of workplace harassment does not include reasonable challenges to work performance or negative job-related feedback, nor does it apply to reasonable discussions or respectful expressions of opinion about various convictions or beliefs.

### **What is “Sexual Harassment?”**

Sexual harassment includes unwelcome conduct that is either of a sexual nature or directed at an individual because of that individual’s sex when:

- Such conduct has the purpose or effect of unreasonably interfering with an individual’s work performance or creating an intimidating, hostile, or offensive work environment, even when the reporting individual is not the intended target of the sexual harassment;
- Such conduct is made either explicitly or implicitly a term or condition of employment or service; or
- Submission to or rejection of such conduct is used as the basis for decisions that affect an individual’s employment or service.

A sexually hostile work environment includes, but is not limited to, words, signs, jokes, pranks, intimidation, or physical violence of a sexual nature, or that are directed at an individual because of that individual’s sex. Sexual harassment also consists of:

- any unwanted verbal or physical advances;
- sexually-explicit derogatory statements; or
- sexually discriminatory remarks made by someone that are offensive or objectionable to the recipient, cause the recipient discomfort or humiliation, or interfere with the recipient’s or another’s job performance.

Sexual harassment also occurs when a person in authority attempts to trade job benefits for sexual favors. This can include hiring, promotion, continued employment/service, or any other terms, conditions, or privileges of employment/service. This is also called “quid pro quo” harassment.

An employee who feels harassed should report it so that any violation of this policy can be corrected promptly. Any sexually-oriented harassing conduct, even a single incident, can and shall be addressed under this policy.

### **Examples of Sexual Harassment**

The following list includes, but is not limited to, acts that may be deemed as sexual harassment:

- Physical acts of a sexual nature, such as:
  - Touching, pinching, patting, kissing, hugging, grabbing, poking, or brushing against another employee’s body;
  - Rape, sexual battery, molestation, or attempts to commit these assaults
- Unwanted sexual advances or propositions, such as:
  - Subtle or obvious pressure for unwelcome sexual activities;
  - Sexual grooming or requests for sexual favors accompanied by implied or overt threats regarding the target’s job performance evaluation, a promotion or other job benefits or detriments.
- Sexually-oriented gestures, noises, remarks, jokes, or comments about a person’s sexuality, sexual

appeal, or sexual experience

- Sex stereotyping, when conduct, personality traits, or physical characteristics may not conform to other people's perceptions about how individuals of a particular sex should act or look
- Sexual or discriminatory displays or publications anywhere in the workplace, such as pictures, posters, calendars, graffiti, objects, promotional materials, reading materials, or other materials that any observer finds sexually demeaning or pornographic, including such sexual displays on workplace computers or cell phones, or sharing such displays while in the workplace
- Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity, or transgender status, such as:
  - Interfering with, destroying, or damaging a person's workstation, tools or equipment, or otherwise interfering with the individual's ability to perform the job;
  - Sabotaging an individual's work; or
  - Bullying, yelling, or name-calling

## **Retaliation**

Unlawful retaliation is any action that could discourage a worker from coming forward to file or support a harassment claim. Adverse action need not be job-related or occur in the workplace to constitute unlawful retaliation.

Protected activity occurs when a person has:

- filed a complaint of workplace harassment, either to the Presbytery or to a civil authority;
- testified or assisted in a proceeding involving workplace harassment;
- opposed workplace harassment by making a verbal or informal complaint to the Presbytery or a higher council;
- reported that another employee has been harassed; or
- encouraged a fellow employee to report harassment.

Even if the alleged harassment does not rise to the level of a violation of law, the individual is protected from retaliation if the person had a good faith belief that the practices were unlawful and immoral. The retaliation provision is not intended to protect persons making intentionally false charges of harassment.

## Reporting Workplace Harassment

**Preventing and reporting harassment is everyone's responsibility.** The Presbytery cannot address harassment unless it is aware of it. An employee who has observed or been subjected to behavior that may constitute harassment is morally obligated to report such behavior to the Equipping Presbyter/Stated Clerk or, if the Equipping Presbyter/Stated Clerk is the accused, to the Assistant Stated Clerk who will report the matter immediately to the Stated Clerk, Synod of South Atlantic.

Reports of harassment may initially be made verbally, but must be subsequently filed in writing in accordance with D-4.0102 and D-7.02. A form for filing a written complaint is attached to this policy and available on the Presbytery website.

## Supervisory Responsibilities

Upon receiving a complaint or information about suspected/alleged harassment, observing what may be harassing behavior, or suspecting that harassment is occurring, all moderators in the Presbytery are **required** to report such suspected harassment to the Equipping Presbyter/Stated Clerk of the Presbytery or, if the Equipping Presbyter/Stated Clerk is the accused, to the Assistant Stated Clerk who shall report the matter immediately to the Stated Clerk, Synod of South Atlantic.

Individuals who fail to report suspected harassment or otherwise knowingly allow it to continue will be subject to discipline. They may also be subject to discipline for engaging in retaliation.

## Complaint and Investigation of Harassment

**All** written reports sent to the Stated Clerk constitute an allegation and must be fully investigated. Investigations will be conducted in accordance with the *Book of Order*, either as a remedial complaint, if filed against a congregation, committee, or commission (D-4.0102, D-4.02); or as a disciplinary process, if filed against an individual (D-7.0102, D-7.02).

## Contacting Legal Authorities

In accordance with G-4.0302 and D-7.0501, if harassment of a minor or an adult who lacks mental capacity is alleged, or if the alleged harassment involves unwanted physical touching, coerced physical confinement, or coerced sex acts, any member of the Presbyterian Church (U.S.A.) engaged in ordered ministry, and any certified Christian educator working within or for the Presbytery or its congregations, shall report such conduct to ecclesiastical and civil legal authorities.

## INCIDENT REPORT – PRESBYTERY OF FLORIDA

Phone: 850-535-2335

Please use this form to report incidents of injury, medical emergencies, significant camper misbehavior, sexual abuse/misconduct, workplace/sexual harassment, or endangerment of minors/vulnerable adults. If possible, a report should be completed within 24 hours of the event. Reports of sexual abuse/misconduct have no time limit.

**Danger or medical emergency?** Call **911** immediately and stay with/near the victim.

**Minor or vulnerable adult endangerment?** Call the Florida DCF Hotline **1-800-962-2873**.

Submit the completed form directly to:

**Dogwood Acres incidents:** [staff@dogwoodacres.org](mailto:staff@dogwoodacres.org)

**All other Presbytery incidents:** Assistant Stated Clerk via [Incident@presbyteryofflorida.com](mailto:Incident@presbyteryofflorida.com)

A fillable version of this form is available at: <https://www.presbyteryofflorida.net/resources/>

Date of Report: [Date]

### REPORTING PERSON

Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

### INVOLVED PERSON/S

7. Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

8. Full Name: [Name] Address: [Address]

Phone: [Phone Number] E-Mail: [Email Address]

**If more space is required attach additional sheet with contact information as above.**

### INCIDENT TYPE

- |                                                              |                                                                   |
|--------------------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> Injury                              | <input type="checkbox"/> Sexual Abuse/Misconduct                  |
| <input type="checkbox"/> Behavioral                          | <input type="checkbox"/> Workplace/Sexual Harassment              |
| <input type="checkbox"/> Medical                             | <input type="checkbox"/> Endangerment of Minors/Vulnerable Adults |
| <input type="checkbox"/> Other Incident: [Brief Description] |                                                                   |

### INCIDENT DETAILS

Date of Incident: [Date]      Time: [Time] ☐ AM ☐ PM

Location of Incident: [Location]

Describe the Incident: [Describe the Incident]

Action Taken: [Action Taken]

### INJURIES

Was anyone injured? ☐ Yes ☐ No

If yes, describe the injuries: [Description of Injuries]

### WITNESSES

Were there witnesses to the incident? ☐ Yes ☐ No

If yes, enter the witnesses' names and contact info: [Name(s) / Contact Info]

### POLICE / MEDICAL SERVICES

Police Notified? ☐ Yes ☐ No      If yes, was a report filed? ☐ Yes ☐ No

Was medical treatment provided? ☐ Yes ☐ No ☐ Refused

If yes, where was medical treatment provided? ☐ On-site ☐ Hospital ☒ Other: [Other]

## PERSON FILING REPORT

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

Print Name: \_\_\_\_\_

## OFFICE USE ONLY

Report received by : [Name] Date: [Date]

Follow-up action:

Action Taken: [Describe]

## Glossary

**Accused** is the term used to represent the person against whom a claim of sexual misconduct is made.

**Accuser/Victim** is a term used to represent the person claiming knowledge of sexual misconduct by a person covered by these guidelines or a person claiming to have been abused by a person covered under this policy. An individual, such as a family member, friend, or colleague, may be the accuser.

**Church** when spelled with the initial capitalized refers to the Presbyterian Church (U.S.A.). Church, when spelled with the initial in lowercase, refers to a local church. The word congregation is used loosely for members and other participants.

**Employee** is the comprehensive term used to cover individuals who are hired or called to work for the Church for salary or wages.

**Entity** is the term used to refer to any program or office managed by a board, ministry, council, or other body whose membership is elected by the Presbytery.

**Inquiry** is the term used in the Rules of Discipline to determine whether charges should be filed based upon allegations of an offense received by a governing body (Cf. D-10.0201).

**Pastoral Response Team** (PRT) is a body constituted by the Presbytery to facilitate the process of providing a pastoral response to allegations of sexual abuse by persons covered under these guidelines. The structure and function of the PRT are detailed in Section IV of this report.

**Persons Covered** by this policy include church members, church officers, ministers, and nonmembers who are employees or volunteers under the supervision of the Presbytery or its entities, including those who are accused of sexual abuse under circumstances in which (1) access to the accuser/victim is related to some form of service to or appointment by the Presbytery or its entities or (2) sexual abuse in a non-church-related setting which raises questions of character for the Church.

**Reasonable Suspicion** is a subjective criterion that refers to a belief or opinion based on facts or circumstances of sexual abuse that are sufficient enough for a prudent person to want to inquire further, to take protective action, or report to authorities.

**Response** is the action taken by the Presbytery or entities when a report of sexual misconduct is received. It may include (1) inquiry into facts and circumstances, (2) possible disciplinary action (administrative or judicial or both), (3) pastoral care for accuser/victims and their families and others, and (4) pastoral care and rehabilitation for the accused and care for their families.

**Volunteer** is the term used for those who provide services for the Presbytery and entities of the Church and receive no benefits or remuneration. Volunteers include persons elected or appointed to serve on boards, ministries, and other groups. For purposes of these guidelines, volunteers are treated the same as employees. Liabilities of the Presbytery or its entities may be the same for volunteers as for employees.

# **REVITALIZATION GRANTS**

# **PRESBYTERY OF FLORIDA**

## **EMERGENCY REPAIRS GRANT**

### **INITIAL CRITERIA**

As Presbyterians, we are part of a connectional system. We work together and are a part of one another's others' lives. When a grant request is submitted, several initial criteria will weigh heavily in determining the merits of the request:

- Have members of the congregation been serving on committees of the Presbytery?
- Has the session been faithful in sending commissioners to attend Presbytery meetings?
- Has the congregation been faithful in financially supporting the work and ministry of the Presbytery?
- A copy of the congregation's financial budget and holdings will be required for all but the Mini-Grant.
- At least two (2) estimates will be required for the Emergency Repair Grant.

### **SOURCE OF FUNDS**

There arise occasions when a congregation within the Presbytery of Florida has fulfilled its ministry to our Lord. The completion of that ministry is celebrated at a time of worship and thanksgiving for the work accomplished. But the influence of that congregation—its assistance and aid to its sister churches—is not completely over, even though its doors have closed.

As is the policy of the Presbyterian Church (U.S.A.), the Presbytery is responsible for the disposition of the church property (G-4.0205). Funds received from the sale of the property are used to give witness to the connectional nature of our denomination and further the work of our Lord in our sister congregations and the Presbytery of Florida.

In 2025, the Presbytery of Florida passed the following in order to spread the funds in such a way as to best serve the Presbytery:

“After the equivalent of one half of the current year's budget is set aside, which can be used to zero-balance the current year's budget before closing the books for that year,

- 5% - Special, unbudgeted Presbytery projects
- 19% - Ministry on Congregational and Pastoral Care
- 19% - Ministry on New Congregational Development
- 19% - Dogwood Acres
- 19% - UKirk, Tallahassee
- 19% - Staff Support
- Any growth in the Reserve Fund shall be distributed *pro rata*.

Resources have been assigned to the MCPC through investments made possible from the sale of the properties of churches whose congregations have concluded their ministries. With the approval from Presbytery, the maximum amount to be invested will be no more than \$500,000, the interest of which will be used to assist qualified projects and requests for support.

# EMERGENCY REPAIRS

## DEFINITIONS AND EXPECTATIONS

### Purpose

The Presbytery of Florida has established a Congregational Revitalization Fund to provide grants to its congregations with small membership in support of a congregation's specific plan for its revitalization. The awarding of grants will be based on a demonstrated need to do urgent repairs that will lead toward renewed and refocused avenues for ministry and increased safety for all.

### Administration

The fund shall be administered, and grants awarded by, the Ministry of Congregational and Pastoral Care (MCPC). ***All grants, if approved by MCPC, are considered to be matching grants up to the amount specified in this policy. Grants may be applied for once every 18 months.***

### Definitions

- ***Small Congregation:*** While the definition of what constitutes a small congregation may vary, in the Presbytery of Florida, it is generally considered to refer to congregations with an average weekly worship attendance of fewer than 50 persons.
- ***Emergency:*** Circumstances that pose an immediate and significant risk to further damage, if not rectified quickly; matters that are a risk to safety or health
- ***Repairs:*** Not new construction, unless needed to reduce a risk to safety or health issues, or to prevent further damage to the facility

### Evaluation

Within three months of receiving this grant, a report on the completion (or continuing progress) of the repairs will be submitted to MCPC for its review. Failure to do so will potentially disqualify a congregation from receiving future grants.

# EMERGENCY REPAIRS GRANT APPLICATION

(A fillable version of this form is available on the Presbytery website.)

Congregation Name: \_\_\_\_\_ PIN: \_\_\_\_\_

Address: \_\_\_\_\_

Session Clerk: \_\_\_\_\_ Session Moderator: \_\_\_\_\_

Contact Person for Grant: \_\_\_\_\_

Address: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home/Work Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Congregation Membership: \_\_\_\_\_ Average Weekly Worship Attendance: \_\_\_\_\_

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1. For what repair(s) are you seeking a grant? (Please be specific. Attach photos when possible.) \_\_\_\_\_

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2. Amount requested from MCPC? \_\_\_\_\_ (It is understood the congregation will match this amount.)  
Please attach the latest copy of the congregation's financial budget and holdings.

3. How will the repairs enhance the revitalization process of your congregation's ministry? \_\_\_\_\_

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4. In the past three years, how have members of the congregation been involved with various aspects of the Presbytery? \_\_\_\_\_

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5. Please attach at least two estimates for needed emergency repairs.

*(See next page)*

The session of \_\_\_\_\_ met on \_\_\_\_\_ and voted  
(church) (date)  
affirmatively on this matter, fully understanding the expectations of this request.

Signed:

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

# **PRESBYTERY OF FLORIDA**

## **EQUIPMENT GRANT**

### **DEFINITIONS AND EXPECTATIONS**

#### **Purpose**

The Presbytery of Florida has established a Congregational Revitalization Fund to provide grants to its congregations with small membership in support of a congregation's specific plan for its revitalization. The awarding of grants will be based on a demonstrated need to update/upgrade equipment used in worship and/or educational opportunities that will lead toward renewed and refocused avenues for ministry.

#### **Administration**

The fund shall be administered, and grants awarded by, the Ministry of Congregational and Pastoral Care (MCPC). *All grants, if approved by the MCPC, are considered to be matching grants up to the amount specified in this policy. Grants may be applied for once every 18 months.*

#### **Definitions**

- ***Small Membership Congregations:*** While the definition of what constitutes a small congregation may vary, in the Presbytery of Florida, it is generally considered to refer to congregations with an average weekly worship attendance of fewer than 50 persons.
- ***Demonstrated Need:*** How the lack of the needed equipment, or out-dated equipment, has hindered forward progress of ministry
- ***Equipment:*** Those tangible items used to enhance the worship and educational experience, (e.g., audio-visual devices) of the congregation

#### **Evaluation**

Within the first six months of receiving the grant, an accounting of the equipment's use and effectiveness in helping revitalize the focus and practice of ministry will be submitted by the session for review by MCPC. Failure to do so will potentially disqualify a congregation from receiving future grants.

# EQUIPMENT GRANT APPLICATION

(A fillable version of this form is available on the Presbytery website.)

Congregation Name: \_\_\_\_\_ PIN: \_\_\_\_\_

Address: \_\_\_\_\_

Session Clerk: \_\_\_\_\_ Session Moderator: \_\_\_\_\_

Contact Person for Grant: \_\_\_\_\_

Address: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home/Work Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Congregation Membership: \_\_\_\_\_ Average Weekly Worship Attendance: \_\_\_\_\_

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1. For what item(s) are you seeking a grant? (Please be specific) \_\_\_\_\_  
\_\_\_\_\_
2. Amount requested from MCPC? \_\_\_\_\_ (It is understood the congregation will match this amount.) Please attach the latest copy of the congregation's financial budget and holdings.
3. What will this item replace? \_\_\_\_\_  
\_\_\_\_\_
4. Where and how will this item be utilized? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
How frequently? \_\_\_\_\_
5. What role will it play in revitalizing the life and ministry of the congregation? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. What are the anticipated results to be achieved by using this item? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. In the past three years, how have members of the congregation been involved with various aspects of the Presbytery? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*(See next page)*

The session of \_\_\_\_\_ met on \_\_\_\_\_ and voted  
(church) (date)  
affirmatively on this matter, fully understanding the expectations of this request.

Signed:

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

## PRESBYTERY OF FLORIDA

### PASTORAL LEADERSHIP GRANT DEFINITIONS AND EXPECTATIONS

#### Purpose

The Presbytery of Florida has established a Congregational Revitalization Fund to provide grants to its congregations with small membership in support of a congregation's specific plan for its revitalization. The awarding of a grant will be based on the attraction and retention of a full-time pastor, for a designated period of time, to enable and guide the congregation's implementation of its plan for revitalization.

#### Administration

The congregation's Revitalization Plan shall be approved by the Presbytery's Ministry of Congregational and Pastoral Care (MCPC). The fund shall be administered, and grants awarded by, the MCPC.

#### Definitions

**Small Member Congregation:** While the definition of what constitutes a small congregation may vary, in the Presbytery of Florida it is generally considered to refer to congregations with an average weekly attendance at worship of fewer than 50 persons.

**Pastoral Leadership:** This term will ordinarily be understood to mean a Minister of Word and Sacrament who holds ordination in the Presbyterian Church (U.S.A.).

**Plan for Revitalization:** A congregation's Plan for Revitalization, also known as a *strategic plan*, shall reflect findings from a Holy Cow! Vital Signs Report and a MissionInsite Consultation, and must include, but not be limited to:

1. a statement of the congregation's vision and mission as it relates to congregational revitalization;
2. specific strategies for implementing that vision and mission;
3. identified goals and benchmarks for assessing the congregation's progress in implementing its plan;
4. a means of evaluating annually how the congregation and/or community have been transformed, including the congregation's next steps in its revitalization.

#### Qualifications

To qualify for a Pastoral Leadership Grant, a congregation will have completed, with the assistance of a Presbytery Consultant, both the Holy Cow! Congregational Assessment Tool and a MissionInsite community demographic assessment. Those tools are essential to the development of the congregation's strategic plan for revitalization.

A Viability Assessment Form must also be completed to determine the potential life and vitality of the congregation and the promise it holds for future ministry. The Ministry of Congregational and Pastoral Care will review this information.

After review of the Viability Assessment Form, the congregation will need to submit a Grant Application form which will aid MCPC in determining its decision.

### **Terms**

Ordinarily, a grant may be awarded annually for up to three years for a full-time designated pastor, depending upon the Fund's financial growth and the congregation's active participation in its Revitalization Plan. Failure to meet conditions of the congregation's strategic plan may constitute a default of the provisions of the grant and result in its early termination. Funds are to be disbursed to the congregation annually following the awarding of the grant, and each year thereafter following assessment of agreed upon benchmarks and achieved goals.

### **Evaluations**

- Evaluations shall be conducted by the MCPC every six months following the call of a pastor and the initiation of a congregation's Revitalization Plan. Each evaluation will be preceded by a written self-evaluation to be submitted by the session.
- The six-month evaluation will focus on the investment and energy of the members of the congregation. It will include written recommendations for modifications to the Plan that may be considered desirable, along with other feedback.
- The twelve-month evaluation will assess the progress of the congregation toward the achievement of the goals set forth in the Plan. Steps taken to date and all tangible results observed will be examined. The evaluation will include any written modifications to the Plan deemed appropriate along with other recommendations and feedback from the MCPC.
- The eighteen-month evaluation will focus on progress observed toward the goals of the revised Plan and the results of the implementation of any recommendations contained in the six month evaluation. The MCPC will provide recommendations and additional feedback to the congregation.
- The twenty-four-month evaluation will examine the achievements of the congregation in the fulfillment of the goals of the Plan.
- The thirty-month and thirty-six-month evaluations will examine the achievements of the congregation in the fulfillment of the goals of the Plan. In addition, the congregation and the MCPC will jointly determine next steps for the pursuit of the congregation's continued life and ministry.

# CONSULTANT VIABILITY ASSESSMENT FORM

(A fillable version of this form is available on the Presbytery website.)

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Church Name

## CONFIDENTIAL

To help the Ministry of Congregational and Pastoral Care determine whether engaging full-time called and installed pastoral leadership will be appropriate for this congregation, please provide answers to the following questions. There is an assumption that, by this time, both the Holy Cow! Congregational Assessment Tool and MissionInsite data search have been completed. ***Please keep this information confidential until you present this report to the Ministry of Congregational and Pastoral Care for review.***

Please respond to the following:

1. How does the Holy Cow! Assessment data describe the level of vitality in the congregation?

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2. How does the MissionInsite data describe the level of vitality in the community?

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3. To what degree does the congregation espouse a willingness to bring about change? How has this been expressed?

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4. Please attach indications of the financial health of the congregation for the past 3 years (e.g., budget revenue, investment funds and their restrictions, pledging/giving history, other sources of income).

5. Does data show an ability to provide at least 50% of the effective salary, pension dues, and professional expenses for 3 years, based on Presbytery minimums? \_\_\_\_ Yes \_\_\_\_ No

6. How many members have committed to being agents of change? \_\_\_\_

7. As the consultant, do you recommend moving forward with the Grant Application process and the use of Presbytery funds for this congregation? Yes \_\_\_\_\_ No \_\_\_\_\_ Why or why not?

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\_\_\_\_\_  
Name of Consultant Completing Form

\_\_\_\_\_  
Date

# PASTORAL LEADERSHIP GRANT APPLICATION

*(A fillable version of this form is available on the Presbytery website.)*

Congregation Name: \_\_\_\_\_ PIN: \_\_\_\_\_

Address: \_\_\_\_\_

Session Clerk: \_\_\_\_\_ Session Moderator: \_\_\_\_\_

Contact Person for Grant: \_\_\_\_\_

Address: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Home/Work Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Congregation Membership: \_\_\_\_\_ Average Worship Attendance: \_\_\_\_\_

.....

In what ways is your congregation demonstrating its commitment to the process of congregational revitalization?

In what ways has “Holy Cow!” impacted your thinking on congregational revitalization?

In what ways has “MissionInsite” impacted your thinking on congregational revitalization?

Where do members of your congregation see God at work in your community?

As you seek God’s call, based on what you learned through participation in “Holy Cow!” and “MissionInsite,” what three things do you intend to pursue in the process of revitalizing your congregation?

Provide plans, goals, and timelines for each of them.

The session of \_\_\_\_\_ met on \_\_\_\_\_ and voted affirmatively  
(church) (date)  
on this matter, fully understanding the expectations of this request.

Signed:

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

## PRESBYTERY OF FLORIDA

### MINI-GRANT APPLICATION FOR WORSHIP ENRICHMENT

*(A fillable version of this form is available on the Presbytery website.)*

Church Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Session Clerk: \_\_\_\_\_ Session Moderator: \_\_\_\_\_  
Primary Contact Person for Grant: \_\_\_\_\_  
Home/Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Congregation Membership: \_\_\_\_\_ Average Weekly Worship Attendance: \_\_\_\_\_

.....

1. How do you plan to use the mini-grant funds (please be specific) and how much additional funding is required beyond the matching funds this mini-grant requires? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. What are your expectations and anticipated changes for worship associated with this mini-grant?  
\_\_\_\_\_  
\_\_\_\_\_
3. What steps do you anticipate taking to bring about a change in worship that will further enrich the congregation's experience of worship? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The session met on \_\_\_\_\_ and voted affirmatively on this matter, fully understanding  
(date)  
the expectations of this request.

We will submit event photos and a report to MCPC within 3 months of receiving the mini-grant. \_\_\_\_\_  
(Clerk's initials)

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

\_\_\_\_\_  
Session Moderator

\_\_\_\_\_  
Date

# CALLED AND INSTALLED PASTOR 2026 ANNUAL COMPENSATION WORKSHEET

PRESBYTERY OF FLORIDA

(A fillable version of this form is available on the Presbytery website.)

*Note: This worksheet is provided to Ministers of Word and Sacrament and Clerks of Session as a guide for calculating the annual terms of call. It is not intended to provide Social Security or income tax advice. For income tax information, please refer to Internal Revenue Service publications or seek the advice of a competent tax advisor.*

## Personal Compensation

### \$ \_\_\_\_\_ **Line 1: Annual Cash Salary**

This is the actual cash amount of compensation paid to the Minister annually. It does not include any reimbursement for expenses or compensation for housing. This is part of the Board of Pensions total effective salary and part of the Minister's compensation package. **Lines 1 and 2, when added together, must meet or exceed the Presbytery minimum effective salary. The Presbytery minimum effective salary for 2026 is \$43,562.59.**

### \$ \_\_\_\_\_ **Line 2: Housing Allowance**

Enter here the amount paid to the Minister of Word and Sacrament to provide for housing in one of the following two (2) ways:

**a. Personally-owned or rental housing** – This amount shall not exceed the lesser of the:

- i. actual cost to maintain a home (including mortgage payments, utilities, and furnishings and appurtenances)

OR

- ii. fair rental value of the home, plus utilities, furnishings, and appurtenances.  
IRS regulations should be consulted but, generally speaking, any household expense is considered furnishings and appurtenances with the exceptions of food and maid service. The Housing Allowance is used with the Annual Cash Salary to calculate the Total Effective Salary for determining dues for the Board of Pensions.

OR

- b. Use of Manse** – The value of such housing shall be based on 30% of the cash salary, utilities, furnishings, and appurtenances (to the extent *provided by the church*) and any other amounts listed in lines 3, 4, and 5. This dollar amount is used in calculating the Total Effective Salary and part of the Minister of Word and Sacrament's compensation package per IRS regulations.

Further, when a manse is provided, an allowance shall be provided for utilities, furnishings, and appurtenances (to the extent these are paid for *by the Minister*). IRS regulations should be consulted but, generally speaking, any household expense is considered furnishings and appurtenances, with the exceptions of food and maid service. This allowance is included in determining the Total Effective Salary reported to the Board of Pensions for the calculation of dues.

### \$ \_\_\_\_\_ **Line 3: Other**

Enter here any additional compensation (such as dental, unless all employees receive dental) that is considered part of effective salary. (see [Understanding Effective Salary](#) published by the Board of Pensions.) This amount is included as part of the Total Effective Salary.

\$ \_\_\_\_\_ **Line 4: Additional SECA**

Enter here any amount *over* 50% of Minister's SECA liability, if offered. Under the terms of the Self-Employment Contributions Act (SECA), Ministers are considered self-employed for social security tax purposes (they are considered employees for income tax purposes). A Minister's SECA liability is estimated by adding lines 1 and 2 and multiplying by 15.3% (Ministers should consult their CPA or attorney for more precise calculations). Presbytery of Florida compensation standards require that churches reimburse Ministers for the portion of their SECA tax liability that would have been paid by the employer (the church) if the Minister were a regular employee. For calculation of this amount, see the instructions for Line 7 below. Reimbursement of 50% of SECA liability is *not* part of the Total Effective Salary for calculating Board of Pensions dues. However, if the church wishes to provide more than 50% of the Minister of Word and Sacrament's SECA liability, the amount over 50% is included in the Total Effective Salary when determining Board of Pensions dues.

\$ \_\_\_\_\_ **Line 5: Deferred Income**

This includes such items as equity funds, annuities, retirement savings accounts, etc. List here any such annual contributions made by the church on behalf of the Minister. This is included as part of the Total Effective Salary used to calculate dues for the Board of Pensions.

\$ \_\_\_\_\_ **Line 6: Total Effective Salary**

Enter here the sum of lines 1-5. This figure is the Total Effective Salary on which you will calculate the cost of participation in the Board of Pensions medical and pension program.

|                          |
|--------------------------|
| <b>Required Benefits</b> |
|--------------------------|

\$ \_\_\_\_\_ **Line 7: Major Medical**

Effective January 2025, the Board of Pensions has restructured the way Major Medical dues are calculated. Mandatory Pastor Participation for installed pastors is 16% of line 6. Other options are listed as well. The cost of additional coverage for spouse, children, or family may be split between the pastor and congregation, as negotiated. *In Plan Years 2025 through 2027, an Eligible Employer may continue to enroll a Minister Member in Transitional Pastor's Participation, provided that such Minister Member was enrolled by that Eligible Employer in Pastor's Participation in Plan Year 2024.*

Enter on Line 8 the amount for the selection chosen (a, b, c, d, or e). This figure represents the cost of participation in the medical program for the Minister of Word and Sacrament. This figure is paid to the Board of Pensions annually.

- a. Pastor Only (16% of Line 6)
- b. Pastor Plus Children (16% of Line 6 + \$8,950)
- c. Pastor Plus Spouse (16% of Line 6 + \$11,000)
- d. Full Family (16% of Line 6 + \$20,600)
- e. Medical (33% of Line 6) (*Pastor's Transitional Plan only through 2027*)

\$ \_\_\_\_\_ **Line 8: Pension (includes Death and Disability, and Temporary Disability)**

Enter the result of line 6 multiplied by 10%. This figure represents the cost of participation in the pension and disability programs for the Minister of Word and Sacrament. This figure is paid to the Board of Pensions.

\$ \_\_\_\_\_ **Line 9: Required SECA**

As indicated above (line 4), our Presbytery compensation standards require that churches reimburse Ministers of Word and Sacrament for 50% of their total SECA liability. Enter on this line the amount of line 6 multiplied by 7.65%.

\$ \_\_\_\_\_ **Line 10: Total Required Benefits** – total of lines 7, 8, and 9.

### ***Professional Reimbursements***

The IRS requires a plan of accountability for providing professional reimbursements (e.g., the submitting of receipts, tracking actual miles traveled for business). Such reimbursement accountability plans shall include the following, *at minimum*:

**\$ \_\_\_\_\_ Line 11: Automobile Expenses.**

Can be handled in either of the following ways:

- 1) reimbursement to the Minister for miles traveled in the exercise of professional responsibilities at the prevailing IRS rate-per-mile or,
- 2) direct reimbursement of actual expenses.

Either method requires vouchers for expenses to be approved for reimbursement and a record of business and total miles driven.

**\$ \_\_\_\_\_ Line 12: Continuing Education Allowance (\$750 *annual minimum*)**

Enter the amount provided to reimburse the Minister for continuing education (seminars, classes, etc.). This allowance may be accrued for up to 3 years for a total of \$2,250.

**\$ \_\_\_\_\_ Line 13: Books and subscriptions for business and professional purposes.**

**\$ \_\_\_\_\_ Line 14: Other expenses deemed necessary to the work of the pastor.**

**\$ \_\_\_\_\_ Line 15: Total Reimbursable Professional Expenses – total of lines 11-14**

#### ***Total Cost***

**\$ \_\_\_\_\_ Line 16: Total Cost to the Church – Enter the total of lines 6, 10, and 15.**

**Additional Provisions: Vacation and Study Leave** – Enter the ***number of weeks*** provided for vacation, study leave, and family medical leave at full compensation. Presbytery of Florida standards require a ***minimum*** of four (4) weeks of vacation and two (2) weeks of study leave each year. These standards also require a ***minimum*** of twelve (12) weeks of paid Family Medical Leave per the Book of Order (G-2.0804).

A helpful resource, *UNDERSTANDING EFFECTIVE SALARY*, can be found at: <https://www.pensions.org>.

## **Housing Allowance Resolution**

*(A fillable version of this form is available on the Presbytery website.)*

In order for a pastor's housing allowance to be recognized as tax exempt for the Internal Revenue Service, the session of each congregation must adopt a resolution stating the amount of the Effective Salary, and specifically the amount designated for Housing Allowance. This resolution needs to be adopted prior to the start of the payment of that amount, and spread in the minutes of the session.

If only the Cash Salary changes in a given year, the resolution does not need to be redone, and the resolution will apply to all subsequent years. It only needs to be redone whenever the Housing Allowance changes.

### **Housing Allowance Resolution Sample**

The following resolution was duly adopted by the session of [Name of Church] at a regularly scheduled meeting held on [Day, Month, Year], a quorum being present:

Whereas, ministers who own or rent their home do not pay federal income taxes on the amount of their compensation that their employing church designates in advance as a housing allowance, to the extent that the allowance represents compensation for ministerial services, is used to pay housing expenses, and does not exceed the fair rental value of the home (furnished, plus utilities); and

Whereas, Pastor [First and Last Name] is compensated by [Name of Church] exclusively for services as a minister of the gospel; and

Whereas, [Name of Church] does not provide Pastor [First and Last Name] with a parsonage; therefore, it is hereby

Resolved, that the total compensation paid to Pastor [First and Last Name] for calendar year 20\_\_ shall be [\$\_\_\_\_], of which [\$\_\_\_\_] is hereby designated to be a housing allowance; and it is further

Resolved, that the designation of [\$\_\_\_\_] as a housing allowance shall apply to calendar year 20\_\_ and all future years unless otherwise provided.

**PRESBYTERIAN CHURCH (U.S.A.)**  
**2026 ANNUAL PASTOR TERMS OF CALL**  
*(A fillable version of this form is available on the Presbytery website.)*

The \_\_\_\_\_ Presbyterian Church of \_\_\_\_\_, Florida,  
(City)  
(Church PIN \_\_\_\_\_), being well satisfied with your ministry among us, earnestly and solemnly desires  
you,

\_\_\_\_\_  
(Name)

to continue your pastoral services in the office of \_\_\_\_\_ for this congregation, promising  
you, in the discharge of your duty, all proper support, encouragement, and allegiance in the Lord. That you may  
be free to devote yourself to full-time ministry of the Word and Sacrament among us, we promise and obligate  
ourselves to pay the following:

**A. Personal Compensation**

**Amount**

- |                                                                                        |          |
|----------------------------------------------------------------------------------------|----------|
| 1. Annual Cash Salary *                                                                | \$ _____ |
| 2. Housing *                                                                           |          |
| a. Personally-owned or rental housing                                                  | \$ _____ |
| OR                                                                                     |          |
| b. Use of Manse (see worksheet) and utilities, furnishings,<br>appurtenances allowance | \$ _____ |
| 3. Other _____                                                                         | \$ _____ |
| 4. Additional SECA (above required 50%)                                                | \$ _____ |
| 5. Deferred Income (paid by church)                                                    | \$ _____ |
| 6. <b>Total Effective Salary</b> (add lines 1–5)                                       | \$ _____ |

**B. REQUIRED Benefits**

- |                                                                                                                                                                                                                                                                       |          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 7. Major Medical                                                                                                                                                                                                                                                      |          |
| <i>Pastor's Participation Plan</i>                                                                                                                                                                                                                                    |          |
| a. Pastor Only (16% of Line 6) or                                                                                                                                                                                                                                     | \$ _____ |
| b. Pastor Plus Children (16% of Line 6 + \$8,950)* or                                                                                                                                                                                                                 | \$ _____ |
| c. Pastor Plus Spouse (16% of Line 6 + \$11,000)* or                                                                                                                                                                                                                  | \$ _____ |
| d. Full Family (16% of Line 6 + \$20,600)                                                                                                                                                                                                                             | \$ _____ |
| * May be paid by Eligible Employer, employee, or shared                                                                                                                                                                                                               |          |
| <i>Transitional Pastor's Plan*</i>                                                                                                                                                                                                                                    |          |
| e. Medical (33% of Line 6)                                                                                                                                                                                                                                            | \$ _____ |
| * In Plan Years 2025 through 2027, an Eligible Employer may continue to enroll a Minister Member in<br>Transitional Pastor's Participation, provided that such Minister Member was enrolled by that Eligible<br>Employer in Pastor's Participation in Plan Year 2024. |          |
| 8. Pension 10% of Line 6 (including Death/Disability, and<br>Short-term Disability)                                                                                                                                                                                   | \$ _____ |
| 9. SECA (7.65% of line 6)                                                                                                                                                                                                                                             | \$ _____ |
| 10. <b>Total Required Benefits</b> (add lines 7–9)                                                                                                                                                                                                                    | \$ _____ |

**C. Professional Reimbursement**

|                                                                         |          |
|-------------------------------------------------------------------------|----------|
| 11. Automobile Expense                                                  | \$ _____ |
| 12. Continuing Ed (\$750 <b>annual minimum</b> , accruable for 3 years) | \$ _____ |
| 13. Books and subscriptions                                             | \$ _____ |
| 14. Other _____                                                         | \$ _____ |
| 15. <b>Total Professional Reimbursement</b> (add lines 11-14 )          | \$ _____ |

**Total Cost to the Church** (add lines 6, 10, and 15) \$ \_\_\_\_\_

**D. Additional Provisions: Vacation and Study Leave**

**Vacation** (4 weeks **minimum**) # \_\_\_\_\_ (weeks)

**Continuing Education** (2 weeks **minimum**) # \_\_\_\_\_ (weeks)

**Paid Family Medical Leave** (12 Weeks **minimum**) # \_\_\_\_\_ (weeks)

**APPROVED AND ACCEPTED:**

|                                                                     |               |
|---------------------------------------------------------------------|---------------|
| _____<br>Minister of Word and Sacrament                             | _____<br>Date |
| _____<br>Clerk of Session                                           | _____<br>Date |
| _____<br>Moderator, Ministry of<br>Congregational and Pastoral Care | _____<br>Date |

**Please return pages 5 and 6 of this form NO LATER THAN MARCH 31 to:**

Ministry of Congregational and Pastoral Care  
Presbytery of Florida  
PO Box 7  
Chipley, FL 32438  
Email: [office@presbyteryofflorida.com](mailto:office@presbyteryofflorida.com)

**\* The Presbytery minimum effective salary for 2026 is \$43,562.59. When added together, Line 1 (Annual Cash Salary) and Line 2 (Housing) must *meet or exceed* that amount.**

# PRESBYTERY OF FLORIDA

## Certified Christian Educators

(A fillable version of this form is available on the Presbytery website.)

Educator: \_\_\_\_\_ Church: \_\_\_\_\_

City: \_\_\_\_\_ Church PIN: \_\_\_\_\_

**Please complete appropriate fields, even if there have been no changes from the previous year.**

(Year)

### A. Personal Compensation

1. Master's Degree or 5+ years church experience \_\_\_\_\_
2. Certified Educator \_\_\_\_\_

### B. Required Benefits<sup>1</sup>

3. Major Medical (*Please see Board of Pensions for latest percentages*)
- a. Masters or 5+ years church experience \_\_\_\_\_
- b. Certified \_\_\_\_\_
4. Pension (*Please see Board of Pensions for latest percentages*)
- a. Masters or 5+ years \_\_\_\_\_
- b. Certified \_\_\_\_\_
5. Self-Employment (7.65%)
- a. Masters or 5+ years \_\_\_\_\_
- b. Certified Educator \_\_\_\_\_

### C. Reimbursed Expenses

6. Continuing Ed/Books \_\_\_\_\_
7. Other: \_\_\_\_\_
8. Total Reimbursed Expenses \_\_\_\_\_

**Total Amount** (add totals of A, B, and C) \_\_\_\_\_

**Additional Provisions:** 2-4 weeks of vacation;  
1-2 weeks paid study leave (may accumulate up to 3 years);  
12 weeks family medical leave with full compensation

<sup>1</sup>Social Security allowance up to 7.65% of salary is **not** considered a part of the salary when figuring Board of Pension dues.

\_\_\_\_\_  
Moderator/Clerk of Session

\_\_\_\_\_  
Educator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Please return this form by December 1 to:**

Moderator of the Ministry of Congregational and Pastoral Care  
Presbytery of Florida, PO Box 7, Chipley, FL 32438

## PRESBYTERY OF FLORIDA

### Stated Supply Pastor

*(A fillable version of this form is available on the Presbytery website.)*

The following agreement between the Presbytery of Florida, the Rev. \_\_\_\_\_, and the \_\_\_\_\_ Presbyterian Church session is for the purpose of providing pastoral services for \_\_\_\_\_ Presbyterian Church, \_\_\_\_\_, FL for a period of \_\_\_\_\_ (years/months), beginning \_\_\_\_\_.

#### EXPECTATIONS OF THE STATED SUPPLY:

1. Will provide regular preaching and worship leadership, and will administer the sacraments as agreed with the session. Worship will be at \_\_\_\_\_ a.m./p.m.
2. Will share pastoral care for the congregation, including hospital visitation and counseling with individuals and families, as needed.
3. Will visit new people attending the church who express interest in finding a new church home.
4. Will provide, with the session, administrative leadership for the work of the church. Will work with the session to develop goals and strategies for the time of service.
5. Will report semi-annually to the Ministry of Congregational and Pastoral Care (MCPC) regarding work with the church.

#### EXPECTATIONS OF THE SESSION:

1. Will provide support in every way possible to the stated supply pastor in the ministry of the respective church.
2. Will work with the stated supply pastor to establish goals for the present and future ministry of the church.
3. Will communicate openly and honestly with the stated supply pastor about the needs and concerns of the respective congregation and community.

#### EXPECTATIONS OF THE PRESBYTERY:

1. Will provide support and consultation to the stated supply pastor through MCPC.
2. Will assist the session and the stated supply pastor by providing a moderator for session and congregational meetings should the stated supply pastor not be available.

#### MUTUAL UNDERSTANDING:

During the length of the agreement, the Rev. \_\_\_\_\_ will be accountable to the Presbytery through MCPC and is responsible to the congregation through the session. The stated supply pastor will submit a thorough report twice per year to MCPC on the status of work, with the first such report due on \_\_\_\_\_.

It is further understood that in the event the stated supply pastor is of a denomination not in communion with the PCUSA, MCPC will provide the presence of a minister of Word and Sacrament on occasions when the Lord's Supper is to be celebrated or the sacrament of Baptism administered.

#### FINANCIAL PROVISIONS:

This agreement is for a period of up to three years and is renewable. However, the session may terminate the agreement upon thirty (30) days written notice to the stated supply pastor and MCPC. The stated supply pastor

may terminate this agreement with thirty (30) days written notice to the session and MCPC. The stated supply pastor is employed on a part-time basis for approximately \_\_\_\_\_ hours per week.

Annual compensation and benefits for these services are as follows:

Cash Salary:       \$\_\_\_\_\_

Housing:           \$\_\_\_\_\_

Travel:       Actual expenses to be reimbursed at the current IRS rate.

Other:       \_\_\_\_\_  
\_\_\_\_\_

Vacation:   Two weeks paid vacation will be granted after each 6 months of service.

**APPROVED AND ACCEPTED:**

\_\_\_\_\_  
Stated Supply Pastor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

\_\_\_\_\_  
Moderator, Ministry of Congregational  
and Pastoral Care (MCPC)

\_\_\_\_\_  
Date

**Please return this form by December 1 to:**

Moderator of the Ministry of Congregational and Pastoral Care  
Presbytery of Florida, PO Box 7, Chipley, FL 32438

## PRESBYTERY OF FLORIDA

### Stated Supply Pastor - Retired

*(A fillable version of this form is available on the Presbytery website.)*

The following agreement between the Presbytery of Florida, the Rev. \_\_\_\_\_, and the \_\_\_\_\_ Presbyterian Church session is for the purpose of providing pastoral services for \_\_\_\_\_ Presbyterian Church, \_\_\_\_\_, FL for a period of \_\_\_\_\_ (years/months), beginning \_\_\_\_\_.

#### EXPECTATIONS OF THE STATED SUPPLY:

1. Will provide regular preaching and worship leadership, and will administer the sacraments as agreed with the session. Worship will be at \_\_\_\_\_ a.m./p.m.
2. Will share pastoral care for the congregation, including hospital visitation and counseling with individuals and families, as needed.
3. Will visit new people attending the church who express interest in finding a new church home.
4. Will provide, with the session, administrative leadership for the work of the church. Will work with the session to develop goals and strategies for the time of service.
5. Will report semi-annually to the Ministry of Congregational and Pastoral Care (MCPC) regarding work with the church.

#### EXPECTATIONS OF THE SESSION:

1. Will provide support in every way possible to the stated supply pastor in the ministry of the respective church.
2. Will work with the stated supply pastor to establish goals for the present and future ministry of the church.
3. Will communicate openly and honestly with the stated supply pastor about the needs and concerns of the respective congregation and community.

#### EXPECTATIONS OF THE PRESBYTERY:

1. Will provide support and consultation to the stated supply pastor through the MCPC.
2. Will assist the session and the stated supply pastor by providing a moderator for session and congregational meetings should the stated supply pastor not be available.

#### MUTUAL UNDERSTANDING:

During the length of the agreement, the Rev. \_\_\_\_\_ will be accountable to the Presbytery through MCPC and is responsible to the congregation through the session. The stated supply pastor will submit a thorough report twice per year to MCPC on the status of work, with the first such report due on \_\_\_\_\_.

It is further understood that in the event the stated supply pastor is of a denomination not in communion with the PCUSA, MCPC will provide the presence of a minister of Word and Sacrament on occasions when the Lord's Supper is to be celebrated or the sacrament of Baptism administered.

#### FINANCIAL PROVISIONS:

This agreement is for a period of up to three years and is renewable. However, the session may terminate the agreement upon thirty (30) days written notice to the stated supply pastor and MCPC. The stated supply pastor

may terminate this agreement with thirty (30) days written notice to the session and MCPC. The stated supply pastor is employed on a part-time basis for approximately \_\_\_\_\_ hours per week.

Annual compensation and benefits for these services are as follows:

Cash Salary: \$\_\_\_\_\_

½ Social Security: \$\_\_\_\_\_

Travel: Actual expenses to be reimbursed at the current IRS rate.

Other: \_\_\_\_\_  
\_\_\_\_\_

Vacation: Two weeks paid vacation will be granted after each 6 months of service.

**APPROVED AND ACCEPTED:**

\_\_\_\_\_  
Stated Supply Pastor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

\_\_\_\_\_  
Moderator, Ministry of Congregational  
and Pastoral Care (MCPC)

\_\_\_\_\_  
Date

**Please return this form by December 1 to:**

Moderator of the Ministry of Congregational and Pastoral Care  
Presbytery of Florida, PO Box 7, Chipley, FL 32438

## PRESBYTERY OF FLORIDA

### 2026 COMMISSIONED RULING ELDER (CRE) CONTRACT

(A fillable version of this form is available on the Presbytery website.)

The following agreement is between the session of the \_\_\_\_\_ Presbyterian Church of \_\_\_\_\_, Florida and Elder \_\_\_\_\_ and is for the period from \_\_\_\_\_ to \_\_\_\_\_ for pastoral services as a commissioned ruling elder (CRE). During this time, you will be listed as the stated supply pastor for this church.

**EXPECTATIONS OF THE CRE:** (Please initial all that apply in accordance with the full- or part-time conditions of the contract.)

| Clerk | CRE   | MCPC  |                                                                        |
|-------|-------|-------|------------------------------------------------------------------------|
| _____ | _____ |       | Conduct worship each week.                                             |
| _____ | _____ | _____ | * Administer the Sacrament of the Lord's Supper.                       |
| _____ | _____ | _____ | * Administer the Sacrament of Baptism.                                 |
| _____ | _____ |       | Conduct funerals.                                                      |
| _____ | _____ | _____ | * Plan and moderate session and congregational meetings.               |
| _____ | _____ | _____ | * Perform a service of Christian marriage when invited by the session. |
| _____ | _____ |       | Visit members of the congregation, especially during crisis.           |
| _____ | _____ |       | Conduct officer training.                                              |
| _____ | _____ |       | Have voice and vote in Presbytery.                                     |
| _____ | _____ | _____ | Other _____                                                            |

#### EXPECTATIONS OF THE SESSION

1. Will provide support in every way possible to the CRE in the ministry of the church.
2. Will work with the CRE to establish goals for the present and future ministry of the church.
3. Will communicate openly and honestly with the CRE about needs and concerns of the congregation and community.

#### EXPECTATIONS OF THE PRESBYTERY

1. Will provide supervision for the CRE through Rev. \_\_\_\_\_ of the \_\_\_\_\_ Presbyterian Church, \_\_\_\_\_, Florida.
2. Will provide support and consultative services to the CRE through the Ministry of Congregational and Pastoral Care (MCPC).
3. Will assist the session and the CRE with emerging needs through the resources of the Presbytery.

## MUTUAL UNDERSTANDING

During the length of this agreement, Elder \_\_\_\_\_ will be accountable to the Presbytery through the MCPC and Rev. \_\_\_\_\_ and accountable to the congregation through the session. The CRE will submit a thorough report two times per year to the MCPC on the status of his/her/their work, with the first report being due on \_\_\_\_\_. At the end of this agreement, the session agrees to provide an evaluation for the MCPC.

## FINANCIAL AND TIME PROVISIONS

This agreement is for a period of up to 36 months and is renewable. However, the session may terminate this agreement upon 30 days written notice to the CRE and the MCPC of the Presbytery of Florida. The CRE may terminate this agreement upon 30 days written notice to the session and the MCPC. Compensation is based on the Presbytery's annual minimum salary for full-time pastors.

Example: **2026 Presbytery Minimum Effective Salary for Full-Time is \$43,562.59**

- |                                        |             |                            |
|----------------------------------------|-------------|----------------------------|
| 1. Salary for Half-time Position ..... | \$21,781.30 | (Presbytery Minimum x .50) |
| 2. Self-employment (7.65%) .....       | \$1,666.27  | (Salary x .0765)           |
| 3. Minimum Package .....               | \$23,447.57 | (Total of lines 1 and 2)   |

This contract is for a \_\_\_\_\_ (¼, ½, ¾, or full)-time commitment. The session obligates itself to provide the following remuneration:

|                                |          |
|--------------------------------|----------|
| Base salary                    | \$ _____ |
| Self-employment Amount (7.65%) | \$ _____ |
| Automobile Expense             | \$ _____ |
| Continuing Ed./Book Allowance  | \$ _____ |
| Other: _____                   | \$ _____ |
| Total for the Position         | \$ _____ |

**Vacation leave:** (One month annually; prorated if less than full-time for one year)

**Continuing Education:** (two weeks annually; prorated if less than full time for one year)

## APPROVED AND ACCEPTED:

\_\_\_\_\_  
Commissioned Ruling Elder (CRE)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Clerk of Session

\_\_\_\_\_  
Date

\_\_\_\_\_  
Moderator, Ministry of Congregational and Pastoral Care

\_\_\_\_\_  
Date

**Please return this form by December 1 to:**

Moderator of the Ministry of Congregational and Pastoral Care  
Presbytery of Florida, PO Box 7, Chipley, FL 32438

**PRESBYTERY OF FLORIDA**

**CONTRACT BETWEEN A MINISTER OF WORD AND  
SACRAMENT SERVING AS A PARISH ASSOCIATE  
AND A SESSION**

*(A fillable version of this form is available on the Presbytery website.)*

Having been nominated to the session by the installed pastor of the \_\_\_\_\_ Presbyterian Church of \_\_\_\_\_ to serve as parish associate, and being fully satisfied with your ministerial qualifications to lead and assist us in the fulfillment of our corporate and individual ministries, the session hereby contracts with you, \_\_\_\_\_, to serve as our parish associate from \_\_\_\_\_, 20\_\_ to \_\_\_\_\_, 20\_\_\_\_.

This contract is renewable at the end of this period of time and may be renewed and/or revised. The contract is subject to supervision by the Ministry of Congregational and Pastoral Care (MCPC). Should the installed pastor vacate the pulpit, the parish associate may continue in service until such time as another pastor is called and installed. It will be at the new pastor's discretion whether to invite the parish associate to continue in service.

You are to perform the following service(s), estimated to require \_\_ hours per week:

**SERVICE(S):**

---

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**COMPENSATION:**

The session promises and obligates itself to provide you with the following:

1. A salary of \$ \_\_\_\_\_ per month, payable monthly \_\_\_\_ (semi-monthly \_\_\_\_). (Optional)
2. Reimbursement for travel in the performance of your professional duties while serving our congregation at the prevailing IRS rate.
3. Other items: \_\_\_\_\_

---

This contract was agreed upon by the parish associate, the installed pastor, and the session on \_\_\_\_\_, 20\_\_.

**SIGNED:**

---

Parish Associate

---

Date

---

Installed Pastor

---

Date

---

Clerk of Session

---

Date

## PRESBYTERY OF FLORIDA

### A SAMPLE COVENANT FOR YOKED/SHARED MINISTRY

(A fillable version of this form is available on the Presbytery website.)

The \_\_\_\_\_ Presbyterian Church of \_\_\_\_\_, Florida, and

(City)

The \_\_\_\_\_ Presbyterian Church of \_\_\_\_\_, Florida, and

(City)

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 \_\_\_\_\_ for these 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 to the ministry of the Word among us, we promise and obligate ourselves to pay the following:

#### A. Personal Compensation

#### Amount

- |                                                                                     |          |
|-------------------------------------------------------------------------------------|----------|
| 1. Annual Cash Salary *                                                             | \$ _____ |
| 2. Housing *                                                                        |          |
| a. Personally-owned or rental housing                                               | \$ _____ |
| OR                                                                                  |          |
| b. Use of Manse (see worksheet) and utilities, furnishings, appurtenances allowance | \$ _____ |
| 3. Other _____                                                                      | \$ _____ |
| 4. Additional SECA (above required 50%)                                             | \$ _____ |
| 5. Deferred Income (paid by church)                                                 | \$ _____ |
| 6. <b>Total Effective Salary</b> (add lines 1–5)                                    | \$ _____ |

#### B. REQUIRED Benefits

- |                                                       |          |
|-------------------------------------------------------|----------|
| 7. Major Medical                                      |          |
| <i>Pastor's Participation Plan</i>                    |          |
| a. Pastor Only (16% of Line 6) or                     | \$ _____ |
| b. Pastor Plus Children (16% of Line 6 + \$8,950)* or | \$ _____ |
| c. Pastor Plus Spouse (16% of Line 6 + \$11,000)* or  | \$ _____ |
| d. Full Family (16% of Line 6 + \$20,600)             | \$ _____ |

\* May be paid by Eligible Employer, employee, or shared

*Transitional Pastor's Plan\**

- |                            |          |
|----------------------------|----------|
| e. Medical (33% of Line 6) | \$ _____ |
|----------------------------|----------|

\* In Plan Years 2025 through 2027, an Eligible Employer may continue to enroll a Minister Member in Transitional Pastor's Participation, provided that such Minister Member was enrolled by that Eligible Employer in Pastor's Participation in Plan Year 2024.

- |                                                                                  |          |
|----------------------------------------------------------------------------------|----------|
| 8. Pension 10% of Line 6 (including Death/Disability, and Short-term Disability) | \$ _____ |
|----------------------------------------------------------------------------------|----------|

9. SECA (7.65% of line 6) \$\_\_\_\_\_

10. **Total Required Benefits** (add lines 7–9) \$\_\_\_\_\_

**C. Professional Reimbursement**

11. Automobile Expense \$\_\_\_\_\_

12. Continuing Ed (\$750 *annual minimum*, accruable for 3 years) \$\_\_\_\_\_

13. Books and subscriptions \$\_\_\_\_\_

14. Other \_\_\_\_\_ \$\_\_\_\_\_

15. **Total Professional Reimbursement** (add lines 11-14 ) \$\_\_\_\_\_

**Total Cost to the Church** (add lines 6, 10, and 15) \$\_\_\_\_\_

**D. Additional Provisions: Vacation and Study Leave**

**Vacation** (4 weeks *minimum*) #\_\_\_\_\_ (weeks)

**Continuing Education** (2 weeks *minimum*) #\_\_\_\_\_ (weeks)

**Paid Family Medical Leave** (12 Weeks *minimum*) #\_\_\_\_\_ (weeks)

Contributions of Each Partner Church:

\_\_\_\_\_ Church \$\_\_\_\_\_ for the Year 20\_\_, \$\_\_\_\_\_ per month

\_\_\_\_\_ Church \$\_\_\_\_\_ for the Year 20\_\_, \$\_\_\_\_\_ per month

Be it further known, pastoral activities that will be expected (indicate activities for each congregation):

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

\_\_\_\_\_  
Pastor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Clerk of Session/Congregation

\_\_\_\_\_  
Date

\_\_\_\_\_  
Clerk of Session/Congregation

\_\_\_\_\_  
Date

\_\_\_\_\_  
Moderator of Meeting

\_\_\_\_\_  
Date

\_\_\_\_\_  
Moderator, Ministry of Congregational  
and Pastoral Care (MCPC)

\_\_\_\_\_  
Date

# SESSION RECORDS REVIEW

(A fillable version of this form is available on the Presbytery website.)

## Presbytery of Florida

### ANNUAL REVIEW OF SESSION MINUTES AND RECORDS

Church Name/City \_\_\_\_\_ Year Being Reviewed \_\_\_\_\_

Clerk of Session who prepared this sheet \_\_\_\_\_ Date: \_\_\_\_\_

Name of Reviewer \_\_\_\_\_ Date: \_\_\_\_\_

### INSTRUCTIONS

**The Clerk of Session** is to fill in the page numbers or other pertinent information of where the “Recorded Items” are to be found. This is to be done ahead of the review. If an item was not recorded, please indicate this in the Page Numbers column with a brief explanation.

**The Reviewer** is to check the page numbers indicated by the clerk of session to assure the items are correct. If there is a discrepancy, please make note. If an item was not accomplished or recorded, please make a notation of that in the “Reviewer’s Comments” column. Any discrepancy or omitted item is called an “exception” which will be recorded on the last sheet of this form. When the review is completed, please return to the person hosting the review session.

### ITEMS TO BE RECORDED AT EACH MEETING

| Recorded Item                                                                    | Reference            | Page Numbers | Reviewer’s Comments |
|----------------------------------------------------------------------------------|----------------------|--------------|---------------------|
| Date, time, place of each meeting, and stated or special meeting, quorum present | G-3.0203             |              |                     |
| Meeting at least quarterly.                                                      | G-3-0203             |              |                     |
| Full names of ruling elders present, excused or absent.                          | Robert's Rules       |              |                     |
| Full name of moderator                                                           | Robert's Rules       |              |                     |
| Opened and closed each meeting with prayer                                       | G-3.0105<br>W-3.6103 |              |                     |
| Minutes approved by session                                                      | Robert's Rules       |              |                     |

|                                                                                                            |                       |  |  |
|------------------------------------------------------------------------------------------------------------|-----------------------|--|--|
| Signature of Clerk of Session or moderator for each meeting                                                | Robert's Rules        |  |  |
| Financial report at each meeting or regularly                                                              | G-3.0205              |  |  |
| Session authorization of Sacrament of the Lord's Supper (at least quarterly) including home bound members. | G-3.0201b<br>W-2.4010 |  |  |
| Approval of the Sacrament of Baptism and report of its administration                                      | G-3.0201b<br>W-2-3011 |  |  |
| Commissioner(s) to Presbytery meetings elected by session                                                  | G-3.0202              |  |  |
| Report of Commissioner(s) given at next session meeting following each Presbytery meeting.                 | G-3.0202              |  |  |

### **ITEMS TO BE RECORDED ANNUALLY**

| <b>Recorded Item</b>                                                                                   | <b>Reference</b>  | <b>Page Numbers</b> | <b>Reviewer's Comments</b> |
|--------------------------------------------------------------------------------------------------------|-------------------|---------------------|----------------------------|
| Training, examination of newly elected ruling elders and deacons.                                      | G-3.0201c         |                     |                            |
| Ordination and Installation of ruling elders and deacons                                               | G-3.0201c         |                     |                            |
| Election of Church Treasurer(s) by session                                                             | G-3.0205          |                     |                            |
| Election of Clerk of Session by session                                                                | G-3.0104          |                     |                            |
| Report of annual review of compensation for pastor and non-clergy staff                                | G-2.0804 G-3.0106 |                     |                            |
| Review of congregation's sexual misconduct prevention policy                                           | G-3.0106          |                     |                            |
| Review of congregation's child/youth protection policy                                                 | G-3.0106          |                     |                            |
| Session approval of budget.                                                                            | G-3.0205          |                     |                            |
| Financial review or audit                                                                              | G-3.0113          |                     |                            |
| Insurance Review - adequate property and liability coverage, including officers. Policy summary sheet. | G-3.0112          |                     |                            |

|                                                                                   |                       |  |  |
|-----------------------------------------------------------------------------------|-----------------------|--|--|
| Session review of annual statistical report.                                      | G-3.0202f             |  |  |
| Annual statistical report included with minutes.                                  | Presbytery of Florida |  |  |
| Session composition with regard to racial ethnic members, women, men, age groups, | G-3.0103              |  |  |

## MINUTES OF CONGREGATIONAL MEETINGS

| Recorded Item                                                                            | Reference                  | Page Numbers | Reviewer's Comments |
|------------------------------------------------------------------------------------------|----------------------------|--------------|---------------------|
| Congregation met at least annually                                                       | G-1.0501                   |              |                     |
| Presentation of session approved budget in minutes                                       | G-3.0205                   |              |                     |
| Election of Nominating Committee by congregation                                         | G-2.0401                   |              |                     |
| Election of elders, deacons, trustees (where applicable)                                 | G-1.0503                   |              |                     |
| Minutes of all congregational meetings are approved and signed by clerk.                 | G-1.0505<br>Robert's Rules |              |                     |
| Approval of Terms of Call of pastor(s) by the congregation and inclusion in the minutes. | G-1.0503                   |              |                     |

## CHURCH ROLLS AND REGISTERS

| Recorded Item                                            | Reference | Yes/No | Reviewer's Comments |
|----------------------------------------------------------|-----------|--------|---------------------|
| Roll of Active Members maintained by session             | G-3.0204a |        |                     |
| Roll of Baptized Members maintained by session           | G-3.0204a |        |                     |
| Roll of Affiliate Members, if any, maintained by session | G-3.0204a |        |                     |
| List of Ruling Elders and Deacons, with ordination date  | G-3.0204b |        |                     |
| List of Pastors, Associates, with dates of service       | G-3.0204b |        |                     |
| Record baptisms with date of birth and name of parents.  | G-3.0204b |        |                     |
| Record of Marriages (optional)                           | G-30204b  |        |                     |

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**Narrative Questions - use additional pages as needed:**

1. As a Clerk of Session, what do you need from the Presbytery of Florida to do your job better or more easily?
2. Are there mission stories from your congregation that you would like to share?

**TO BE COMPLETED BY THE REVIEWER**

The minutes of \_\_\_\_\_ Church were reviewed and approved as:

\_\_\_\_\_ *without exception (no errors found)*

\_\_\_\_\_ *with exception (some errors found)*

Reviewer's Signature: \_\_\_\_\_

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

## Presbytery of Florida

### NON-PARISH VALIDATED MINISTRY REQUEST

Ministers seeking continued service/status in a Non-Parish Validated Ministry in service to the broader Church in accordance with Book of Order G-2.0503a, need to have Ministry of Congregational and Pastoral Care approval of that ministry. Please provide the following information. Feel free to use a separate sheet to complete your answers.

Name: \_\_\_\_\_ Home Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

1. State either (a) the governing body or agency from which you have a call or (b) the work as defined in G-2.0503a for which you seek permission from this Presbytery. Please attach a copy of the call or contract under which you will work.

Give the street address, community, zip code and telephone number with area code of the calling agency or employer referred to above.

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2. Choose the description which best applies to the ministry you seek to validate:

- ☐ Primary emphasis is given to proclamation of the Word and celebration of the Sacraments.
- ☐ Primary emphasis is given to deeds of love and mercy.
- ☐ Primary emphasis is given to work that is educational.
- ☐ Primary emphasis is given to work that is administrative.
- ☐ Primary emphasis is given to work that is legislative.
- ☐ Primary emphasis is given to work that is judicial.
- ☐ Primary emphasis is given to work that is prophetic.
- ☐ Primary emphasis is given to work that is other than any of the above.

Explain briefly why the ministry you propose to have validated falls in the category you checked above.

3. State how the ministry you seek to have validated will be in demonstrable conformity with the mission of God's people in the world as set forth in Holy Scripture, The Book of Confessions and the Book of Order.
4. State how the ministry you seek to have validated will be one that serves others, aids others, and enables the ministries of others.
5. State why the ministry you seek to have validated requires an ordained minister.
6. Briefly describe the provisions for accountability within the calling/employing organization and your vision for remaining accountable to the Presbytery for the character and conduct of your ministry.
7. Please indicate which of these apply to you:  
  
I intend to affiliate and worship at \_\_\_\_\_  
  
I would like to serve as a Parish Associate \_\_\_\_\_  
  
I would like to be available for pulpit supply \_\_\_\_\_
8. Please describe your service to the Presbytery, Synod, General Assembly or larger church.

## Presbytery of Florida

### NON-PARISH VALIDATED MINISTRY ANNUAL REPORT

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

What is your Validated Ministry? \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

1. Which best applies to the ministry in which you engage?

- ☐ Primary emphasis is given to proclamation of the Word and celebration of the Sacraments.
- ☐ Primary emphasis is given to deeds of love and mercy.
- ☐ Primary emphasis is given to work that is educational.
- ☐ Primary emphasis is given to work that is administrative.
- ☐ Primary emphasis is given to work that is legislative.
- ☐ Primary emphasis is given to work that is judicial.
- ☐ Primary emphasis is given to work that is prophetic.
- ☐ Primary emphasis is given to work that is other than any of the above.

2. Explain briefly how your ministry falls into the category you checked above.

3. How has this ministry served others, aided others, and enabled the ministries of others.

4. State how your ordination vows have been fulfilled in your ministry.

5. Besides the Presbytery through the Committee on Ministry, to whom have you been accountable in your ministry?

6. Please indicate with which congregation you have affiliated this past year.

I am affiliated with and worship at \_\_\_\_\_

7. Please describe how you have been engaged in the life and work of the Presbytery, Synod, or General Assembly.

## PRESBYTERY OF FLORIDA

### TERMS OF CONTESTED DISSOLUTION AGREEMENT

This document is a dissolution agreement between the Rev. \_\_\_\_\_ and \_\_\_\_\_ Presbyterian Church. We, the members of the \_\_\_\_\_ Presbyterian Church, request that the Presbytery of Florida dissolve the pastoral relationship between this church and the Rev. \_\_\_\_\_ on the following terms:

Reasons for Requesting Dissolution: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1) Terms:

- a. Continuation of salary and benefits (exclusive of mileage and professional expense reimbursement) for \_\_\_\_\_ months\*;
- b. Continuation of Board of Pensions dues for \_\_\_\_\_ months;
- c. Use of the manse (if applicable), inclusive of previously-agreed utilities allowance;
- d. Use of the office and permission to be on church premises after the effective date of this dissolution for \_\_\_\_\_ days;

2) The date of the congregational meeting to approve this dissolution agreement will be \_\_\_\_\_.

3) The last date on which the Rev. \_\_\_\_\_ will be expected to perform ministerial duties will be \_\_\_\_\_.

4) The effective date of dissolution of pastoral relationship (last date on which Board of Pensions dues will be paid) is \_\_\_\_\_.

5) Other terms:

- a. It is understood that all benefits for the Rev. \_\_\_\_\_ will be discontinued at any time before \_\_\_\_\_, should he/she receive another call for full-time employment and will be continued at a prorated amount in the event he/she receives a part-time call.

\* Monthly Salary and benefits are understood as follows:

|                     |          |                        |          |
|---------------------|----------|------------------------|----------|
| Cash Salary         | \$ _____ | Board of Pensions Dues | \$ _____ |
| Housing Allowance   | _____    | 403(B) Savings Plan    | _____    |
| or Equity Allowance | _____    | Manse Utilities        | _____    |
| Soc. Sec./Medicare  | _____    | Other                  | _____    |

We, the undersigned, having negotiated this agreement in good faith, will be diligent in fulfilling it. We agree that both parties will refrain from disparaging the other in any way and that, if this commitment is violated by either party, the terms of dissolution may be altered.

Signed by the designated representative of the session of \_\_\_\_\_  
Presbyterian Church, the Rev. \_\_\_\_\_, and his/her designated advocate at \_\_\_\_\_  
Presbyterian Church on \_\_\_\_\_.

|                             |               |
|-----------------------------|---------------|
| _____<br>Pastor's Signature | _____<br>Date |
|-----------------------------|---------------|

|                                      |               |
|--------------------------------------|---------------|
| _____<br>Pastoral Advocate Signature | _____<br>Date |
|--------------------------------------|---------------|

|                                            |               |
|--------------------------------------------|---------------|
| _____<br>Designated Session Representative | _____<br>Date |
|--------------------------------------------|---------------|

|                                                                                |               |
|--------------------------------------------------------------------------------|---------------|
| _____<br>Ministry of Congregational and Pastoral Care (MCPC)<br>Representative | _____<br>Date |
|--------------------------------------------------------------------------------|---------------|

|                                              |               |
|----------------------------------------------|---------------|
| _____<br>Clerk of the Congregational Meeting | _____<br>Date |
|----------------------------------------------|---------------|

|                                                                                 |               |
|---------------------------------------------------------------------------------|---------------|
| _____<br>Approved by the Ministry of Congregational<br>and Pastoral Care (MCPC) | _____<br>Date |
|---------------------------------------------------------------------------------|---------------|

## **Recognition of Retirement from the Ministry of Word and Sacrament**

Lord, you have been our refuge from one generation to another.

**Before the mountains were brought forth, or the land and the earth were born, from age to age you are God.**

Bless the Lord, O my soul, and all that is within me, bless God's holy name.

**Bless the Lord, O my soul, and forget not all God's benefits,**

who forgives all your sins and heals all your infirmities; who redeems your life from the grave and crowns you with mercy and loving-kindness;

**who satisfies you with good things, and your youth is renewed like an eagle's.**

(Name), you are coming to the completion of your active service as a Minister of Word and Sacrament. Your sisters and brothers in this Presbytery rejoice with you in the evidence of the Holy Spirit in your work. We thank God for your dedicated ministry in the church of Jesus Christ, and we praise God for the grace that has allowed your ministry to touch many lives.

Now we come to mark with you the fulfillment of your calling, as the Presbytery of Florida confers upon you the status, Honorably Retired as of (effective date). While we know this begins a time of rest and the enjoyment of other callings, we value the experience you have gained and the skills you have acquired throughout your years of ministry. Therefore, we welcome your continued participation in the life of the church, using your gifts in meaningful ways. You remain a colleague in ministry, and we will continue to seek your wisdom and your fellowship.

Together with the whole church, you will find new opportunities to fulfill your baptismal calling, as one marked by the Holy Spirit, a disciple of Jesus Christ. May God continue to bring joy and peace to your life, just as you have blessed the Presbyterian Church with your ministry and the gospel of Jesus Christ.

Let us pray.

Eternal God, through all the years of our lives your love protects and guides us. By your Spirit you call us to varied ministries in the service of Jesus Christ. We praise you for your gifts to your servant (Name), for his/her faithful proclamation of your Word, his/her administration of the holy sacraments of Jesus Christ, and his/her pastoral care and leadership in the church. Grant to (Name) time for refreshment and rest, reflection and rejoicing, and the fullness of your peace.

Through your Holy Spirit bless each of us that we may remember the love of Jesus Christ which unites us in the service of our Lord. In the name of Christ we pray. Amen.

# Recognition of Certified Church Musicians

## ORDER OF WORSHIP

Sentences of Scripture

Prayer

Welcome and Charge

When persons have been certified as church musicians, the Presbytery may use this service to recognize their particular leadership. It may be used alone or in the context of the Presbytery's worship. When included in a complete service, this liturgy should follow the sermon and precede celebration of the Eucharist.

*The moderator and those whose particular ministry is to be recognized may gather at the baptismal font or pool.*

## SENTENCES OF SCRIPTURE

*The moderator leads the people:*

We, who are many, are one body in Christ,  
**and individually we are members one of another.**

Clothe yourselves with love, which binds everything together in perfect harmony. Let the peace of Christ rule in your hearts, to which you were called in the one body. And be thankful.

Let the word of Christ dwell in you richly; teach and admonish one another in all wisdom; and with gratitude in your hearts sing psalms, hymns, and spiritual songs to God. Lead a life worthy of the calling to which you have been called, making every effort to maintain the unity of the Spirit in the bond of peace.

There is one body and one Spirit, just as we were called to the one hope of our calling,  
**one Lord, one faith, one baptism, one God and Father of all, who is above all and through all and in all.**

*The moderator continues:*

The Presbytery of N. celebrates that N., having completed all preparations prescribed in the Constitution of the Presbyterian Church (U.S.A.), has been granted certification as a church musician. We now recognize N. as a certified church musician in our Presbytery.

## PRAYER

Almighty God, in every age you have chosen servants to speak your word and lead your loyal people. We thank you for N., whom you have called to serve you as a certified church musician. Give *her/him* gifts to do *her/his* particular work. Fill *her/him* with your Holy Spirit, so that *she/he* may have the same mind that was in Christ Jesus, and live as Christ's faithful disciple.

*All may pray together:*

**God of grace, in baptism you have called us to a common ministry as ambassadors of Christ, trusting us with the message of reconciliation. Give us courage and discipline to follow where your servants rightly lead us, that together we may declare your wonderful deeds and show your love to the world; through Jesus Christ the Lord of all. Amen.**

## **WELCOME AND CHARGE**

*The moderator greets the church musician:*

On behalf of the Presbytery of N., I welcome you to this ministry. Whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God through him. **Amen.**

*When a congregation desires to recognize this certification, the liturgy for Commissioning to Ministry within a Congregation (BCW 518) may be adapted.*

## Necrology Liturgy

(Sample)

*The Stated Clerk will prepare the list in advance and ask the assistance of additional commissioners to read the names of those who have died.*

**Introduction:** Since this time last year, \_\_\_\_\_ (number) of leaders in our Presbytery have passed on to their reward. Their names shall be read, we will offer a prayer to our God, remember, and join in singing a hymn.

**Prayer:** Let us pray. Eternal God, as we remember your servants, who having lived this life in faith and service to the church of our Lord, Jesus Christ, we lift our hearts to you. Grant us a time of reflection on the work and ministry provided by these persons, the faith they shared, and the witness given to our Lord and Savior, Jesus Christ. Amen.

### Reading of the Names

**Prayer:** Let us pray. Eternal God, we bless you for the great company of all those who have kept the faith, finished their race, and who now rest from their labor. We praise you for those dear to us whom we have just named. We thank you that they have been received into your presence.

Lord of life and death, you made us in your image and hold us in your care. We thank you for your servants, for the gift of their lives, and for the love and mercy they received from you and shared with us.

Especially, we praise you for your love in Jesus Christ, who died and rose from the grave to free us from death and give us life eternal. Grant that, when our time on earth is ended, we may be united with all the saints in the joy of your eternal home. Through Jesus Christ our Lord. Amen.

**Hymn:** An appropriate hymn may be sung.

## PREPARING FOR THE HOLY COW! ASSESSMENT

### LOCAL ARRANGEMENTS TEAM

Briefly, this is what will happen:

- Identify who is going to do the assessment
- Identify when the assessment will take place.
- Determine how the assessment will take place.
- Promote the assessment with the congregation
- The congregation does the assessment
- The consultant delivers the results to the session and congregation

For Revitalization

- The session appoints a revitalization team
- The revitalization team ascertains short and long-term goals with benchmarks.
- Goals are presented to the session

For New Pastor Search

- The congregation appoints a Pastor Nominating Committee
- The consultant works with the PNC to write a Ministry Discernment Profile.
- The session approves the final MDP
- The search begins.

### THE DETAILS

**IDENTIFY WHO** is going to take the assessment.

The list of participants is called the Assessment Roll.

The words to keep in mind when developing this list are ***“invested and able.”***

A person demonstrates their investment in the future of the church through some combination of worship attendance, participation/leadership in ministry/education, and/or financial support.

An able person is someone with the maturity and experience in the church to understand the importance of the assessment and who can accurately interpret the questions. They must also possess the ability to complete the assessment in one sitting.

The Assessment Roll is typically a list of adult members and active non-members with the following categories removed:

- Those who live permanently out of town
- Those who have neither contributed nor attended in the last 12 months
- Those who are physically or emotionally unable to cope with the assessment
- Those under 16 years of age

**IDENTIFY WHEN** you will run the assessment, typically a 3-4 week window.

**IDENTIFY HOW** you are going to deliver the assessment. You will likely be using a combination of a unique web link distributed by email and paper copies.

Compile a list of members on the Assessment Roll that have current email addresses (it is unlikely that you will have one for everyone). Develop an email blast template with these addresses.

For those without email:

- You will need to make paper copies from the pdf provided for the few who cannot take the survey on-line.
- Decide how you are going to distribute these surveys.
- Consider making them available only in the church office.
- In addition, it will increase your return rate if you provide a self-addressed stamped envelope with the church's address also in the return section.
- DO NOT provide for general distribution of the paper copies. It is important that folks do not discuss questions before taking the survey.
- You may want to make arrangements for church computers to be available to those who do not have access to computers at home. If your church has wireless internet capabilities, some folks will be willing to share their laptops to set up "computer labs" at designated times.

## ANNOUNCE AND INTRODUCE THE CONGREGATIONAL ASSESSMENT TOOL (CAT)

It is important to prepare your congregation to take the CAT. To this end, you will want to announce the session's decision to administer the CAT to the congregation and when it will be available.

Research shows that folks are more likely to comply with a request if they understand *why* they are being asked to do so. To this end, we strongly recommend that you introduce the CAT by sending an initial letter by snail mail to everyone on your Assessment Roll. The letter should reach each person by name, whether living in the same household or not. If your church regularly communicates with your congregation via email, this will work well, too. Please make sure that your non-computer users get a snail-mail letter.

The introduction should:

- Tell them that they have been selected to participate in the assessment
- Explain the specific purpose(s) of the assessment
- Emphasize the importance of their individual participation
- Detail the process of delivery (that an email link or web-page access will be provided and the availability of paper surveys).

### Preparation Letter

*This letter should be sent approximately 1 week prior to launching the survey.*

*At the same time*, start verbally publicizing the upcoming assessment in worship, committee meetings, education classes, choir rehearsal, church bulletins, and any other time and place you can think of. These announcements should include the same information as above.

### *Sample Letter*

#### **WE WANT TO KNOW YOUR STORY!**

As you know, we recently agreed to move forward with Holy Cow! Consulting to help us plan our future. You have been selected to participate in the first step which is to conduct a congregational assessment. This assessment will provide a clear picture of who we are as a church and what directions are most important for our future. The tool we'll use is the Congregation Assessment Tool (CAT), which will provide key indicators of our congregational health along with areas of challenge and potential growth. It will help us to collect and understand the range of views that exist at insert your church name and the possibilities, willingness, capacity and energy for moving our ministry into the future.

If you have provided us with a current email address, within the next few days, you will receive a unique web link to complete the assessment online. If you would prefer to take the assessment using a paper copy, please stop by the office, and we will provide one for you along with a self-addressed stamped envelope.

NOTE: If there is only one email address for all members of your household, it may be tempting to have one person take the survey on behalf of the family. However, *please be sure your spouse and*

*all young adults living in your home have an opportunity to complete the survey.* **INDIVIDUAL INPUT** is key to our gaining insight into overall perceptions and experiences.

Please set aside enough time to answer all the questions. This will take about \_\_\_\_\_ minutes. All survey responses are strictly anonymous.

Thank you for your willingness to be a part of this congregational assessment and for helping to build your church name future.

If you have questions, please contact insert name(s) at insert email and phone contact information

### *Sample Bulletin Article*

#### **PLANNING OUR FUTURE TOGETHER!**

We are inviting you to complete the Church Assessment Tool (CAT), an on-line instrument that will help leaders gauge the strength, vitality, and trends in our church. The information gained from this assessment will be valuable in helping the leaders of insert name of church as they make decisions about the future of insert name of church.

In a few days, you will receive an email with a unique link to the CAT. Beginning insert date, we are asking you to go online by clicking on the link provided and tell us about your experiences in and priorities for our church. Please do not discuss the survey or your answers with others as this may influence their answers.

If you need a paper copy, please come to the office, and we will provide one for you along with a self-addressed stamped return envelope.

All answers are strictly anonymous. We have no way of matching any assessment to a particular person, so please feel free to candidly share your perceptions, opinions and experiences. Our future together is dependent on your participation and honest answers.

If you have questions, please contact insert name and contact information of team member who is available to answer questions

Many thanks,

Enter names of leadership team charged with the administration of the CAT.

## SENDING THE LINK

Launching your CAT is easy, and it is exciting to finally get it “out there.”

Email Launch:

The Local Arrangements Team will receive a unique web link that has been created using a service called Survey Monkey. When you click on this link, it takes you directly to your assessment. This link can be copied from your account and pasted directly into your email notification.

On the day you have designated to start, send an email blast to everyone on your Assessment Roll with the Survey Monkey link in the body of the email.

*Sample for First Email Announcement with the Link*

### PLANNING OUR FUTURE TOGETHER!

Our church has entered into a time of discernment during which we are gathering information to guide our decisions for our future. Recently, you have heard and read about one aspect of this process: *The Church Assessment Tool* (CAT). This tool will provide a clearer picture of who we are as a church and what directions might be important for our future. **Your response is very important to us.**

This email indicates that you have been selected to participate in the CAT. It is not transferable; please do not forward it. We ask that you take the on-line assessment as soon as possible, but before enter date.

All answers are strictly anonymous. We have no way of matching any assessment to a particular person, so please feel free to candidly share your perceptions, opinions and experiences. The assessment will take approximately enter # minutes to complete. Please set aside enough time to complete the survey all at one time. Our future together is dependent on your participation and honest answers.

When you are ready, click on this link and begin. Copy and paste the Survey Monkey link here.

If you have questions, please contact insert name and contact information of team member who is available to answer questions

Many thanks,

Enter names of leadership team charged with the administration of the CAT.

### Handling Paper Copies:

You will have already decided how to distribute the paper copies of the assessment and the return envelopes. At first, make only a few copies (unless you know you will have a need for many).

Once again, we encourage you to make it as easy as possible for people to take the assessment on-line. It is our experience that paper copies frequently contain skipped questions or entire pages. In addition,

without the requirements that are enforced in the on-line version, many folks will misinterpret or not read instructions which often results in answers that cannot be used.

### **Guidelines and Instructions For Using Paper Surveys**

Paper surveys are frequently returned incomplete and/or filled out incorrectly. When this happens, the data that can be used from that survey is limited. Therefore, we suggest the following guidelines:

1. Before distributing a paper survey, it is helpful to make sure that all on-line options for taking the survey have been exhausted. For example: have you made use of “computer stations” at the church? This can be done by borrowing laptops from willing members and inviting folks to take the survey at an allotted time. Many folks who are mildly computer phobic can easily manage the survey with a little help.
2. When a paper survey must be used, a little coaching goes a long way. There are several ways to go about this.
  - Encourage folks to read the instructions!
  - Emphasize that incomplete surveys result in data that cannot be used.
  - Set up a coffee and cookies before/after worship and invite those that want to take the assessment this way to take it together. A person from the leadership team should be available to answer questions, guide respondents through questions with more complex formatting such as ranking questions, and, with the respondent’s permission, look over the survey to make sure it is complete.
  - Train the office staff in coaching those that come to pick up the survey. For example, show that only one answer can be filled in per question and that ranking questions must be filled out so that each ranking option is used only once.
  - If you anticipate that many folks will need to use this format, it may be helpful to utilize a simple PowerPoint presentation at an appropriate time during regularly scheduled services to demonstrate the correct and incorrect way to fill out the survey.
3. Data from paper surveys should be entered by a trusted person using the Survey Monkey link. The first set of consecutive questions from incomplete surveys can be entered, but data from the first skipped question and beyond cannot be used, as the system will not allow you to proceed without answering each question, as is the case on the on-line version.

# **HOLY COW! CHURCH ASSESSMENT TOOL**

## **CHURCH DATA FORM**

*(A fillable version of this form is available on the Presbytery website.)*

1. What would you estimate has been the population trend during the past 3 years within one mile of your church?

\_\_\_\_\_ Rapid Decline  
\_\_\_\_\_ Slow Decline  
\_\_\_\_\_ Static  
\_\_\_\_\_ Slow Growth  
\_\_\_\_\_ Rapid Growth  
\_\_\_\_\_ Commercial Area

2. What would you estimate has been the trend in income level during the past 3 years within one mile of your church?

\_\_\_\_\_ Increased more rapidly than our larger community  
\_\_\_\_\_ Increased the same as our larger community  
\_\_\_\_\_ Increased but somewhat less than our larger community  
\_\_\_\_\_ Some increase, but considerable less than our larger community  
\_\_\_\_\_ Has remained about the same  
\_\_\_\_\_ Has decreased  
\_\_\_\_\_ Commercial area

3. Please enter the numerical size of your church based on the most recent time to count membership.

4. Please enter the numerical size of your church 1 year earlier (using the same criteria above).

5. Please enter the numerical size of your church 2 years earlier (using the same criteria in Q3).

6. Please enter the numerical size of your church 3 years earlier (using the same criteria in Q3).

7. Please enter the number of new members received by your church in the past 12 months.

8. Please enter the number of new members received by your church 1 year earlier.

9. Please enter the number of new members received by your church 2 years earlier.

10. Please enter the number of new members received by your church 3 years earlier.

11. Please enter the number of your average weekly worship attendance over the past 12 months.
12. Please enter the number of your average weekly worship attendance 1 year earlier.
13. Please enter the number of your average weekly worship attendance 2 years earlier.
14. Please enter the number of your average weekly worship attendance 3 years earlier.
15. How many persons were on the Church Assessment Roll you created before launching the assessment (the number of persons asked to take the survey)?
16. How many different households were represented by the person on the Church Assessment Roll? For example, a husband and wife would be 2 people on the church Assessment Roll, but count as only 1 household.
17. How many different households contributed financially to the church in the most recent year (those for whom you have a record of their contribution)?
18. Please enter the dollar amount of your total receipts in the past 12 months. Please INCLUDE income for capital campaigns, debt–reduction campaigns, and special mission offerings. (Please DO NOT INCLUDE income from endowments, income from facility rentals, preschool tuition, etc.)
19. Please enter the dollar amount of your total receipts 1 year earlier (same inclusions/exclusions apply).
20. Please enter the dollar amount of your total receipts 2 years earlier (same inclusions/exclusions apply).

## MAXIMIZE THE RETURN RATE

Maximizing participation in the assessment requires continuous reminders. Some guidelines and templates are provided below.

### EMAIL BLASTS

***After the initial launch, follow up with a reminder email blast every 3-4 days.***

#### *Sample First Email Reminder*

##### **DO WE KNOW YOUR STORY YET?**

A few days ago, you should have received the link to your CAT. If you haven't already, please set aside (fill in estimate of time) to complete the assessment. Your *personal story* is critical to your leaders as they plan for our future. ***Please make this a priority this week*** if you haven't already shared your experiences and perspectives by participating in this important process. For your convenience, the link to your CAT is provided again below.

[Insert CAT link]

Please remember - this link is not transferable. Please do not forward it.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions.

Many thanks,  
[Enter names of leadership team charged with the administration of the CAT.]

#### *Sample Second Email Reminder*

##### **IT IS SAID THAT CATS CAN SEE IN THE DARK, BUT THIS CAT CAN'T**

To be honest, we don't know if you have completed the CAT or not because each person's answers are anonymous. BUT, if you haven't already, please shed some light on your experiences at insert name of church. It will only take fill in estimate of time. For your convenience, the link to your CAT is provided again below. *Please Don't Keep Us In The Dark!*

[Insert CAT link]

Please remember - this link is not transferable. Please do not forward it.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

With our sincere gratitude,

[Enter names of leadership team charged with the administration of the CAT.]

### *Sample Third Email Reminder*

#### **ARE WE STILL IN THE DARK?**

Please do not underestimate the importance of your individual input into this process. If you have already shared your story – we know these reminders are getting tiresome – please know your contribution is greatly appreciated. BUT, we are still waiting to hear from some of you. Sharing your story will only take [fill in estimate of time], and no one can do it for you. Please shine the light on your experiences and opinions at fill in name of your church. Your input is absolutely anonymous. No light will shine on *you*, just your experiences as *only you* can tell them.

For your convenience, the link to your CAT is provided again below.

[Insert CAT link]

Remember - this link is not transferable so please do not forward it.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

With our sincere gratitude,

[Enter names of leadership team charged with the administration of the CAT.]

### *Sample Last Email Reminder*

#### **WE CAN'T WAIT MUCH LONGER**

If you haven't taken the CAT yet, you may be thinking that, by now, other people have said the same things you would say in one way or another. Friends and family may share your thoughts in some areas and some folks may share your thoughts in yet other areas. But, the truth is that there is *only one you*, and your unique combination of experiences and perceptions are what we need. Even if your answers are very similar to someone else's, that is still important information for the church to have. The results from this assessment need to shed light on *what* our members are feeling, and *how many* share those feelings. This is critical to guiding us on our journey together. *Please don't make the mistake of letting others speak for you.* Sharing your story will only take [fill in estimate of time], and this is your last chance. The window on this opportunity closes at [fill in time] on [fill in date]!

For your convenience, the link to your CAT is provided again below.

[Insert CAT link]

Remember – this link is not transferable so please do not forward it.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

With our sincere gratitude,  
[Enter names of leadership team charged with the administration of the CAT.]

## BULLETIN ANNOUNCEMENTS

### SAMPLES FOR FOLLOW-UP BULLETIN ARTICLES

These are just samples. Please feel free to customize the style and theme, however, we strongly suggest that the basic content stays intact. These are follow-up articles, which is to say, they are used after the CAT is launched.

#### *Bulletin Follow-up #1*

### THE TRAIN HAS LEFT THE STATION!

You have been hearing and reading about the Church Assessment Tool, and by now you should have received the link to the CAT. If you haven't already, please set aside [fill in estimate of time] to complete the assessment. The information gained from this tool will be critical to your leaders as they plan for our future. **Please make this a priority this week** if you haven't already shared your experiences and perspectives by participating in this important process.

If you need a paper copy, please stop by the office, and we will provide one for you along with a self-addressed stamped return envelope.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

Many thanks,  
[Enter names of leadership team charged with the administration of the CAT.]

#### *Bulletin Follow-up #2*

### HAVE YOU TAKEN YOUR SEAT YET?

**Now is the time** to share your story. We need to know how you think and feel about your experiences at [insert name of church]. We are asking for [fill in # minutes] of your time to help shape the future of our church. **How about making it a priority today** if you haven't already shared your perspectives by participating in this important process.

If you need a paper copy, please stop by the office, and we will provide one for you along with a self-addressed stamped return envelope.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

Our sincere thanks,  
[Enter names of leadership team charged with the administration of the CAT.]

### *Bulletin Follow-up #3*

#### **OUR DESTINATION IS IN SIGHT**

So many of you have shared your thoughts and feelings by completing the Church Assessment Tool. You have our gratitude. Rest assured that your responses are 100% confidential. If by chance you have not completed the assessment yet, you have just one more week to make your voice heard. ***How about today!***

If you need a paper copy, please stop by the office, and we will provide one for you along with a self-addressed stamped return envelope.

If you have questions, please contact [insert name and contact information of team member who is available to answer questions]

Many thanks,  
[Enter names of leadership team charged with the administration of the CAT.]

### *Final Bulletin Follow-up*

#### **LAST STOP! HEAR THE WHISTLE BLOWING?**

We are coming to the end of the first step in shaping our future together. On [insert date] at [insert time], the window of opportunity to join us on this journey will close. You are probably one of many who have already shared their experiences and perspectives. If you have not, this is your last chance. Although our response rate has been great, if we don't have your input, we are still missing an important piece of the puzzle. PLEASE - share your opinions with us using this highly confidential assessment instrument.

If you need a paper copy, please stop by the office, and we will provide one for you along with a self-addressed stamped return envelope.

If you have questions, please contact [insert name and contact information of team member] who is available to answer questions

A very special thanks to everyone who has participated in this process,  
[Enter names of leadership team charged with the administration of the CAT.]

## OTHER IDEAS

- Appoint someone whenever people gather to make a short appeal. This includes worship, coffee hour, choir practice, committee meetings, education classes, pot luck dinners, and any other place and time you can think of.
- Try something fun and unique to encourage participation. Some churches have handed out small kit-kat bars, others cat or cow buttons/stickers. Some have built a CAT goal meter and placed in a prominent location displaying the number of folks who have participated. One church even had a member who collected CAT sweaters and wore a different one each Sunday when she made the appeal in worship.
- Have fun with it but be persistent!

# HOLY COW CONSULTANT HANDBOOK

## REVITALIZATION PROCESS AND REPORTING

*(A fillable version of this form is available on the Presbytery website.)*

| Consultant Name | Congregation Assigned | Start Date | Anticipated Completion | Actual Completion |
|-----------------|-----------------------|------------|------------------------|-------------------|
|                 |                       |            |                        |                   |

| Anticipated Date | Completed Date | Item                                                       |
|------------------|----------------|------------------------------------------------------------|
| _____            | _____          | Session Introduction                                       |
| _____            | _____          | Session Agreement to Engage the Holy Cow! process          |
| _____            | _____          | Session approves Local Arrangements Team (See below)       |
| _____            | _____          | Local Arrangements Team Trained                            |
| _____            | _____          | Holy Cow! contacted                                        |
| _____            | _____          | Promotions begin                                           |
| _____            | _____          | Request MissionInsite demographic study                    |
| _____            | _____          | End date for questionnaire completion                      |
| _____            | _____          | Received results from Holy Cow! Consultants                |
| _____            | _____          | Receive results from MissionInsite                         |
| _____            | _____          | Completed Interpretation of Results                        |
| _____            | _____          | Presentation of data to session                            |
| _____            | _____          | Presentation of data to Congregation                       |
| _____            | _____          | Session appoints Revitalization Task Force (See below)     |
| _____            | _____          | Engage Ongoing Support for Transition Team                 |
| _____            | _____          | Final report to Committee on Congregational Revitalization |

### Notes:

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# LOCAL ARRANGEMENTS TEAM

## PROCESS FOR HOLY COW! ASSESSMENT

*(A fillable version of this form is available on the Presbytery website.)*

| Name  | Phone | Email |
|-------|-------|-------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

| Anticipated Date | Completed Date | Item                                                                |
|------------------|----------------|---------------------------------------------------------------------|
| _____            | _____          | Clarify who can/should participate in the Holy Cow! Assessment      |
| _____            | _____          | Set start date and deadline for ending responses for Holy Cow!      |
| _____            | _____          | assessment                                                          |
| _____            | _____          | Start _____ End _____                                               |
| _____            | _____          | Establish method(s) for helping those without computer              |
| _____            | _____          | access/knowledge                                                    |
| _____            | _____          | _____                                                               |
| _____            | _____          | _____                                                               |
| _____            | _____          | _____                                                               |
| _____            | _____          | Develop Assessment Tool promotional announcements for congregation. |
| _____            | _____          | Plans for continuous and enthusiastic promotion of participation    |
| _____            | _____          | _____                                                               |
| _____            | _____          | _____                                                               |
| _____            | _____          | _____                                                               |
| _____            | _____          | Presentation of publicity dates                                     |
| _____            | _____          | _____ Round One _____ Round Two _____ Round Three                   |
| _____            | _____          | CAT is engaged                                                      |
| _____            | _____          | Deadline for submission is reached.                                 |
| _____            | _____          | Consultant translates results                                       |

## REVITALIZATION TEAM MEMBERS

*(A fillable version of this form is available on the Presbytery website.)*

| Name  | Phone | Email |
|-------|-------|-------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

## PROCESS

Be deeply in prayer as you seek God's guidance for the ministry to which God is leading. This is first and foremost for remaining faithful to what and where God is unfolding for you.

Reflect deeply over the information gleaned from the Holy Cow! analysis and what the congregation has said about itself. Discern strengths, weaknesses, and passions expressed.

Reflect deeply over information presented by the demographic study from MissionInsite. What is being said about the make-up of the surrounding community, its perceived needs, its future life.

How do the congregation's gifts and the needs and make-up of the community match? How may the congregation be of service in the community, reflecting the love and presence of Jesus Christ?

| Anticipated<br>Date | Completed<br>Date | Item                                                                                                                                                            |
|---------------------|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| _____               | _____             | Discuss the following from Holy Cow! Analysis: the congregation's health and energy level; what the congregation seems to be saying about its future direction. |
| _____               | _____             | Discuss MissionInsite information to determine trends in the area surrounding the church.                                                                       |
| _____               | _____             | Discuss how the congregation's analysis and demographic data may or may not be compatible.                                                                      |

## PLAN OF ACTION

*(A fillable version of this form is available on the Presbytery website.)*

On any journey, it is very helpful to know in what direction you are heading. You are now embarking upon a new journey of life and ministry. Where are you ultimately being led by God's Holy Spirit? How will you know you are on the correct path? Sometimes it is by trial and error, trial and success. As you continue to be in prayer over the Holy Cow! and MissionInsite materials, discern where God is leading your congregation. What steps need to be explored and put into place? Be sure to start small. Change can be challenging for many folks.

Put together some long-term goals, and with each one, discern short-term steps to put into place that will lead toward your ultimate goal. Establish a plan of action with timelines, benchmarks, and persons responsible for various steps.

In addition to expected successes, you may also expect some failures. This is normal, so don't be surprised. And instead of seeing failures as failures, look at them as lessons learned as simply something that doesn't work, and move on to the next challenge.

### STRATEGIC PLAN ONE

What is your first Strategic Plan? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### First Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_  
\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_\_ No \_\_\_\_ Reason: \_\_\_\_\_  
\_\_\_\_\_

Continue? Yes \_\_\_\_ No \_\_\_\_

## Second Step to Attain this Plan

(A fillable version of this form is available on the Presbytery website.)

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

\_\_\_\_\_

Continue? Yes \_\_\_ No \_\_\_

## Third Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

\_\_\_\_\_

Continue? Yes \_\_\_ No \_\_\_

### Notes:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface. There is no handwriting or other markings on the paper.

## STRATEGIC PLAN TWO

(A fillable version of this form is available on the Presbytery website.)

What is your second Strategic Plan? \_\_\_\_\_

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### First Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

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When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

---

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

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Continue? Yes \_\_\_ No \_\_\_

### Second Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

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When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

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Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

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Continue? Yes \_\_\_ No \_\_\_

### Third Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

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When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

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Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

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Continue? Yes \_\_\_\_ No \_\_\_\_

**Notes:**

[illegible]

## STRATEGIC PLAN THREE

(A fillable version of this form is available on the Presbytery website.)

What is your second long-term goal? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### First Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

\_\_\_\_\_

Continue? Yes \_\_\_ No \_\_\_

### Second Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_

\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_ No \_\_\_ Reason: \_\_\_\_\_

\_\_\_\_\_

Continue? Yes \_\_\_ No \_\_\_

### Third Step to Attain this Plan

What: \_\_\_\_\_

Whom to Lead: \_\_\_\_\_

How: \_\_\_\_\_  
\_\_\_\_\_

When to Start: \_\_\_\_\_

Benchmark(s) (to know if step is effective): \_\_\_\_\_  
\_\_\_\_\_

Date of Benchmark(s) check: \_\_\_\_\_

Success? Yes \_\_\_\_ No \_\_\_\_ Reason: \_\_\_\_\_  
\_\_\_\_\_

Continue? Yes \_\_\_\_ No \_\_\_\_

#### Notes:

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