

# CONGREGATIONAL DATA COLLECTION SHEET

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

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

CONGREGATION name St. Bartholomew, Pewaukee, WI

From the Parochial Report for the year of 2016 (being prepared)

360 Number of Baptized Members

0 Number of Confirmations

1 Number of Baptisms

6 Number of Burials

0 Number of Marriages

325 Number of Confirmed Communicants

Attach to this document if you have the following:

The mission and/or vision statement, *See page 4 in the 2016 Annual Report booklet.*

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

## FINANCIAL STEWARDSHIP

For this current year:

70 Number of Pledges \$3070 Mean (average) and \$1200 Median Pledge

\$215K Total amount (\$) pledged

\$317K Total Revenue from Parish Giving/Fundraising

94 % Budget from Parish Giving 6 % Budget from Endowment/Savings

\$413K Total Expenditures

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

☒ A Stewardship Committee that meets year-round

☐ Vestry has and uses a Vestry Financial Stewardship Statement

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

☒ Annual Appeal Letter

☐ Festive Meal

☐ Every Member Canvas

☐ Cottage/Small Group Meetings

☐ Other (describe) \_\_\_\_\_

## WORSHIP

### Sunday Worship:

101 Number of Sunday Services Service Time(s) 8:30 a.m., 10:45 a.m., 11:00 a.m.

→ Average Sunday attendance (ASA) at each service 65 30

### Average Sunday Attendance:

91 July-August 96 September-June

### Weekday Worship:

63 Number of Weekday Services 45 Average weekday attendance

Continue through summer? yes

### Typical Style of Worship (check all that apply):

☐ Holy Eucharist Rite I ☒ Morning prayer (some weekdays)

☒ Holy Eucharist Rite II

Regular services outside church (e.g. at nursing homes)? No

How often? —

Describe: —

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

Ash Wednesday, Holy Week, St. Bartholomew Day

### Weekly traditions:

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

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

Wed. evening healing service, weekly, all year.

### Music

What hymnal sources do you use? 1982 Hymnal @ 8:30 a.m.;

10:45 a.m. = various sources, congregation sees music projected on large screen

Who selects the music? 8:30: Organist, using J. Kucharski's published list, with clergy oversight.  
10:45: Praise Band leader, with clergy input and oversight.

Is the service ever sung? Yes ☐ No ☒ When?

Do you have a choir? Yes ☐ No ☒ When do they rehearse? (disolved 2016)

Do you have a children's choir? If so, when do they sing? No

What services does the choir sing? Formerly at 8:30 service.

Year round? No

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

Varies with clergy preferences.

### Worship Ministers

Acolytes: Yes ☒ No ☐

Who directs them? Dave Bergles (Verger)

Phone number/e-mail:

Eucharistic Ministers: Yes ☒ No ☐

Who directs them? Clergy; scheduled by Jim Bast

Phone number/e-mail:

Worship Leaders: Yes ☒ No ☐

Who directs them? 7:00 a.m. outdoor Morning Prayer led by Jan Watter

Phone number/e-mail:



**Lectors:** Yes ☒ No ☐

Who directs them? Scheduled by Parish Administrator

Phone number/e-mail: \_\_\_\_\_

**Eucharistic Visitors:** Yes ☒ No ☐

Who directs them? Joan Hart

Phone number/e-mail: \_\_\_\_\_

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

Yes Yes Yes

**Altar Guild:** Yes ☒ No ☐

Who directs them? \_\_\_\_\_

Phone number/e-mail: \_\_\_\_\_

**Ushers:** Yes ☒ No ☐

Who directs them? Scheduled by Parish Administrator

Phone number/e-mail: \_\_\_\_\_

**Greeters:** Yes ☐ No ☒

Who directs them? \_\_\_\_\_

Phone number/e-mail: \_\_\_\_\_

**Other Worship Ministries?** (describe)

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

## ADMINISTRATION

Do you have congregational by-laws? Yes

Date of last revision? January 2016

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

## Staff

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

Who supervises staff members? Clergy and/or Executive Committee

Who evaluates staff? \_\_\_\_\_

Is there a formal process? No

Who hires/fires? \_\_\_\_\_

## Parish Records

Service Register up to date? Yes Where is it? Sacristy

Parish Register up to date? Yes Where is it? Church office

(Parish Register no longer contains names of Baptized Members.)

Where are Baptism, Marriage, Burial, and Confirmation Books? In Parish Register

Where is Parish Directory/Information about Parishioners? Servant Keeper computer file.

Who maintains records? Office staff

Where and how are confidential records kept? Limited password access to

Servant Keeper files; financial records limited to need-to-know.

Where and how are records of transfer kept? Originals in file folder in

church office.

Who has access to congregational files? Office staff, clergy, wardens.

## Financial Records

Last audit? 2013 By whom? Firm hired by Milw. Diocese.

Who pays the bills and payroll? Financial Administrator

Who deposits money? \_\_\_\_\_

Who signs checks? Treasurer, or current or previous Sn. Warden Emeritas.

Who maintains pledge records? Sharon Strack

Who counts money? Pairs of parishioners, scheduled by Parish Administrator

Where are financial records kept? In custody of Financial Administrator

What types of accounts are there? Checking/Savings, CD, Designated Gifts money

Which are restricted and unrestricted? Designated Gifts restricted, others not.

Do you have an Endowment? Yes Amount \$ 17 K

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

### PROPERTY

Who schedules use of church property? Parish Administrator

Who coordinates and keeps track of keyholders? \_\_\_\_\_

Who has keys? Building accessible via coded lock.

How many pieces of property/what kind? Church location only.

Do you have a written record / history of repairs? No

Who keeps this? \_\_\_\_\_

Present state of repairs? Up-to-date

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

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

Items of particular historical or monetary value (list)? No

Is there security for valuables? Yes



Insurance? Yes With whom? Church Insurance Agency Corp. Adequate? Yes

Do you have an Inventory of Property? No Done when? \_\_\_\_\_

Where is it? \_\_\_\_\_

Fire alarm/sprinkler system? No When last tested? \_\_\_\_\_

Fire extinguishers last tested Tested annually, checked monthly

Handicapped accessibility into all facilities? Yes Plans for such? Done.

Cemetery or Columbarium? Yes Records up to date? Yes

Who keeps this record? Parish Administrator

Affiliated day or boarding school? No Grades: \_\_\_\_\_

Number of students \_\_\_\_\_ Number of teachers \_\_\_\_\_

Relationship to congregation, especially in terms of governance? \_\_\_\_\_

Other affiliated organization(s)? No

Describe: \_\_\_\_\_

## CHRISTIAN FORMATION

### Church School

Number of students 27 Grades Pre-k thru 6, plus middle school.

Number of teachers 3, plus 10 rotating assistants.

Name of Curriculum(a) used: Catechesis of the Good Shepherd

Adult Education: Yes

Courses/programs offered: Between Sunday services

Number participating Typically 8-10

Do you have congregation-sponsored retreats? No

When was the most recent? —

What was the topic? —

Do you offer (check all that apply):

New Member education X Confirmation preparation —

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

Bible study X

### EVANGELISM

Specific Programs and Activities Much improved website, new Facebook page, ads in local newspaper and "Worship at the Church of Your Choice"

Leadership? Designated Vestry member

Population targeted? General, and families who would like our Church School.

Committee? —

### PASTORAL CARE

Who does it? Clergy and Community of Hope trained laity.

For whom? Personal crisis counseling, hospital and nursing home patients.

### OUTREACH/SERVICE TO THE NEEDS OF THE WORLD

Specific Programs Refugee ministry (16 years)

Who coordinates these? Vestry committee

Number of people involved Many!



## COMMUNITY/ECUMENICAL/INTERFAITH INVOLVEMENT

Current involvement in community, ecumenical or interfaith groups? Yes.

List the group(s) and provide contact information: Many members are quite active in groups such as food pantries, and gather on-site support within the congregation.

## EPISCOPAL IDENTITY/ETHOS

Involvement in Diocesan activities Members on Standing Committee and on Executive Committee. Participate in Lake Country Episcopal Churches.

Timely payment of Diocesan Assessment/Asking? Yes

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

United Thank Offering —

Presiding Bishop's Fund —

Episcopal Relief and Development —