

CLERK'S ANNUAL QUESTIONNAIRE FOR YEAR ENDING DECEMBER 31, 2011
Return to Presbytery Clerk By _____ 2012

NAME OF CHURCH		MAILING ADDRESS OF CHURCH
LOCATION OF CHURCH: CITY OR TOWN		LOCATION OF CHURCH: STATE
CHURCH PIN	PRESBYTERY	SYNOD

Clerk of Session May Find it Necessary to Consult with Pastors, Treasurers, or Other Leaders on Some Questions.

The reason for asking each question can be found on the back page.

Please complete form on the web: www.pcusa.org/clerks2011

Guest Preachers

- Q-1. The 1999 General Assembly urged all congregations to *invite* racial-ethnic ministers to preach during Sunday worship services at least annually. Did your congregation invite a racial-ethnic minister (other than your pastor if he or she is a racial-ethnic minister) to preach during 2011?
- ☐₁ Yes → Q-1a. If yes, on how many Sundays in 2011 did a racial-ethnic minister serve as guest preacher? (If all invitations were turned down, enter "0"—zero.) _____
- ☐₂ No → Q-1b. If no, when was the last time your congregation invited a racial-ethnic minister to preach there?
- | | |
|---|--|
| <input type="checkbox"/> ₁ During 2010 | <input type="checkbox"/> ₄ 7-9 years ago |
| <input type="checkbox"/> ₂ 2-3 years ago | <input type="checkbox"/> ₅ 10 years ago or more |
| <input type="checkbox"/> ₃ 4-6 years ago | <input type="checkbox"/> ₆ Never/don't know |

Transfer of Members

- Q-2. During 2011, how many new members did your congregation receive via certificate of transfer from another congregation? _____ If none, enter "0" (zero) and then skip to Q-4.
- Q-3. Of that number: (Numbers below should total to the number in Q-2.)
- a. How many transferred from another PC(USA) congregation? _____
- b. How many transferred from a non-PC(USA) congregation? _____
- Q-4. During 2011, how many members of your congregation were dismissed to another congregation via a certificate of transfer? _____ If none, enter "0" (zero) and then skip to Q-6.
- Q-5. Of that number: (Numbers below should total to the number in Q-4.)
- a. How many transferred to another PC(USA) congregation? _____
- b. How many transferred to a non-PC(USA) congregation? _____

Immigrants

- Q-6. Indicate whether your congregation has each of the following:
- | | Yes | No | Not Sure |
|--|---------------------------------------|---------------------------------------|---------------------------------------|
| a. One or more recent immigrants to the United States (moved here since 1990) who regularly attend worship services or other activities of your congregation | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ | <input type="checkbox"/> ₃ |
| b. A group of immigrants who hold a regular worship service in their native language in your facilities | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ | <input type="checkbox"/> ₃ |
| c. One or more ministries focused specifically on immigrants, such as an English as a Second Language (ESL) program, a legal clinic for immigrants, an after-school program for immigrant children, sponsorship of a refugee family, etc. | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ | <input type="checkbox"/> ₃ |
| d. Other connection to immigrants (specify): | <input type="checkbox"/> ₁ | <input type="checkbox"/> ₂ | <input type="checkbox"/> ₃ |

- Q-7. If yes to any of the items in Q-6, please provide the name and e-mail address of someone in your congregation who would be able to provide more detailed information on immigrant groups and immigrant ministries in your congregation:

Name of this person: _____

E-mail of this person: _____

(please print)

World Mission

Q-8. Does your congregation have a committee that focuses some or all of its attention on world (or international) mission?

- ☐₁ Yes → Q-8a. Name of contact person for this committee: _____
☐₂ No E-mail of this person: _____

(please print)

Q-8b. Would the contact person for this committee like to receive World Mission's monthly electronic newsletter about Presbyterian mission work around the world?

- ☐₁ Yes
☐₂ No
☐₃ Don't know

Q-9. Does your congregation have a relationship with one or more missionaries or mission workers?

- ☐₁ Yes → Q-9a. Which mission sending agency sent the missionary(ies) or mission worker(s) with which your congregation has a relationship? (Check **all** that apply.)
☐₂ No
- ☐₁ PC(USA) World Mission
☐₂ The Antioch Partners (Presbyterian Frontier Fellowship or The Outreach Foundation)
☐₃ Other agency (please specify): _____
☐₄ Independently, as a congregation
☐₅ Don't know

Q-9b. How does your congregation engage in a relationship with the missionary(ies) or mission worker(s)? (Check **all** that apply.)

- ☐₁ Communications (e.g., letters, blogs, e-mail, Skype)
☐₂ Planning and implementing mission projects together
☐₃ Engaging groups in our church to relate with him/her/them (e.g., children's groups exchanging Christmas cards, Presbyterian Women sending a prayer shawl, etc.)
☐₄ Face-to-face visits in the United States
☐₅ Financial support
☐₆ Prayer
☐₇ Members visiting the mission site
☐₈ Other (please specify): _____

Q-10. Would your congregation like to receive information about how to develop a relationship with a missionary or mission worker?

- ☐₁ Yes → Q-10a. Name of person to receive this information: _____
☐₂ No E-mail of this person: _____

(please print)

Self-Development of People

Q-11. Self-Development of People (SDOP) is a ministry of the General Assembly Mission Council that partners with groups of poor, oppressed, and disadvantaged people to change structures that perpetuate poverty and injustice. Is there a person in your congregation who might be interested in serving as a liaison between your congregation and the SDOP national office? A liaison is someone interested in networking with SDOP who would receive and share information with the congregation about the ministry. SDOP will send this person information, at which time he/she can decide whether to become a liaison.

- ☐₁ Yes → Q-11a. Name of person to receive this information: _____
☐₂ No E-mail of this person: _____

(please print)

Communications and Funds Development

Q-12. Would your session be willing to provide to the General Assembly Mission Council (GAMC) a copy of your church directory so that we can give your members information about Presbyterian mission and ministry on an on-going basis?

- ☐₁ Yes → Q-12a. Name of person GAMC can contact to obtain directory: _____
☐₂ No E-mail of this person: _____

(please print)

Q-13. Does your congregation have a stewardship committee?

- ☐₁ Yes → Q-13a. Please provide chair's name and e-mail address to become part of a stewardship network:
☐₂ No Chair's name: _____
E-mail of this person: _____

(please print)

- Q-14. Has your congregation or anyone in your congregation donated funds for disaster relief or mission work in Haiti since the earthquake there in January 2010? (Check ***all*** that apply.)
- ☐1 Yes, the congregation has
- ☐2 Yes, individuals in the congregation have
- ☐3 No
- ☐4 Don't know
- Q-15. Has anyone in your congregation gone to Haiti to do disaster relief or mission work since the January 2010 earthquake there? (Check ***all*** that apply.)
- ☐1 Yes, the congregation has sent someone or a group to Haiti
- ☐2 Yes, one or more people in the congregation have gone to Haiti, but they were not officially sent by our congregation
- ☐3 No
- ☐4 Don't know
- Q-16. Is your congregation or a group within it planning or considering a mission trip to Haiti in 2012 or 2013?
- ☐1 Yes
- ☐2 No
- ☐3 Don't know
- Q-17. Would anyone in your congregation like to receive information about effective mission work in Haiti?
- ☐1 Yes → Q-17a. Name of person to receive this information: _____
- ☐2 No E-mail of this person: _____

(please print)

Economic Issues

- Q-18. How would you describe the economic health of your local community?
- ☐1 Excellent
- ☐2 Good
- ☐3 Fair
- ☐4 Poor
- ☐5 Severely depressed
- Q-19. How many members are currently unemployed and looking for work or are discouraged workers who have quit looking for work? (Write in the number. Please estimate if you are not sure. Do not include retired people, students, people who do not work due to disabilities, full-time homemakers, or children under age 18.) _____ members
- Q-20. Did your congregation or anyone in it provide any form of financial support for one or more unemployed members during 2011? (Check ***all*** that apply.)
- ☐1 Yes, an individual member did with his/her own money
- ☐2 Yes, the pastor or other staff did, using congregational funds
- ☐3 Yes, the session did, using congregational funds
- ☐4 Yes, another church group did, using congregational funds
- ☐5 No
- ☐6 Not sure
- Q-21. How important is it for the church to address the Christian faith dimensions of the following economic concerns?
- | | Very Important | Important | Not Very Important | Not at All Important | Not Sure |
|--|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| a. Moral values in business and commerce..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| b. Fair taxation policies..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| c. Fair wages | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| d. Local and national government deficits | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| e. Investment in infrastructure and public goods | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| f. Economic security in retirement..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
| g. Contributions to political candidates..... | <input type="checkbox"/> 1 | <input type="checkbox"/> 2 | <input type="checkbox"/> 3 | <input type="checkbox"/> 4 | <input type="checkbox"/> 5 |
- Q-22. To receive information on social ministry and social witness resources from the Advisory Committee on Social Witness Policy (justiceunbound.org) and the Compassion, Peace and Justice Ministry Area, please provide contact information for someone in your congregation who is involved in mission or peacemaking:

Name of person to receive this information: _____

E-mail of this person: _____

(please print)

Special Offerings

- Q-23. Please indicate whether your congregation received each of the four churchwide special offerings during 2011. Then, for each offering received, please provide the name of the committee that is responsible for interpretation and promotion of the offering, along with the name and e-mail address of the committee chair or other contact person in the congregation who is most familiar with that special offering.

	<u>Received?</u>		Committee Name:	Chair or Other Contact Person:	Contact Person's E-mail Address:
No	Yes				
a. One Great Hour of Sharing ..	<input type="checkbox"/> 1	<input type="checkbox"/> 2 →			
b. Pentecost	<input type="checkbox"/> 1	<input type="checkbox"/> 2 →			
c. Peacemaking	<input type="checkbox"/> 1	<input type="checkbox"/> 2 →			
d. Christmas Joy	<input type="checkbox"/> 1	<input type="checkbox"/> 2 →			

Congregational Endowments

- Q-24. Does your congregation have an endowment (funds or property that was donated to the church and is now a source of income)?

☐1 Yes

☐2 No → *Skip to Q-31*

- Q-25. Does your congregation have an investment policy to guide management of the endowment?

☐1 Yes

☐2 No

- Q-26. Who manages the endowment? (Check **all** that apply.)

☐1 A church committee

☐2 A financial advisor

☐3 A bank

☐4 An investment firm

☐5 The church treasurer

☐6 The Presbyterian Church (U.S.A) Foundation

☐7 Other (please specify): _____

- Q-27. Is any of your endowment invested in stocks?

☐1 Yes

☐2 No

- Q-28. Is any of your endowment invested in mutual funds?

☐1 Yes

☐2 No

- Q-29. Does your congregation avoid investing endowment funds in certain industries or companies?

☐1 Yes

☐2 No

- Q-30. Do you:

	Yes	No	Don't Know	Not Applicable
a. Vote your own proxies?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
b. Give voting instructions to your financial advisor?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

Bequests and Major Gifts

- Q-31. How many **bequests** did your congregation receive in 2011? Bequests are gifts of money, stocks, or other property left to the church through a will when someone dies. If none, write "0" (zero).

Number of bequests received in 2011: _____

Total **value** of these bequests: \$ _____

- Q-32. How many **other gifts from estates** did your congregation receive in 2011? Other gifts are those that result when someone dies and has named the church as a beneficiary of a life insurance policy, retirement account, trust, or gift annuity. If none, write "0" (zero).

Number of other gifts from estates received in 2011: _____

Total **value** of all such gifts: \$ _____

Q-33. Does your congregation have in place a program to encourage each of the following types of giving to your congregation?

	Yes	No	Not Sure
a. Pledging	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
b. Tithing.....	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
c. Giving to special projects of the church.....	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
d. Making a planned or other major gift to the church	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
e. Making a bequest to the church	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3

Q-34. In the last two years, has your congregation received any inquiries from members who were interested in charitable or planned giving to your congregation (that is, setting up gift annuities, charitable trusts, life insurance, or retirement accounts in which the congregation is the beneficiary)?

☐1 Yes
☐2 No → Skip to Q-37
☐3 Not sure →

Q-35. How many members made such inquiries in the past two years? (Please estimate the number of people in the past two years.) _____ members

Q-36. To whom were people making such inquiries referred? (Check **all** that apply.)

☐1 To someone on the church staff (a development officer, treasurer, etc.)
☐2 To a member of the church who is an estate or financial planner
☐3 To an estate or financial planner outside the church
☐4 To a Presbyterian Foundation development officer
☐5 To the development officer of another Christian organization
☐6 To the development officer of a secular organization
☐7 Other (please specify): _____
☐8 Not sure
☐9 No one/not referred

Other Financial Information

Q-37. Does your congregation have a loan or loans with any of the following groups or institutions? (Check **all** that apply and indicate the approximate balance and interest rate on loans in each category.)

	Approximate Balance:	Interest Rate (%):
<input type="checkbox"/> 1 Banks or financial institutions	\$ _____	_____
<input type="checkbox"/> 2 Presbyterian Investment & Loan Program (PILP).....	\$ _____	_____
<input type="checkbox"/> 3 General Assembly Loan Program	\$ _____	_____
<input type="checkbox"/> 4 Presbytery or synod	\$ _____	_____
<input type="checkbox"/> 5 Other (specify): _____	\$ _____	_____
<input type="checkbox"/> 6 No loans		

Q-38. Does your congregation plan to expand or renovate your facilities within the next two years?

☐1 Yes, definitely → Q-38a. What is the estimated cost of the project(s) (if known)? \$ _____
☐2 Yes, possibly
☐3 No

Q-38b. Will this project require a capital campaign (a special fundraising effort)?
☐1 Yes, definitely
☐2 Yes, possibly
☐3 No

Q-39. Does your congregation currently have funds in any of the following financial instruments? (Check ***all*** that apply and indicate the approximate amount invested in each. Include any endowment funds noted on page 4.)

Approximate Amount Invested:

- ☐1 Certificates of deposit \$ _____
- ☐2 Money market accounts \$ _____
- ☐3 Bonds or treasuries \$ _____
- ☐4 Stocks or mutual funds \$ _____
- ☐5 Savings accounts \$ _____
- ☐6 Other (specify): _____ \$ _____
- ☐7 None of the above → *Skip past Q-40*

Q-40. Who manages your funds? (Check ***all*** that apply.)

- ☐1 A brokerage/investment firm
- ☐2 New Covenant Funds/Presbyterian Foundation
- ☐3 A bank
- ☐4 We manage them ourselves
- ☐5 Other (please specify): _____

Questions? Call Research Services at 800-728-7228, ext. 2040. Thank you for completing this survey.
Responses can be submitted on the web: www.pcusa.org/clerks2011

Reasons for These Questions:

Guest Preachers: The Office of the General Assembly asks these questions in response to a General Assembly mandate.

Transfer of Members: Research Services asks these questions to learn how many members transferring into and out of congregations are staying within the PC(USA) and how many are not.

Immigrants: The Racial Ethnic and Women's Ministries/PW ministry area asks these questions to learn about immigrant groups and immigrant ministries in congregations.

World Mission: The World Mission ministry area asks these questions to be able to communicate directly with congregations regarding international mission.

Self-Development of People: The Self-Development of People office asks these questions to find churches interested in the Self-Development of People ministry.

Communication and Funds Development: The Communication and Funds Development office asks these questions to provide congregations with information about Presbyterian mission.

Economic Issues: The Advisory Committee on Social Witness policy asks these questions to help develop, interpret, and monitor policies that encourage and challenge the church and society to act faithfully to God's call to do justice.

Special Offerings: The Mission Interpretation office asks these questions to obtain contact information for those who use special offerings materials.

Congregational Endowments: The Mission Responsibility Through Investment (MRTI) office asks these questions to learn about church endowments.

Bequests and Major Gifts: The Presbyterian Church Foundation asks these questions to learn about congregational giving trends and needs.

Other Financial Information: The Presbyterian Investment & Loan Program asks these questions to determine which churches might benefit from PILP's low-cost loans and investment products.