

Vision and Planning

November and December 2017

Missionaries and Visionaries

Linda Buskirk

God bless the missionaries in our congregations. They are the do-ers. At most churches, almost everyone jumps in for some mission service – bringing food for the pantry, serving as acolytes, ushers, choir members, etc.

Sometimes our missionaries get spread very thin. Sometimes so many people are doing so many things that it's difficult to perceive the fruits of their labors. One to three people may run a great ministry, but it is viewed as "theirs" and few others join or are aware. This can lead to burn-out in the core group, who may become resentful that others don't share in the work.

That's when *visionaries* can inspire renewal. Before you say, "Oh, we don't have any of those," let's examine what vision really is, and its power.

A dream for the future

When Dr. Martin Luther King, Jr. rallied 250,000 people to Washington, D.C. for the March for Jobs and Freedom in 1963, he described his dream for America. His 17 minute speech never called for new federal legislation.

What Dr. King described was a dream that... "my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character."

Dr. King did *not* say that federal laws should prohibit separate seating in restaurants, but he did say, “I have a dream that one day on the red hills of Georgia the sons of former slaves and the sons of former slave owners will be able to sit down together at the table of brotherhood.”

Dr. King painted pictures of what the *impact* of the mission of the civil rights movement could be. Within two years of Dr. King's speech, several federal acts created sweeping reform. Dr. King's ability to describe a vision finally got hearts and minds to work together for change.

Vision describes the desired *impact* of your mission. In congregations, vision is often born from identifying gifts for ministry.

Six years ago, the Episcopal faith community of St. Paul's, New Albany, Indiana, explored the gifts of its people and what God was calling them to do with those gifts. Several people had a passion for the arts – many were artists themselves. They envisioned the arts as central to their ministry. The vision grew to be an [extraordinary arts outreach](#) that blesses their downtown and generates funding to support their feeding ministry.

The power of visioning

It was a large estate gift several years ago that prompted the congregation of Trinity Logansport, Diocese of Northern Indiana, to start thinking about future impact. With an identified desire to serve and to preserve their ministry home, Trinity's missionaries became visionaries, directing that half of the fund's annual proceeds would support outreach ministry and half would go to building maintenance. They deposited the gift at the local community foundation which at the time matched the investment dollar for dollar. But if you conclude that *that's* how Trinity Logansport “affords” its ministries, you are not realizing the full power of vision.

Rector Clark Miller explains, “When we started looking outside our walls, we started to grow. When you start giving things, things come back to you. The people of Trinity give willingly of their money and time. People don't say, ‘let the endowment take care of it’ – they jump in to help.”

This congregation with average Sunday attendance of 65 supports an [annual school backpack project](#) which distributes 750+ backpacks filled with all the supplies students need. Other congregations in Logansport have caught the vision, rejoicing in the impact of backpack ministry.

Without an expressed, shared vision for the impact of ministries, the people of a congregation can wander aimlessly, missing opportunities for impact that God has gifted them to achieve. Even in a small parish where it's "all hands-on-deck" to provide ministry, the vestry has a very important big picture role to provide the vision towards which all operations are heading. Articulating a vision is one of the most strategic leadership actions a vestry can take.

And don't stop there. Refer to the vision when making important decisions, especially when crafting the budget and annual programs. Affirm that decisions about using talents and treasures are leading toward the vision, not drifting in a different direction.

Sometimes vestry members outright refuse to spend time "visioning" because they think it's light and fluffy, and they have really important issues and crises to think about right now, and they don't have time to sit around and think moonbeam thoughts so let's just set some goals and ask people to give more in annual stewardship. Whew!

Strategic visioning calls us to take a deep breath and think beyond the daily routine's worries and burning fires. It offers the opportunity to listen deeply as people of the congregation describe what they love to do with their gifts, and what they truly want to share with others.

When the listening is done, **describe** the **desired impact** of the church's ministries, or of your existence or presence in your community, or the world. What will be different? Think beyond, "the pews will be filled." Describe how lives will be changed, how hearts will be mended, how Jesus Christ will be known and glorified. As visionaries, the pictures you paint with words will inspire many missionaries to jump in to help make the vision come true.

Linda Buskirk is a capital campaign and strategic solutions consultant for the [Episcopal Church Foundation](#). She brings to ECF diverse experience as a consultant to social-profit agencies, specializing in board governance and strategic development. Linda has a masters degree in public affairs from Indiana University. She lives in Fort Wayne, Indiana, where she and husband Ron are members of Trinity Episcopal Church. She is a graduate of the Congregational Development Institute of the Diocese of Northern Indiana. Linda serves her parish and diocese in many capacities, including roles in stewardship and communications ministries.

Resources

- [Vision for Impact, Not Just Change](#) by Linda Buskirk, Vestry Papers, July 2014
- [The Difference Between Mission and Vision](#) by Linda Buskirk, ECF Vital Practices Blog, January 13, 2012

- [Strategic Thinking for Congregations](#) an ECF webinar led by Donald Romanik, April 23, 2015
- [The Power of a Shared Nightmare](#) by Miguel Escobar, ECF Vital Practices Blog, January 29, 2013
- [Cultivating the Missional Church: New Soil for Growing Vestries and Leaders](#) by Randolph C. Ferebee (Morehouse Publishing, 2012)

The Process of Creating a Mission/Vision Statement

Members of St Philip's Church

Representing St. Philip's Church Boot Camp Leadership Team from the Episcopal Diocese of New York, we all attended the Episcopal Church Foundation's (ECF) [pilot "Boot Camp"](#) in Baltimore, MD in October 2016. This Boot Camp, part of [ECF's Lilly Endowment National Initiative](#) to address the economic challenges facing pastoral leaders, is designed for newer clergy and their lay leaders to provide training and planning on how to collectively meet the financial and leadership challenges of congregational ministry in the 21st century.

This two-day, in-person event was inspiring and spiritually uplifting. Boot Camp generated great camaraderie among fellow Episcopalians; there was a shared focus on challenges and how we can benefit from best practices.

Prior to Boot Camp, our pre-work identified three essential facts about St. Philip's Church on a [storyboard](#), as follows:

- Is a Parish in transition (since we were without a permanent Rector)
- Is a historic and predominately African-American Parish
- From its inception, has a history of advocating and fighting for justice. (Everyone is not aware of this).

Our Next Steps Priority

Upon returning from Boot Camp, our priority was to redefine St. Philip's Mission and Vision statements.

Our first step at the November vestry meeting was to present a summary of the Boot Camp learnings and share what we identified as the priority for St. Philip's. The vestry was responsive to our priority, and at the December vestry meeting, decided to work in collaboration with the congregation to develop an updated Mission and Vision statement, that reflected our priorities.

Initially, we thought we could present the redefined Mission and Vision statements at our Annual meeting in January 2017. This timeframe, however, presented a challenge as the holidays were upon us, and we wanted the entire congregation to participate.

Post-Boot Camp Coaching

A critical component of the Boot Camp process is the individual coaching our rector received. Each Boot Camp rector is assigned a certified, professional coach to help with any issues that may arise during plan implementation. The six months of coaching, twice per month of hour-long sessions, were invaluable. The coaching inspired critical thinking and our rector learned to ask relevant questions that kept us focused and moved us towards progress. Questions included:

- What are you trying to achieve and what steps are being taken to achieve your goal?
- What resources are needed?

- Are you and the team equipped to get it done? If not, how can you receive the training needed?
- Who has responsibility of a given task?
- What is the next action to be taken (meet with the team, schedule a meeting etc.)?

Challenges and Process

We realized a big challenge would be to reach out again to the parishioners to get their input. The team agreed the congregation was already overwhelmed by questionnaires and surveys as we had recently conducted another congregational development program's surveys, as well as questionnaires on our rector Search. We thought it would be best to analyze the results of those surveys, and based on the core findings, we developed the following broad themes:

- Community Outreach
- Open & Inviting/welcoming
- Spiritual awakening

Based on the themes, we reached out to key persons to have guided conversations with a parish focus group. We were committed to working with the congregation to develop the Mission and Vision statements. Based on feedback from the ECF Post-Boot Camp webinars, and findings from the surveys and questionnaires, the team created outlines for the Mission and Vision of St. Philip's.

Next, we identified the members of the parish focus group from chairs/co-chairs of existing ministries, as well as persons not belonging to a "particular" group. The goal was to have a wide cross-section of the congregation based on age and gender.

Our rector, with guidance from his coach, sent an invitation letter to the persons selected to serve on the focus group to solicit their insights and thoughts to develop new Mission and Vision statements.

In early April 2017, the focus group reviewed the statements providing critical input and suggestions, and then our team added their input to the statements.

Our rector reiterated that the statements should represent the entire congregation, and that everyone should be made aware of this important endeavor. We prepared two draft versions of the statements for the wider congregation, and asked them to indicate the version they identified with. The team wanted to ensure the buy-in of the entire congregation prior to presenting the statements to the vestry.

The two versions of the statements were placed on a board with stickers for the congregation to choose. The preferred version was presented at the May 2017 vestry meeting. The team then held a final meeting to work on the rollout of the new statements on Pentecost Sunday 2017 (the birthday of St. Philip's Church).

The Rollout

We wanted the rollout to be a festive, memorable occasion, so it was listed in the Announcements in the church bulletin the week prior the rollout.

For the rollout, we planned and produced the following:

- A brightly colored page inserted in the bulletin, highlighting the Mission and Vision (with Frequently Asked Questions and Answers on its importance on the reverse side).

Questions included how the team came up with the Mission and Vision and how we plan to measure its success.

- Our rector announced the roll-out during the service, and then introduced Maya and Renée who read the questions and answers to the congregation (in a skit format). The entire congregation then read the Mission and Vision statements aloud.
- It was decided that the Mission would be included in the bulletin every Sunday going forward, and would be recited by the congregation prior to the sharing of the peace.
- We wanted to ensure there were constant reminders of the statements in the church, so we created two 3' x 6' vertical banners, and strategically placed them on both sides of the altar.
- Laminated bookmarks with the statements were designed and distributed, and two cakes decorated with the words, "St. Philip's Church Mission & Vision" were shared during the fellowship after mass in the undercroft.

Our rector search committee has incorporated the new statements into the parish profile package received by all candidates.

ECF's Boot Camp provided the tools, resources and expertise to learn how to lead our rector and congregation through the Mission and Vision statement process and the experience has been inspirational and rewarding.

Here is the final Mission and Vision statement:

The Mission of St. Philip's Church is:

To be a welcoming and vibrant international community of faith, focused on sharing the Gospel of Jesus Christ through joyful worship and love, commitment to spiritual growth, and active service in the community.

Our Vision:

- Continue to grow and be an inclusive congregation, meeting the spiritual needs of its members and the wider community.
- Be a church that both celebrates our history and faithfully lives into the future.
- Be a community partner with our local businesses and leaders.

Submitted by:

The St. Philip's Boot Camp Leadership Team

(The Rev. Patrick Williams, former interim Rector; Maya Latimer, lay leader; Renee Parris-Scott, Vestry member)

[St. Philip's Church](#), a historic Episcopal church located in East Harlem, was founded in 1809, and is the oldest black Episcopal parish in New York City.

The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century. This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopalfoundation.org.

Resources

- [A Vision for Your Vestry Retreat](#) by Linda Buskirk, February 2, 2015
- [Value One Another \(Vestry Retreat\)](#) by Linda Buskirk, February 9, 2015
- [Getting to the 'Why'](#) by Miguel Escobar, Vestry Papers, March 2013

- [Part I of Getting to the 'Why': Shared Purpose](#) an ECF webinar led by Miguel Escobar, June 4, 2013
- [Part II of Getting to the 'Why': Growing Leaders](#) an ECF webinar led by Miguel Escobar, June 6, 2013
- [Creating Strong Teams](#) an ECF webinar led by Ella Auchincloss, October 3, 2012
- [Cultivating a Culture of Discernment](#) by Blaire Pogue, Vestry Papers, July 2010
- [A Blueprint for Change](#) by Birdie Blake-Reid, Vestry Papers, March 2014
- [How to Select a Consultant](#), a tool is for congregational leaders who are considering hiring a consultant - or professional resource - to assist them in reaching their goals
- [Strategic Planning for Your Church](#), a tool to help congregational leaders do a comprehensive review of all activities, ministries and programs of your church

Five Pitfalls of Strategic Thinking

Susan Erdey

As your congregation tackles daily ministry in a rapidly changing neighborhood, challenging financial climate, or perhaps in a different language – the prospect of strategic planning may seem too daunting. Traditional strategic planning, with its focus on producing a detailed mission statement, setting ambitious goals, and its longer time horizon (often three to five years) can discourage you before you even get started.

That's why the Episcopal Church Foundation (ECF) encourages congregations to undertake a *strategic thinking* process rather than a traditional strategic planning or visioning process. Working through strategic thinking, a congregation articulates its core values, missional identity, and vision – that hopeful future picture of the congregation and community when it accomplishes its mission. Strategic thinking trains leaders to apply a strategy filter to identify and set only those goals that are aligned with the congregation's core values and vision, and make informed, real-time decisions that help bring that vision into being.

Although strategic thinking can be a user-friendly and encouraging process, it's not without its challenges. ECF's Strategic Solutions leadership recently reflected on several common pitfalls they've observed as they've worked with congregations.

1. Thinking you know the answer before you start.

"Congregations discussing their future are sometimes influenced by those who wistfully present the 'if only' list," Linda Buskirk, an ECF Consultant based in Fort Wayne, Indiana, says. "'If only we had a youth minister, then we could attract families.' 'If only we had a new organ, then more people would attend worship.' 'If only we had more money,' 'If only we had a gym,' etc."

But strategic thinking, Linda says, "calls us to set aside the 'if only' list in order to take a deep breath and think beyond the daily routine's worries and burning fires. It offers the opportunity to listen deeply as people of the congregation describe what they love to do with their gifts, and what they truly want to share with others. The result is a vision for the impact of the church's ministries, which in turn inspires participation and energy. All that can be missed *if only* the presumptive 'solution' is sought."

2. Thinking only the vestry needs to participate.

Donald Romanik, ECF's President and a member of the Strategic Solutions team, advises against keeping strategic thinking information too tightly held. "While the rector and vestry need to lead the process and be held accountable for its success," Donald says, "any visioning and planning initiative is doomed for failure without the participation and buy-in of the broader congregation."

"While you need to create an open and inclusive listening process, at some point it has to end and the leadership has to move forward with actual planning and implementation," Donald

cautions. “Often, there is a gadfly or a ‘bomb thrower’ who is going to try to sabotage or thwart the process every step along the way. While rectors have a critical role in helping to articulate observations, common themes, and experiences, they need to step back and become an active listener. There will be plenty of time for the rector to chime in and make it happen.”

3. Ignoring constituencies.

“Several years ago, I received a panicked call from a senior warden in a parish in the Northeast,” Erin Weber-Johnson, Senior Program Director for Strategic Resources and Client Services, recalls. “This small parish’s vestry internally engaged in a traditional visioning process which was limited to the vestry alone – without consulting the broader congregation or ministry heads of leadership. The visioning process ultimately led to the determination that a capital campaign was necessary to live into the vestry’s vision for the parish. They engaged an expensive architect and sub-contractor to redesign the parish’s small kitchen space. A plan was developed. The vestry was surprised when, after taking the plan to the congregation, they learned there was little support. In fact, the Episcopal Church Women (ECW) were very angry. One woman noted, ‘I was not asked my opinion and I spend all my time in this space. Doesn’t God speak to me too? Why is it that I’m only approached now when they need money?’

“This cautionary tale reminds us of why it is important to include everyone in a broad listening process,” Erin says. “In the Episcopal Church, we believe God still speaks today through the Holy Spirit and this Holy Spirit speaks to us individually and collectively as a faith community. Asking ‘What is God calling your faith community to do or be?’ requires a commitment to ensuring all voices are asked and heard. This requires developing an intentional plan for including all members through multiple listening opportunities.

Erin continues, “There’s an African proverb that says, ‘If you want to go fast, go alone. If you want to go further, go together.’ A visioning process can be life-giving for your faith community when all are included.”

4. Forgetting God in the vision.

The strategic thinking process can seem very practical and task-oriented, so it’s crucial to keep God in the forefront of the vision. Jeannette McDonald, an ECF Consultant based in New Hampshire, acknowledges that “often we are driven by our agenda. We are quite good at getting things done, crossing this and that off the to-do-list, but when it comes to listening and being still so we can hear God’s voice, it just doesn’t come easily.”

Jeanette notes, “The foundation of strategic thinking is listening to the wisdom of the whole community as it has been revealed through the love and wisdom of God.”

5. Approach-avoidance – because it’s never the “right time.”

“Congregations often don’t like to face their shortcomings,” notes Janet Lombardo, an ECF Consultant. “They think, ‘If we just keep doing what we are doing it will all work out.’ The question becomes ‘Why are you doing what you are doing and how long have you been doing it this way?’ This is where strategic thinking can be very helpful. God calls us to ministries and missions for a time. Few things are meant to last forever. If a congregation refuses to take a close look at what they are doing and why, they will lose their relevance with the community around them. Strategic thinking helps to refocus your energy on where God is calling you now. Today. When we work where God calls us to be, the work itself will be life-giving and our witness to our community will be strong. No more excuses!”

If you'd like to learn more about ECF's strategic thinking process, visit ECF's [website](#). You can also learn more by viewing ECF's "[Strategic Visioning and Planning for Congregations](#)" webinar.

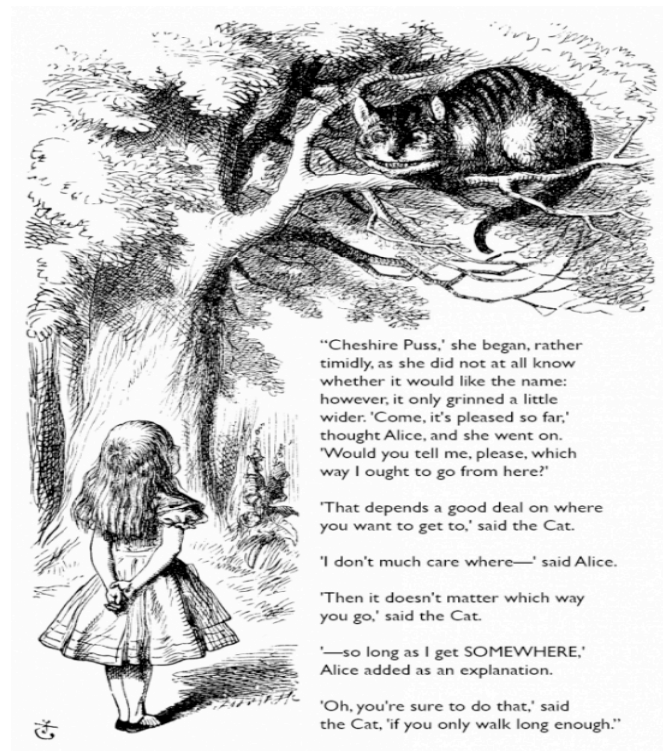
Susie Erdey is Program Director for Strategic Resources and Client Services at ECF. In this role, she supports the broader responsibilities of this program area, especially in the areas of relationship management, customer service, outreach and coordination with the other program teams. Susie is a non-profit management professional with over 20 years of service to Episcopal Church-related organizations, including dioceses, schools and seminaries, and parishes.

Resources

- [ECF First Step](#), an assessment tool for congregations seeking to grow in strategy, leadership, and finances
- [Getting to the 'Why'](#) by Miguel Escobar, Vestry Papers, March 2013
- [Part I of Getting to the 'Why': Shared Purpose](#) an ECF webinar led by Miguel Escobar, June 4, 2013
- [Part II of Getting to the 'Why': Growing Leaders](#) an ECF webinar led by Miguel Escobar, June 6, 2013
- [Cultivating a Culture of Discernment"](#) by Blaire Pogue, Vestry Papers, July 2010
- [Reweaving the Sacred: A Practical Guide to Change and Growth for Challenged Congregations](#) by Carol Gallagher (Church Publishing, 2008)
- [Transforming Congregations](#) by James Lemler (Church Publishing, 2008)

Financial Visioning in Seven Steps

James Jordan



Visioning is defined as “the development of a plan, goal, or vision for the future.” In this excerpt from Lewis Carroll’s *Alice in Wonderland*, Alice does not have any vision at all. Alice is going with the flow, doing things the way they have always been done, not rocking the boat, and biding her time on the vestry. By definition, a vision identifies a desired state, usually followed by a goal that is reached. Without a vision of where the congregation wants to be, how will it know when it arrives? If a person cannot imagine success in their mind, how do they ever expect to achieve it?

Visioning is hard, at least to carry the vision through to reality. It takes a leader to have a vision and inspire others to make it their own, too. Too often good visions are not realized for lack of taking the steps necessary to achieve the vision. The vision seems too ambitious, too far into the future, or requires too many resources. Such attitudes will assure the vision will not be

achieved.

What is required of the *process* of visioning is to break the vision down into manageable parts that define the vision, mission, goals, tasks, and activities necessary to execute on a daily basis to move toward the vision. Some might call this the difference between having a strategy and the process of strategic planning.

Congregations often see the future as, “how are we going to end the year with this year’s budget”, or only as far as the plan for next year’s budget. Often, there is no plan in the budget, or money set aside, for future events. Some of those events can be foreseen. For example, the carpet is looking worn, the hymnals or prayer books are losing pages, or the paint is peeling on the exterior of the building. Other events are big surprises, such as the air conditioning needing replacing after failing on Good Friday, or the sudden leak in the sanctuary’s roof. To keep the operations of the church going while planning for the future requires a different perspective on future financial matters than most vestries pursue. It is not about the annual fiscal budget solely. There must be a plan for a number of events, some near-term and some in future years.

Financial Strategic Planning

Step1: Gather data

An assessment must be made of the state of the congregation. What are the demographics of the members and visitors? How has that changed in the last ten years? What is the prognosis for what the demographics will be in the next ten years? And, what does that mean for the future income potential? Using the Episcopal Church’s [“Studying Your Congregation and Community”](#) website, select “view community profile.” Most congregations do not know about this wonderful service that will give both historical and future demographic information about the congregation’s market circle, including households, income, age, ethnicity, and more.

Step 2: Analyze data

An assessment must be made regarding the donors. If the congregation is running [ACS Technologies software](#), a ten-year analysis of individual and total giving can be readily produced. The objective is to learn about the giving trends. What are the congregation's experiences of giving from their donors (amounts and purposes)? Pledge donations are generally for operating purposes, while designated gifts are, too, but for specific purposes. Attention needs to be paid not only to the trend (increasing or decreasing) but also to the ratio of designated giving to total giving. If that ratio is on the rise, I get concerned about the commitment of the members to the congregation's general direction pastorally. A shift away from pledges towards other giving might indicate a problem. This could mean the members do not feel a part of the Body of Christ, but are becoming siloed in their own personal interests or disillusioned with the general vision and mission of the congregation.

Step 3: Take stock of the current status

An assessment of the physical facility must be made. It would be wonderful if there were a fixed asset schedule that listed when the carpet was installed, when the roof was put on, or when the air conditioning system was installed. In addition, a fixed asset schedule would list the estimated useful life, acquisition cost at the time, and estimated remaining useful life. Having one gives future vestries insight regarding when things might need replacing and the ability to proactively plan for them. But the vast majority of parishes do not maintain one. However, the need for understanding this information in order to properly identify future financial requirements beyond operating expenses is very important. An effort must be made to ascertain when some of these components were installed, when they might need replacing, and what the replacement cost would be today. A spreadsheet is helpful to forecast the replacement year, and the estimated future cost.

Step 4: Develop a plan

Develop two budgets – one for operating and one for capital needs. Most congregations are not prepared for an emergency like an air conditioner malfunction. Many are fiscally hurt by such a large, sudden expenditure. The operating budget needs to consider the income and expense expectations for the operation of the church for the year. The capital budget needs to establish projected replacement items, time frames, and costs. While the planning horizon for the operating budget is a year or two, the capital budget planning horizon needs to be sufficient to encompass major components, such as painting, carpeting, roof, plumbing, electrical, air conditioning/heating systems (HVAC), parking lot resurfacing, refurbishing the organ, etc. A twenty-year horizon is the minimum to use for capital budgeting planning.

A year-by-year schedule needs to be developed with the expected capital expenditures per year. This gives a cash requirement by year for future years from which to plan the reserves that need to be set aside and accumulated each year in preparation for the capital event.

Fold the capital cash requirements back into the annual fiscal budget to begin to accumulate the planned repair or replacement of items. This blending of the capital budget with the annual operating budget will yield a new required cash income to support both the capital and the operating budgets for the year. Often, this is an eye-opening experience and generates a lot of capital campaigns to establish or catch up with the cash reserve needs that likely have not been set aside to date.

Step 5: Assess the feasibility of the plan

Refer to the previously mentioned donor analysis and determine if the trend will support the new budget. Often, it appears as though the capital budget cannot be supported by the current giving levels. But it has to. Failure to provide for future large expenditures for the sake of

current gratification of programs or salaries is fiscally not sound, detrimental to future vestries, and risks the future financial stability of the congregation.

Step 6: The Make vs. Buy decision

Do we have the expertise, broad consensus, institutional drive, and manpower to execute the plan in the congregation? I suggest the congregation considers hiring a company that specializes in developing and running stewardship and capital campaigns. They are likely going to conduct a feasibility study initially to determine the appetite of the donors which usually means interviewing specific donors. A reputable company will not recommend a capital campaign that does not have a likelihood of success. They have a reputation to maintain and only want successful campaigns, as you do. They will suggest timing, amounts, messaging, dates, events, and other integral parts of a successful campaign based on their experiences with success. If not hired, the congregation will need to conduct these activities regardless in order to be more successful.

Step 7: Execute the plan

Good planning can go awry in the execution of the plan for a myriad of reasons. Lack of appropriate, clear, and consistent messaging is one of the main reasons for failure. Follow-through, monitoring, and honest in-progress assessments and adjustments can either add to successful execution, or failure to do those things will detract from the successful execution. With good planning and execution, the congregation stands a better chance of achieving the vision.

In summary, having a future vision is a good thing. It entails a strategy that shows hope for the future. Realizing that vision is quite another thing. It takes strategic planning to bring it to fruition. Whether it is this example of budgeting or some other long-range vision, the fruits are

in the process of strategic planning and execution thereof that make the difference between a dream and reality.

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Mr. Jordan is a Certified Public Accountant and Certified Fraud Examiner. His consulting and auditing practice is dedicated to serving only churches and their higher denominational organizations. He is the author of [Financial Management for Episcopal Parishes](#), Revised Edition, 2017, Church Publishing, Inc., New York. He earned his Executive Masters of Business Administration from Emory University's Goizueta Business School, with international business emphasis from London Business School. His speaking engagements span the globe to six continents and dozens of countries. He has conducted live webinars and on-line learning courses for Masters of Divinity credit. Mr. Jordan is an adjunct professor at Emory University's Candler School of Theology, Atlanta, Church Divinity School of the Pacific, Berkeley, CA, and General Theological Seminary, New York City. He and his wife, Eileen, are members of St. Paul's Episcopal Church in Newnan, Georgia. Mr. Jordan is a member of the American Institute of Certified Public Accountants (AICPA), the AICPA Not-for-Profit Section, and the Association of Certified Fraud Examiners (ACFE).

The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century. This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopalfoundation.org.

Resources

- [Financial Management for Episcopal Parishes](#) by James Jordan (Church Publishing, Revised Edition 2017)
- [Year Round Stewardship: Talking About Money](#) an ECF webinar led by Chris Harris, February 11, 2014
- [Good Stewardship Addresses Hopes and Fears](#) by Kate Ferris, Vestry Papers, May 2007
- [Create a sound parish budget](#) by Craig Bossi, Vestry Papers, July 2009

Investing in a Multiracial Vision of Church

Kenji Kuramitsu

I recently attended a weekend-long antiracism training alongside other laypeople and clergy from the Diocese of Chicago. Participants were presented an informational sliding scale and asked to “rank” our organizations in terms of our commitments to mobilizing against white supremacy. This was a challenging, thoughtful exercise which encouraged us to engage necessary, pointed questions. As a diocese, are we shoring up white exclusion and power, have we moved towards a decorative and superficial multiculturalism, or do we evince active organizing against institutionalized racism in every facet of our shared life?

My church’s parish office has a lovely monthly calendar of Episcopal-influenced comics. One of my favorites, “A Parable of Episcopal Evangelism,” depicts a tidy fish tank lying in the sand next to a rolling sea. The caption reads: “It is likened unto an aquarium set by the ocean’s edge. Any fish from the ocean are invited to jump into the aquarium if they happen to be passing by and feel like it.” This is certainly how our historic commitments to diversity and multiculturalism have operated in our churches: Come In, We Don’t Care Either Way. Many disenfranchised people have been hesitant to become a part of our denominational structures because of their often exclusive character. In many ways, our whiteness has impugned our public witness, and this has largely not been met with serious challenge.

An authentic welcoming

It is often said that a potential member’s first official visit to our congregation will be their exploration of our website. Many churches consequently boast incredible graphic design and manage to brilliantly capture the relational beauty of our community life. In an effort to

demonstrate welcome, congregations are frequently sure to plaster colorful faces across their marketing materials. Yet these surface appearances can be deceptive. What other tools may be helpful in analyzing whether we are truly celebrating ethnic difference?

I believe that one of the institutional thermometers that can help us determine how serious we are about our welcome to gender and sexual minorities and communities of color is the state of our finances. That is, our fiscal decisions often speak far louder than lofty words. A budget is an inherently confessional and theological document, revealing our innermost spiritual values; an outside observer should be able to analyze our finances and weigh how much we truly care about this Jesus Movement that we have spilled so much ink over. This raises many practical and uneasy questions. What kinds of radical hospitality are we apportioning or neglecting in our congregations? Are we properly allocating funds, on personal and institutional levels, that reflect our supposed commitments towards serving hurting people?

Last week, my seminary classmates and I visited Trinity United Church of Christ, a congregation which, as part of their belief in the goodness of God's creation and the healthy stewardship of the natural world, has tangibly "greened" their church in several powerful ways. The parish hosts a weekly farmers' market of produce grown by black planters, fosters several community gardens, and built an energy-efficient green roof which puts their building to work growing vegetables for the hungry. Many questions were raised for me after my visit: does my church building show a caring, familial relationship with the land, or does its operation mirror cheap, exploitative values? If the God of our faith stands against reckless environmental degradation, why do we consistently budget for so many disposable paper products?

Proactive diversity

While my seminary's student body is predominantly non-Latinx, many of our churches in and around Chicago's South Side come into regular and intimate contact with Spanish-speaking communities. Recognizing the hypocrisy of claiming to celebrate cross-cultural values while not being able to exchange words with our neighbors, our school has begun to offer free Spanish language instruction classes. Setting aside the funds to more responsibly interact with our natural environment, and to teach a neighbor's tongue, will seed countless new healing ministry possibilities.

Yet we do not need to wait for diocesan or seminary partners to implement these changes. In many ways, our congregations can lead the way in this work. Particularly with the resurgent forces of white supremacy fomenting around us, has your vestry considered hosting an antiracism training or basic social justice competency education? If the neighborhood is shifting around your congregation, are you offering English language classes for community members – or foreign language instruction for congregants to better engage others? How is your church garden helping to feed local ethnic community centers, houses of faith, or activist groups? Where we decide to invest, there lie our truest beliefs. In fiscally lifting up multilingual and multiracial church leadership, we go beyond lip service to multiculturalism and diversity, and will come to harvest more fully the richness of our shared ministry.

In the United States, both the way we look and the way we worship continue to shift in seismic ways. It seems clear that the institutional church in the West is groaning, hemorrhaging membership and creaking under shifting demographic weights. Less clear is whether these terrible noises are death rattles or the hazard gasps of birth pangs. What if we are not dying, but on the cusp of something new? What if, in fact, the White Mainline Church as it has historically existed needs to die in order for the church of God to be born? Good stewardship does not mean merely tilling the soil before us, but honoring the atmospheric changes that the future will bring, centering trust and humility. We can adhere to austere financial decisions that reify current members' comfort, and harken for a 1950's mom-and-pop church "golden days" that never were. Or we can turn a critical eye to our capital and whom it serves, and lean into the Jesus-shaped movement that God is calling us to today.

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His newly-released prayer book, "A Booklet of Uncommon Prayer" published by Evangelicals for Social Action, is available for purchase [here](#).

Resources

- [Our Call to Leadership](#), by Lelanda Lee, Vestry Papers, May 2012
- [Lift Every Voice](#) by Anna Olson, Vestry Papers, January 2015
- [Putting Out Signals](#) by Anna Olson, Vestry Papers, November 2014
- [Understanding and Celebrating Differences](#) by William M. Kondrath, Vestry Papers, January 2011
- [Walking the Road of Relationship](#) by Sarabeth Goodwin, Vestry Papers, November 2015

St. John's Plays Music in the Key of P

Miguel Escobar

St. John's is a small, good-hearted, and busy Episcopal congregation in the suburbs of San Antonio, TX. Over the past couple of years, they have discerned that God is calling their congregation to become more engaged with the community beyond their red doors. A couple of things have happened since: this past January's vestry retreat was focused on Matthew 25;

they've decided to take up a special collection every fourth week as a donation to their local food pantry; a few parishioners have decided to tutor students at the local high school. Throughout it all, the vestry members have been continuing to hope and pray that God will help their congregation live more deeply into their new vision for serving the wider community.

One day, a parishioner named Brenda reads in the paper that the test scores for the local elementary school have been in decline for the past ten years. She learns that the school has been largely unprepared for the recent influx of Spanish-speaking immigrants and their children, and that the school has been struggling to serve this community ever since. After a phone call with the principal, she spends the next week dreaming of different ways that St. John's can help support the local school system as they adapt to changing demographics. She wonders if her parishioners would help her buy bilingual children's books for the school library. Maybe there are parishioners who can teach English as a Second Language (ESL). Maybe she and a few others can go and meet some of the parents to learn more about what their needs are. As this hopeful dream grows stronger, Brenda realizes that helping to support the local schools could be a whole new direction for St. John's, if only the congregational leadership team can see the potential in her mustard seed of an idea.

A Familiar Decision Point

For the record, St. John's is not an actual congregation. And yet, isn't it? Anyone who has been involved in congregational life knows and has likely lived through such a moment, one in which a congregant brings a mustard seed of an idea before the vestry for its consideration. Although this may be different than your own experience, what I have oftentimes seen is vestries either embrace the idea whole hog (as my dad would say), or reject it completely out-of-hand out of fear of change. And having seen this from time to time, what I've often wished for is some method for a vestry to critically evaluate, and even strengthen, the ideas that they receive.

The rest of this article is essentially an attempt to offer that method. It's adapted from the concept of a strategy filter which I first encountered in David La Piana's book *The Nonprofit Strategy Revolution*. The Episcopal Church Foundation (ECF) has used this method for our own strategic planning purposes and, more importantly, has modified it and added to it over time as a result of our work with many congregations.

A Conversational Guide

The tool below – which I'm calling "MUSIC in the key of P" is a conversational guide for a leadership team to discuss the strengths and weaknesses of an idea they are considering pursuing. The tool asks them to consider how/whether a proposed idea is aligned with the congregation's mission and vision, whether this idea enhances the congregation's uniqueness, and is financially sustainable. They also evaluate whether the idea is in keeping with the congregation's identity, whether the community has the capacity to implement the idea well, and if there are any elements that can be done in partnership with other groups.

Having said this, I really want to emphasize that great ideas don't necessarily fulfill all six factors perfectly.

As you know, there are many worthwhile initiatives that aren't going to be immediately financially sustainable. There are also new efforts that don't fit a congregation's current identity but will help to expand it in new and exciting ways. My hope for the vestries and mission committees who use this guide is simply this: that using this tool would help to strengthen some of the weaker points of the ideas brought to them, and that congregations say 'yes' to new ideas with a clear-eyed understanding of what those initiatives' strengths and weaknesses are.

With that in mind, let's return to St. John's and consider how they might play MUSIC in the key of P in considering Brenda's dream.

M- Mission and Vision: The first question that needs to be considered is whether the direction Brenda's dream will lead them in is in keeping with their understanding of what God is calling them to do (mission) and their hopeful image of their church and community (vision). On this point, most vestry members agree that finding ways for St. John's to help strengthen their local public schools is very much in line with their sense of what God has called St. John's to do today.

U- Uniqueness: It's also important to ask whether pursuing Brenda's idea will serve to enhance the unique role that St. John's plays in the community. After a little research, the vestry realizes that the Presbyterians up the road have a robust and well-attended after-school tutoring program for the local high school, so pursuing this idea won't necessarily enhance the unique role of St. John's in the community. And yet, might it still be worth pursuing?

S- Sustainability: For St. John's, and likely most congregations, the answer to whether this new initiative is financially sustainable is "It depends." At this moment, they don't have a lot of fat in the annual budget so in pursuing this idea they will need to start with very small initiatives. Perhaps they can plan a small book drive. Perhaps a few parishioners can commit to attending PTA meetings. Nevertheless, they also wonder whether congregants would be inspired to give more to their upcoming fall fundraising campaign if they knew this was a direction St. John's was pursuing.

I- Identity: Part of the identity of St. John's has been to be a warm-hearted and joyful place, but how it has stayed this way is by also being somewhat disengaged. So far, congregants have expressed warm enthusiasm when the vestry has shared what they believe God is calling their congregation to do, and a few have expressed genuine appreciation for the efforts made thus far to live this mission out. Nevertheless, the vestry is also certain that an explicit focus on helping to improve public schools will push some members considerably. The rector dreads that in the not-so-distant future she will have to have conversations with particular members about

why the church is buying bilingual children's books. This may challenge the congregation to grow in its identity in some exciting but also uncomfortable ways.

C- Capacity: While St. John's is a busy place, the vestry believes the congregation has the capacity to carry out a few small initiatives over the next couple of months. It will be critical, though, that these small initiatives generate interest and energy among some of the core volunteers, and even draws additional people who have special interest in this kind of work. Dreaming bigger, the vestry wonders whether they should pursue a special gift from some of the wealthier members to see if they might increase the parish administrator's hours and have those hours dedicated to this new effort.

Once a vestry has considered these five factors, they should have a fairly strong sense of what they are capable of doing on their own. But none of us are working alone and in every case I believe that God calls us to much more. This is where the **P – which stands for partnerships** – comes in.

If St. John's vestry were to consider how they might pursue Brenda's dream in partnership with others, they would realize that the Presbyterians down the road with the robust after-school tutoring program are not competitors but likely allies. They may learn that the majority of Latino immigrants are going to St. Peter's Roman Catholic Church, a church that has just hired its first Spanish-speaking priest. Maybe he will help St. John's learn more about the lives of the recently arrived immigrants. They might also discover that there is a county-wide initiative to improve public education, and that there's a candidate running for town council whose main platform is focused on improving education. In pursuing partnerships, St. John's would gain allies and would make a much larger impact than by working alone.

The truth is, it takes many years for the mustard seed of an idea to take root, push above the soil, and grow into a congregation's wild vision. Even so, my hope for St. John's is that they would take Brenda (and God) up on her invitation, and that after careful consideration, St. John's would say 'yes', albeit with eyes wide open to the challenges and possibilities that lie just ahead.

Miguel Angel Escobar is Director of Anglican Studies at [EDS @ Union](#) in New York, NY. He is the former Managing Program Director for Leadership Resources and Communications at the Episcopal Church Foundation (ECF), having overseen ECF's Vital Practices, the Vestry Resource Guide, the Fellowship Partners Program, Vital Teams Program, Spanish-language resources, and organizational impact studies. Prior to working for ECF, Miguel worked as communications assistant to the Most Rev. Katharine Jefferts Schori, Presiding Bishop of the Episcopal Church, from 2007-2010. He currently serves on the board of Forward Movement, the church engagement advisory board for Episcopal Relief and Development, on the advisory board of Duke Divinity's Faith and Leadership program, and as a reader for finalist applicants to the Echoing Green Social Entrepreneurship Fellows program since 2015. Miguel graduated from Union Theological Seminary with his Master of Divinity in 2007.

Resources

- [The Difference Between Mission and Vision](#) by Linda Buskirk, ECF Vital Practices Blog, January 13, 2012
- [Strategic Thinking for Congregations](#) an ECF webinar led by Donald Romanik, April 23, 2015
- [Key Elements of Identity for your Vestry Retreat](#) by Linda Buskirk, ECF Vital Practices Blog, January 18, 2016
- [Taking Time by Jeremiah Sierra](#), ECF Vital Practices Blog, June 24, 2013
- [Time Stewardship at a New Level](#) by Steve Huffman, Vestry Papers, June 2001

Making Episcopal Identity Strategic

Daniel Heischman

A colleague of mine in the school world tells me about an exercise she likes to do with a group of admissions people from a wide variety of schools as they gather together. She asks each member of the group to make a list of the things they believe make their schools truly special – hardly a difficult task for those whose job is to communicate the particular uniqueness of their schools.

Once each person has assembled a list, she has people call out, at random, one distinguishing feature of their particular school that appears on that list. When someone in the assembled group has mentioned a characteristic that is on anyone else's list, that characteristic must be crossed out. After several rounds of this, many of the most common attributes – diverse, welcoming, close faculty-student relationships, commitment to excellence – have been crossed out on virtually everyone's list.

The characteristics that remain – after rounds of hearing all of the things these schools claim as distinguishing but are also identified by other schools – are at the heart, she maintains, of what makes each school unique. What is left of the list, after the most common and generic characteristics of a school have been shared, tells the real story of our school's identity.

What is Episcopal identity?

When, in the context of school or church, we talk about Episcopal identity, we will often describe that identity in ways that other schools or churches, beyond the Episcopal orbit, could

very well use to describe themselves. To be Episcopal surely means to be diverse and inclusive, to be welcoming, to being committed to serving the community. Lots of peer institutions would likely see themselves mirrored in these attributes, and, to be sure, form the core of their reasons for being. But those alone will not distinguish us. We need to take a look at the attributes that remain on our lists well after the others have been called out. Those remaining may well be the key to our uniqueness, our true Episcopal identity.

Sometimes we do strategic planning in order to keep up with the competition, and our plan may well turn out to look and sound like a great many other plans. At other times we undertake strategic planning in order to express our hope to be something that we are clearly not at the moment, thus risking the possibility that the institution described in the plan has little in common with the one we know and love. Alternatively, we can build upon our true forms of uniqueness, beyond the generic attributes. That is the best option, I would maintain, for forging a connection through this planning process between who we are and what we want to be in the future.

Episcopal identity not only happens to be one the key distinguishing traits of our schools, but a valued ingredient in building a vision of the future. I would like to share with you four ways that this identity gives shape to the strategic plans that many of our schools develop.

1. Episcopal identity is the basis for launching such a plan in the first place. In its recently completed (2016) strategic plan, St. Margaret's Episcopal School in San Juan Capistrano, CA grounds all of its strategic goals in its identity as an Episcopal school. Above all, it proudly states that the school community is called to "strive for justice and peace among all people, and to respect the dignity of every human being" (from our Baptismal Covenant). Like so many other Episcopal schools, St. Margaret's prides itself on being a diverse community, and its Episcopal identity calls it to "integrate religion and spiritual formation into the curriculum and the life of the school community." Before any visions for the future are shared, this grounding is delineated and forms the basis for what lies ahead.

2. Strengthening Episcopal identity as a specific strategic goal. Episcopal Academy, in Newtown Square, PA, identified Episcopal identity as the number one strategic goal for its plan, unveiled in 2010. In the preface to this strategic goal, the school explained, "We are The Episcopal Academy, and we enthusiastically embrace and honor all that means." Basic to their view of Episcopal identity was a respect of all faiths, a "religious openness," as the plan articulates. At the same time, "we practice our religious traditions every day, and we welcome and expect participation by all." It reaffirmed that all members of the community will attend chapel and students will engage with the religion curriculum. The four specific initiatives listed under this goal were:

- To represent our religious foundations in our written communication;
- To commit to chapel services that are based in the Book of Common Prayer and that are respectful of our pluralistic community
- To review and potentially expand course offerings in religion;

- To include character education at every level of the curriculum.

As the plan explained, “At the Episcopal Academy, we value deeply our traditions without getting stuck in them.”

3. Communicating Episcopal identity. There is no greater need among our Episcopal schools than to find language that can capture the unique value that an Episcopal education brings. St. Stephen and St. Agnes School, in Alexandria,, VA, identified in its 2016 plan this need as a major strategic goal. Its Episcopal foundation and commitment to goodness as well as knowledge, provide the core of its identity; they “guide us as we celebrate and share our message.” Under this goal, the school identified three specific initiatives:

- Translate this identity into a clear marketing plan;
- Highlight and leverage our Episcopal identity as an integral part of who we are and what we do;
- Translate its tag line, “knowledge as well as goodness,” into an effective message that conveyed their core values and sense of wellness for students.

In its marketing as well as communications, the school saw Episcopal identity as an asset, not a liability.

4. Episcopal identity as a standard of excellence. In its 2012 strategic plan, the Episcopal School of Dallas, TX devoted a strategic goal to its Episcopal identity, emphasizing that the school’s “continued excellence as a premier independent school is rooted in the tradition of worship, servant leadership, inclusion, and religious formation” (those being the school’s four pillars of Episcopal identity). Included under this goal were initiatives for the development of clear talking points for the articulation of Episcopal identity; increased training for student leaders of the Vestry, Community Service, and Student Government; and the formation of a Religious Life Learning Team.

These four pillars, “woven together are the core principles that distinguish Episcopal schools from other faith-based schools.” They form the basis not only for the school’s uniqueness, but also form the standard of excellence by which the school judges itself.

As with many Episcopal schools, these four institutions see Episcopal identity as a precious asset, worth preserving, developing, clarifying, and proudly communicating both internally and externally. Beyond what every school (or church, for that matter) may say about itself, this foundation may well serve as its unique niche, and also serve as one of the key guideposts and strategies for looking toward the future.

The Rev. Daniel R. Heischman, D.D., executive director of the [National Association of Episcopal Schools](http://www.naes.org) (NAES), began his tenure on July 1, 2007. Prior to his work with NAES, Mr. Heischman was College Chaplain at Trinity College, Hartford, Connecticut for four years. He was head of the upper school and assistant headmaster of St. Albans School, Washington, DC from 1994 through

2003. From 1987 to 1994 he was executive director of the Council for Religion in Independent Schools (CRIS), now the Center for Spiritual and Ethical Education (CSEE). He served as chaplain and then assistant headmaster of Trinity School, New York, New York from 1979 until 1987. He began his ordained ministry in 1976 at St. Paul's Episcopal Church, Englewood, New Jersey.

Resources

- [On "Going Episcopal"](#) by Rachel Held Evans, Rachel Held Evans Blog, March 25, 2015
- [From Scratch: Explaining Episcopal](#) by Anna Olson, ECF Vital Practices Blog, March 23, 2016
- [Ongoing Discernment: The Way of Jesus](#) by Blaire Pogue, Vestry Papers, January 2014
- [Sharing Our Church Through Stories](#) by Barbara Dundon, Vestry Papers, November 2010
- [Newcomer Profiles](#) by Ken Garner, Vestry Papers, November 2014

Visioning and planning at ECF's first Spanish Bootcamp

Sandra T. Montes

This article is also available in Spanish [here](#). Este artículo está disponible en español [aquí](#).

On August 19, 2017, the Episcopal Church Foundation (ECF) organized the first Financial Literacy Bootcamp in Spanish. There were people from four dioceses and nine churches in attendance at St. Mary Magdalene, Wheaton, MD in the Diocese of Washington. The full-day event was the culmination of months of preparation, inquiries, and finding just the right people for this event.

As Spanish language resource consultant at ECF, I had the opportunity to speak with many clergy and lay people about what their needs were on the topic of financial literacy. The vast majority said they needed "the basics" of both personal and parochial finances, and stewardship. We incorporated some of the curriculum components that ECF had already developed and invited two Latina experts in financial literacy to help us turn this dream into reality.

At the event, after Bible study, each church team introduced themselves and their church, and a brief discussion on the difference between stewardship and fundraising, the first module on Vision and Planning was presented by our President, Donald Romanik. This was followed by

modules on finances, both personal and parochial, and team building. I noticed the participants were taking notes, asking questions and appeared to be very engaged.



After the bootcamp, I followed up with the different church representatives and there was one common thread in what I heard: “el Bootcamp” (as we at ECF called it) had renewed and focused their planning. In other words, their visioning process had begun. All the churches represented were in different stages of planning, visioning, and implementing what they had learned. As a teacher, it was inspirational to hear that our own planning and vision was paying off.

Reflecting on the past bootcamp, several participants said that if they can maintain a clear and transparent vision, they will be focused on healthy personal financial habits, and their church administration will probably fall into place. There were a couple of participating teams who said they had not begun to use the tools we gave them, but as we spoke they realized they had been using them while visioning and planning for their stewardship campaigns. All the groups said they had gone back to their vestries to share what they learned and to see where they could go from there.



A story that I have heard in several congregations (not only in the ones who participated in this bootcamp) is that there are some groups within a congregation who have raised money and have decided to either keep it in their own homes or in separate bank accounts other than the general church fund. One of the priests told me that because of the bootcamp training module on Mission and Vision, they have realized the need to put the “separate” money into the general account because it helps to fund the church’s one mission and vision.

Part of the definition of vision given in the module encouraged participants to think big, light their passion, and live and challenge their dream. Rev. Fred Clarkson, from the Diocese of East Carolina said that one thing he took back to his diocese was “the importance of stewardship development if we are to model faithful communities.” Having a clear vision of what a faithful community can be, is lighting their passion which will help them live and challenge their dream.

Although the day was jam-packed, we ended it with some time for teams to plan. Since most teams had never done anything like this before, we encouraged them to look at their mission and envision where this could take them. Edith from San Mateo, MD shared that this process was most helpful to them as a team. When they went back to their church, their group spoke not only to the vestry but also to their congregation. They have been working towards parish status (self-sustainable) and part of that process is to start paying their vicar’s salary. Although they are scared she said that this training came at the right time because it helped them focus their efforts towards a sustainable future. They knew what they were working towards, but had not planned what that would actually look like. San Marcos, Diocese of Virginia, has an interim

pastor and although they were very excited and energized, they also wondered how they could plan for an unsure future. The participants from the congregation took the information and worked on creating not only a mission statement, but also offered up a renewed vision for their church. One of the participants said that creating their visioning board (part of their homework) gave them a visual of what they hoped for in their church, and planning as a team helped them remember that they will be able to work with their future rector.

ECF is planning a day and a half long Spanish Bootcamp in 2018 and we are hopeful that it will be as fruitful as our pilot.

***Sandra Montes** was born in Perú, grew up in Guatemala and settled in Texas as soon as she could. Her passions are God, family (especially her son), music, education, and writing and she has been hoping and praying for this position for years. Sandra has been developing original bilingual resources for her church, school, and others for years. Sandra has been volunteering and working in the Episcopal Church since she was welcomed in 1986. She serves as musician, translator, speaker, consultant, and writer. She earned her doctorate in education in 2016 and is a full-time freelance consultant and musician.*

The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century. This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopal.foundation.org.

Resources

- [Team Leadership](#) an ECF webinar led by Rosa Lindahl, March 26, 2015
- [Vital Teams: Team Leadership Essentials](#) an ECF webinar led by Ron Byrd, December 10, 2015
- [Teams Built on Trust](#) by Rosa Lindahl, Vestry Papers, March 2014
- [Why Vital Teams?](#) by Miguel Escobar, Vestry Papers, March 2014