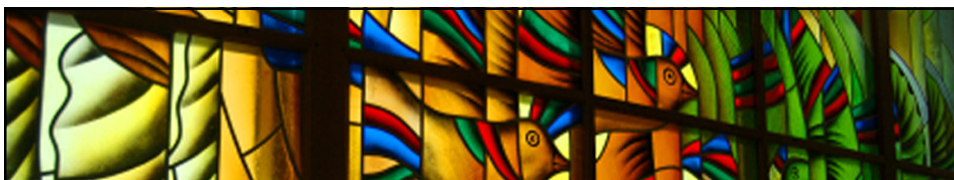


Before we begin...

- Which of the following three topics is most pressing for you right now?
- Does your congregation do an every member canvass?
- Did you read Greg Syler's blog post "Jesus is the reason for this season too"?



Vestries: The Next Six Months

Miguel Escobar and Brendon Hunter
Leadership Resources, ECF
October 7, 2014



Episcopal Church Foundation (ECF)



The Episcopal Church Foundation (ECF) provides comprehensive and innovative programs, products and services in the areas of leadership and financial resource development. ECF programs and services include Vital Teams, ECF Vital Practices, and the Fellowship Partners Program, capital campaigns, planned giving, endowments, and strategic solutions.



Presenters



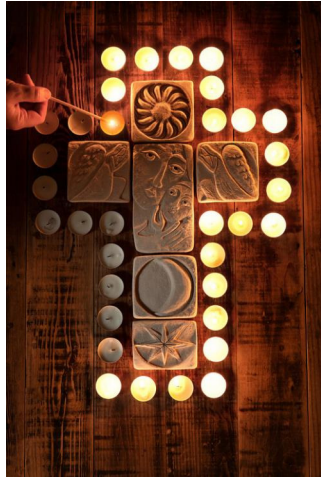
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A prayer in busy days...



O God of peace, who has taught us that in returning and rest we will be saved, in quietness and confidence will be our strength: By the might of your Spirit lift us, we pray, to your presence, where we may be still and know that you are God; through Jesus Christ our Lord. Amen.

- Prayer for Quiet Confidence
Book of Common Prayer



Overview of Vestries: The Next Six Months

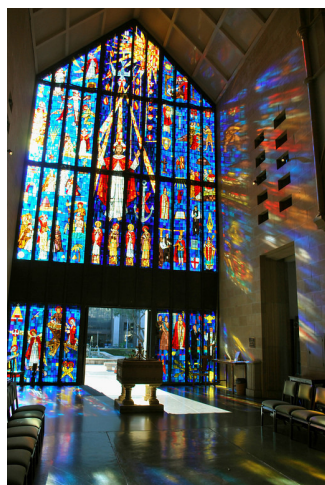
- i. Is Jesus the reason for the season?
- ii. Jumpstarting your annual stewardship campaign
- iii. Nominating and electing new vestry members
- iv. Questions/discussion
- v. Annual meetings
- vi. Vestry orientation and vestry retreats
- vii. Discussion on next steps
- viii. ECF resources, upcoming webinars, feedback



Please download the accompanying resource sheet. We will be referring to this throughout presentation.



Is Jesus the reason for the season?



“As you look at and think about all that your church offers during this busy season, is Jesus visible and present? How do you know? What tools do we have at our disposal to help us with this discernment?”

- Greg Syler, “Jesus is the Reason for this Season, Too”



Jumpstarting your annual stewardship campaign

From ECF webinar “Lackluster Stewardship”

- Source of more than 2/3 parish income
- 100% pledging? Focuses on increasing pledging of “committed”
- Pitches: From obligation to impact + vision
- Method: From single letter to one-on-ones (or the every member canvass)
- The United Way principle: Saying “thank you” in seven different ways



Chat Box Question

What are some great themes for an effective stewardship campaign?



Best resources for jumpstarting your annual stewardship campaign

Vestry Paper articles:

- Laurel Johnston, "Model Intentional Giving"
- David Posterero, "Lessons from an annual giving campaign"

ECF webinar recordings

- Addressing Lackluster Stewardship Campaigns
- Year Round Stewardship: Talking About Money

Tools and Resources

- Laurel Johnson, Annual Giving Campaign Tools
- Beau Surratt, All Saints' Mad-lib Pledge Card



Nominating and electing new vestry members



From Vestry Papers article "Build a Healthy Vestry"

- Focuses on the nomination, rather than election, process
- Hinges on two one-hour vestry discernment sessions held in months prior to annual meeting
 - Emphasizes importance of one-on-ones, in addition to general publicity
 - Qualities to look for
- Sessions are focused on candidates discerning "Is this a ministry God wants me to do?"
- Emmanuel Episcopal nominates same number as there are positions available, but leaves door open for floor nominations



Nominating and electing new vestry members

"While all human processes have their frailties, over the years we have had healthy, strong vestries. People are mostly on the same page, expecting and experiencing vestry not as a business meeting, but as a faith-girded leadership group. Language is so powerful. Two of the most helpful uses of words in all this: 1) Ministry—People are called to this ministry. Vestry ministry is Christ-centered. 2) Household of faith—Confront gently but surely then get rid of the phrase that "church is a business..." It is not. We are a household of faith, and every household needs to tend to its "house" and its finances, and at the heart of the household are the relationships to God and each other."

- Janie Kirt Morris, Build a Healthy Vestry



Chat Box Question

What are qualities to look for in potential vestry candidates?



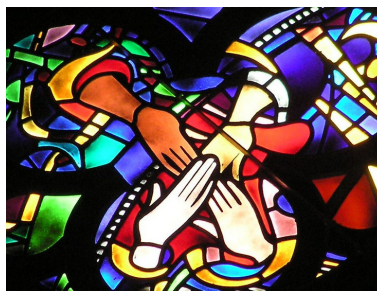
Best resources for nominating and electing new vestry members

Vestry Paper articles and tools

- Janie Kirt Morris, “Build a Healthy Vestry.”
- Janie Kirt Morris, “Vestry Discernment Process”

ECF Webinars

- Ella Auchincloss, “Identifying & Recruiting New Leaders”



Questions/Discussion

- Clarification questions
- Your stories and experiences on annual stewardship campaigns, nomination and election processes



Annual meetings

Check with diocesan canons and parish bylaws

Typical agenda items:

- Rector's annual report/message
- Approval of minutes from past year's annual meeting
- Annual financial report (previous year's finances)
- Update from registry – households, baptisms, weddings...
- Election to fill vestry vacancies and name senior warden
- Election of deputies to diocesan convention
- Reports from various groups within the congregation

May include:

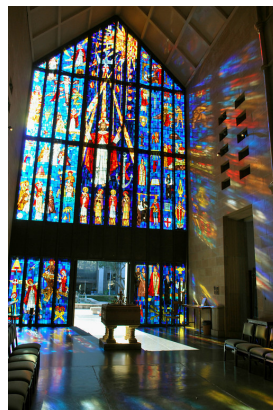
- Election of Junior Warden
- Informational presentation on next year's budget



Annual meetings

Is the annual meeting an opportunity...

- To incorporate prayer/singing into the meeting
- For the rector to share the mission/vision of the congregation, especially for the next year
- For vestry elections and diocesan deputy elections to be tied to a broader commissioning of lay service
- To thank/acknowledge donors
- To address one or two big picture questions which the leadership wishes to hear responses from the entire congregation
- For reports to be sent in advance and approved/discussed based on consent agenda



Check with your diocesan canons, but aside from presentation of the annual parish finances, these meetings are able to be rethought



Changing the date of the annual meeting

Date is frequently specified in diocesan canons and/or parish bylaws

While not possible in every diocese, some congregations can change date of annual meeting

Things to consider:

- Must still publish year-end financial report in late January (or at close of fiscal cycle)
- Requires vestry nominations and upcoming year's budgeting approval process be addressed immediately in late August and September (generally prior to diocesan convention)
- December vestry meeting becomes opportunity to invite incoming and outgoing vestry members
- Allows congregation to hit the ground running in January



Best resources for annual meetings

Diocesan canons and parish bylaws

ECF Blog Posts and articles:

- Greg Syler, "A New Year's Gift? Move the Annual Meeting"
- Nancy Davidge, "Changing the Scorecard"

Commissioning Liturgies

- Commissioning for New Parish Leaders tool on *ECF Vital Practices*
- The Book of Occasional Services (p.193)



Vestry orientation and vestry retreat

Opportunity to "form" group

- Emphasis on fellowship and orientation

From "Create a holy time away for your ves

- Where will it be held?
- Vestry members only?
- Who will lead it?
- How will spirituality and worship be incorporated?
- Will it be more than 24 hours?
- What should the content focus be?
- How will we name our values?
- What if there is conflict in the vestry?



Vestry orientation and vestry retreat

Content ideas:

- Loren Meade's article "Bootstrap Your Vestry Retreat"
- Anna Olson's "Snapshot of an Urban Neighborhood"



Best resources for vestry orientation and vestry retreat

Orientation

- Sandy Kolb, "Framework for Vestry Success"
- Donald Romanik, "You're a New Warden: Now What?"

Retreats

- Randy Ferebee and Alan Akridge, "Create a holy time away for your vestry."
- Loren Mead, "Bootstrap your vestry retreat."
- Donald Peeler, "Build Bonds of Joy in a Spirited Retreat."
- Episcopal Camps and Conference Centers



Discussion on next steps

**Check out resource sheet for “Vestries:
The Next Six Months”**

Annual Stewardship

- Send recording of ECF webinar “Lackluster Stewardship” to stewardship committee
- Prioritize annual stewardship energies on “committed” rather than “converted” or “non-committed”
- Choose a stewardship theme that incorporates impact+vision
- In addition to letter, conduct one-on-one conversations with “committed” group
- Thank people in seven different ways



Discussion on next steps

Nominating and electing new vestry members

- Have nominations committee read “Build a Healthy Vestry” and/or watch recording “Identifying and Recruiting New Leaders”
- Plan two one-hour discernment sessions for potential vestry nominees
- Publicize and hold one-on-ones with “committed” individuals who can become stronger congregational leader
- Keep track of responses when they come in (will be useful in next year’s process)
- Elect vestry at annual meeting



Discussion on next steps

Annual Meetings

- Check with your diocesan canons and parish bylaws and consider restructuring agenda as needed

Vestry Orientation and Vestry Retreat

- Begin planning vestry retreat using questions from "Create a Holy Time Away for Your Vestry"
- Plan retreat as opportunity for orientation of new members and fellowship
- Consider innovative content ideas such as Anna Olson's "Snapshots from an Urban Neighborhood"



Upcoming Webinars

Basics of Endowment (October 15, 2014- 7pm-8pm EDT)
This workshop reviews basic principles and best practices for endowment management. You will examine important, and easy to use, documents to use for structuring your endowment and for clarifying its purpose. Participants will also learn about endowment policies and investment options which not only seek to protect an existing endowment, but will demonstrate how endowments can be used as to enhance your ministries and overall mission, and build trust and confidence among your potential donors. Presented by Ken Quigley, ECF Program Director and Lynn Mander, Program Consultant.

[Click here to learn more and register.](#)

Communicating Stewardship Year-Round (October 21, 2014- 7pm-8pm EDT)
Your congregation's made a commitment to a year round stewardship and gratitude program: Your next step is to develop a communications plan that is fun, engaging, and deeply spiritual – and also practical. In this workshop, you'll learn ways to build a communications plan centered on starting with your congregation's stories of ministry and faith and primarily using resources already in place. Presented by Nancy Davidge, Associate Program Director, ECF.

[Click here to learn more and register.](#)

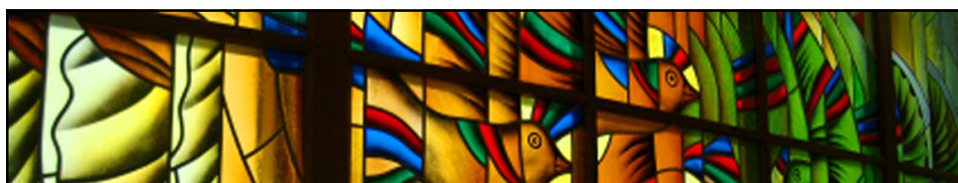
Planificación estratégica para las feligresías (October 28, 2014- 7pm-8pm EDT)
¿Cuál es la diferencia entre la "misión" y la "visión" de una congregación? Esta conferencia web se centra en los principios básicos de un proceso de visión y planificación. Los temas cubiertos incluyen definiciones claves, ideas para empezar, y los ejemplos de las congregaciones episcopales que están participando en la visión y los procesos de planificación también. Este está dirigido a personas y grupos que se inician en los procesos de la visión y la planificación. Presentado por el Rev. Juan Angel Monge, Asesor de ECF, Diócesis de Puerto Rico

[Click here to learn more and register.](#)

Preparing for a Diocesan Campaign (November 5, 2014, 1pm-2pm EST)
Capital Campaigns are won or lost long before the first glossy brochure goes to press. And nowhere is the planning phase more critical than in the complex territory of a diocesan campaign. This webinar will address what steps you should take, what staffing and resources you'll need, and how to integrate campaign planning with the many demands already facing a diocesan staff. Presented by Terri Mathes, ECF Senior Program Director.

[Click here to learn more and register.](#)





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