

Three Questions for Participants

How long have you been on the vestry?

*Just elected!, 0-1 years, 1-2 years, 3-4 years,
5+ years, 10+ years*

What is your role on the vestry?

Senior Warden, Junior Warden, Clergy, Vestry Member, Treasurer, Secretary/Clerk

How would you rate your experience/expertise with vestry leadership?

Completely new to this, Still relatively new, Some knowledge and experience, Strong knowledge and experience, Very strong knowledge and experience



Technical Notes

- All participants are currently muted to cut out background noise and audio interference
- To start your web cameras, press “Start by Web Cam” button and “Start Sharing”
- If you have questions, please type them into the chat box on the right-hand side of the screen
- PDF’s of the slides are downloadable
- This webinar is being recorded and will be made public



Vestry Orientation

January 12, 2017

Miguel Escobar and Brendon Hunter
Leadership Resources

The Episcopal Church Foundation (ECF)

Independent, lay led organization, founded in 1949

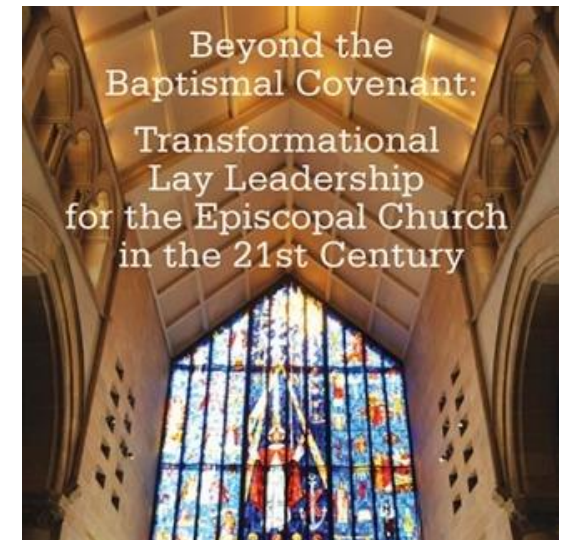
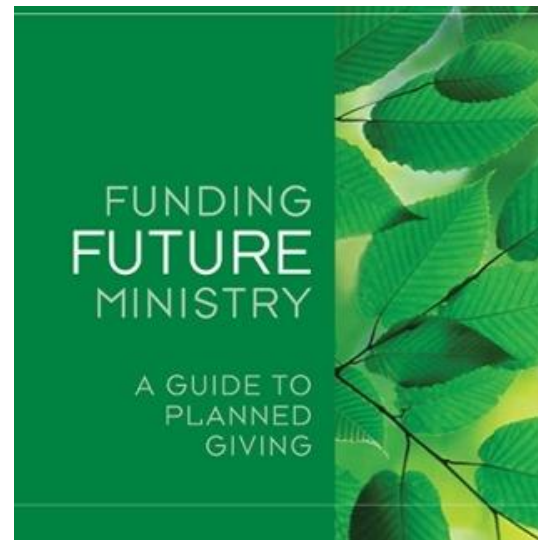
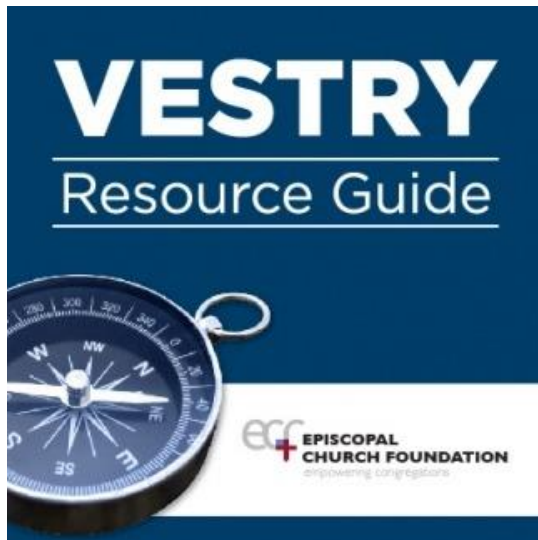


Empowers congregations through visioning and planning, leadership development, and raising financial resources for ministry

Through our programs, ECF is helping to build a Church characterized by:

- Lay and clergy leaders work together to transform the Church
- Healthy, vital, vibrant Episcopal communities of faith
- Meaningful opportunities for Christian stewardship and effective fundraising
- Innovative, mission-based ways to be the Church of the future

ECF Publications



ECF publications are distributed by Forward Movement, www.ForwardMovement.org or by calling 800-543-1813.

Presenters



Miguel Escobar
Managing Program Director
mescobar@episcopalfoundation.org

Brendon Hunter
Program Director
bhunter@episcopalfoundation.org

Opening prayer

Disturb us, Lord, when we are too well pleased
with ourselves,
When our dreams have come true
Because we have dreamed too little,
When we arrived safely
Because we sailed too close to the shore.

Disturb us, Lord, when
With the abundance of things we possess
We have lost our thirst
For the waters of life;
Having fallen in love with life,
We have ceased to dream of eternity
And in our efforts to build a new earth,
We have allowed our vision
Of the new Heaven to dim.



Disturb us, Lord, to dare more boldly,
To venture on wider seas
Where storms will show your mastery;
Where losing sight of land,
We shall find the stars.
We ask You to push back
The horizons of our hopes;
And to push into the future
In strength, courage, hope, and love. AMEN.

- Prayer attributed to Sir Francis Drake

Presentation overview



The role of the vestry



Key vestry responsibilities



Tools and resources for new vestry leaders



Potential next steps

The role of the vestry

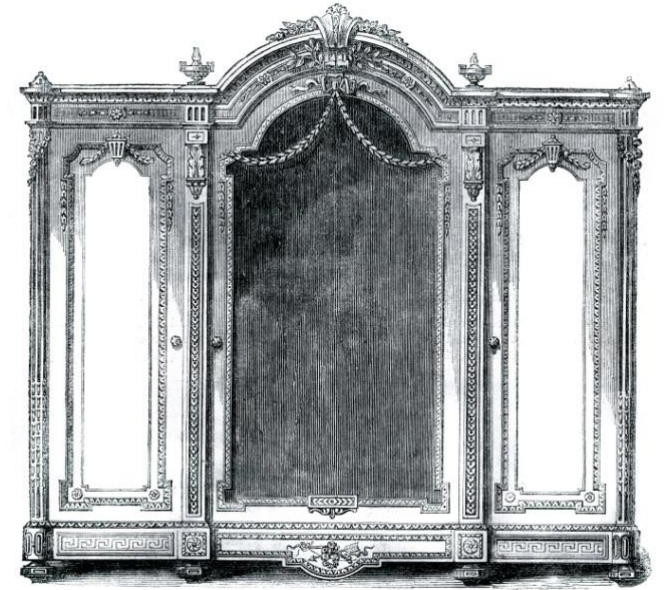
A bit of history

- 'Vestry' as the parish robing room
- With congregational growth came 12 representatives with life-long terms
- Today vestries reflect diversity of congregation (including youth!)

The average vestry today

- New members are elected at annual parish gathering
- Size of vestries range between six to twelve representatives
- Clergy generally serve as presiding officers (rector, priest in charge, vicar)
- There are usually two wardens

But what do vestries do?



The role of the vestry

Discernment

- Discerns where God is calling the congregation in your location, at this particular point in time

Mission and Vision

- Helps articulate the mission and vision of the congregation

New Leaders

- Identifies new leaders for the congregation and wider Church

Stewards Resources

- Manages resources and finances of congregation

The role of the vestry

What the Canons say...

- Shall be agents and legal representatives of the parish in all matters concerning its corporate properties; and the relations of the parish to its clergy.
- Shall ensure that standard business methods will be observed.
- When a Parish is without a Rector, the officers of the vestry are responsible for the continuation of worship, including the calling of a new rector.
- The vestry has responsibility for nominating persons for holy orders.



Vestry Resource Guide, page 9

The role of today's vestry

What areas have leaders needed, or will need the most help in? Source: ECF Vital Practices surveys from 2015 and 2016

Vision and Planning

- Difficulty of creating a congregational vision - that is, one shared by all, with input from all
- Difficulty of planning for the future when overwhelmed with immediate needs

Evangelism

- Struggle to share the hope that is in us
- Ability to attract and retain new members

Stewardship

- Needs are many, getting all members to respond to that need is difficult
- "What we're doing now isn't effective"

Leadership

- Roles and process for vestry meetings
- Inspiring and developing a unified and functioning team

Communications

- Leaders' role as communicators
- Capacity issues around new technologies
- Integrating internal and external

Small Churches

- How to be sustainable: are there enough resources for program and ministry?
- Ability to afford and support clergy or staff

The role of today's vestry

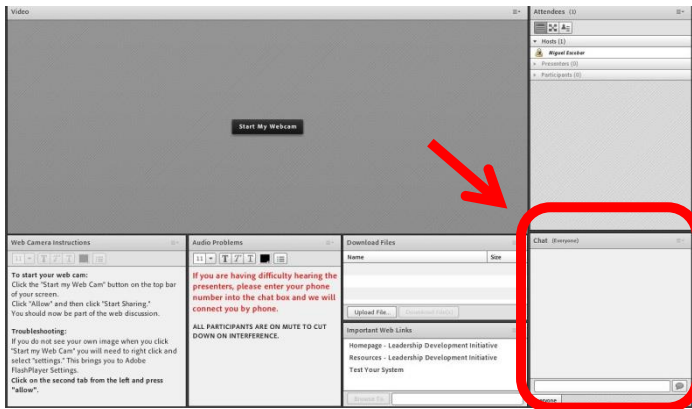
Discerning God's direction amidst many changes, including:

- Decreasing size of mainline Protestantism, fluidity in choice of faith (or lack thereof)
- Decline in Episcopal Church membership and aging population (Average Sunday Attendance is 60 people)
- Increased reliance on and necessity for effective lay leaders
- Diminished financial resources, inability to afford existing buildings
- Increase in Latino and other ethnic or multi-cultural congregations
- Significant generational differences in giving patterns and commitment to stewardship



Questions or comments?

- How do you see the role of the vestry in your congregation?
- Do you see any demographic or cultural change?



Use the chat box in the lower right side of your screen.



Key vestry responsibilities

Discerning God's mission and vision for the congregation

- The question of 'why'
- Getting prayer and Bible study on the regular meeting agenda, creating opportunities for deeper reflection
- Restructuring vestry to prioritize discernment of mission and vision

Defining 'mission' and 'vision'

- One shared mission but each congregation is carrying this out in different ways
- ECF defines 'mission' as that which God is calling us to do
- 'Vision' is what the church and world looks like once our mission has been fully realized



First-time vestry member suddenly realized tonight's meeting was going to be about more than just the budget.

Key vestry responsibilities

Identifying new leadership

- Canonical role in identifying new rector and naming postulants for holy orders
- Broadly speaking, vestries have a role in identifying, recruiting new leadership – both lay and clergy

Vestry nomination and election processes

- Wide variance in how individuals are nominated and elected to vestries
- Recently, greater focus on nomination process as period of extensive discernment

What the church can learn from community organizing

- Being proactive about identifying new leaders
- Conducting one-on-ones to explore areas of common interest
- Want something done? Ask a busy person!



Key vestry responsibilities

Being good stewards of property and resources, creating a financially vital congregation

Fiduciary

- Ensuring proper asset and financial management and oversight
- Salary and benefits for clergy and lay staff

Frequently carried out through

- Diversification of income sources
- Annual stewardship campaigns (annual budget)
- Periodic capital campaigns (building maintenance/expansion, alleviation of debt)
- Setting sound endowment policies and developing planned giving policies

Liability

- Violation or neglect of fiduciary responsibilities, contracts, or any other legal agreements (employment, wrongful termination, etc.)



Key vestry responsibilities

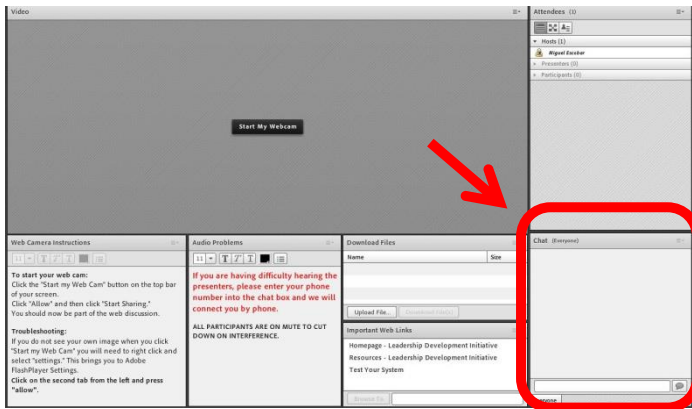
Meeting effectively

- Vestries meet regularly and retreat regularly
- Effective vestry meetings are guided by covenants which lay out norms and expectations for vestry members
- While rector is considered the presiding officer, he/she doesn't necessarily need to preside at meetings
- Effective meetings begin with significant time spent in spiritual practice
- Place discernment of God's mission and vision at center of ongoing work
- Will spend bulk of time discussing strategic, big-picture concerns regarding the life of the congregation
- Will place reporting from committees at the very end of the agenda, frequently for consent



Questions or comments?

- What are some of the key responsibilities of the vestry?
- Which do you see as the top priority?
- Where does God come into this?



Use the chat box in the lower right side of your screen.



Vestries' role changes depending on church size

The Family Church:	0 – 75 ASA
The Pastoral Church:	76 – 140 ASA
The Transitional Church:	141 – 224 ASA
The Program Church:	225 – 800 ASA
The Resource Church:	800+ ASA

ASA = Average Sunday Attendance

Source: [http://www.episcopalchurch.org/files/CDR_series1\(1\).pdf](http://www.episcopalchurch.org/files/CDR_series1(1).pdf)

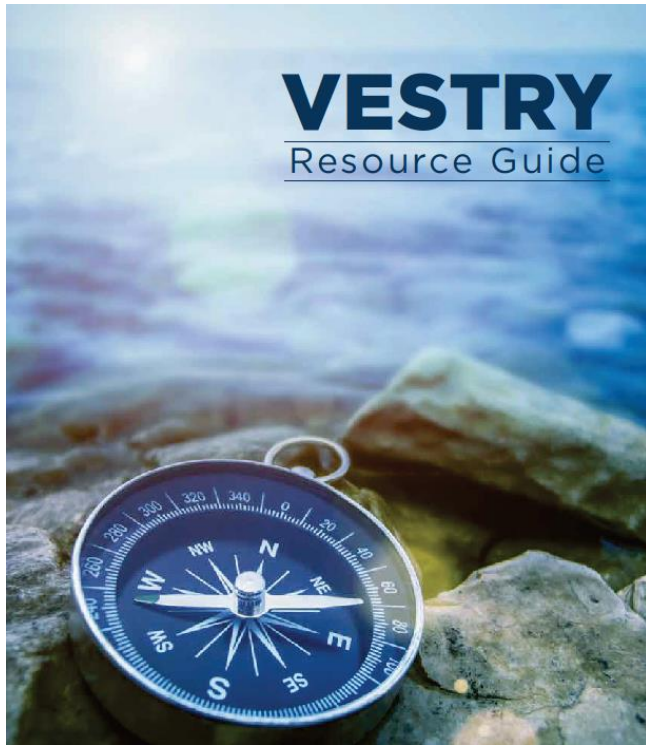
Tools and resources for vestries



Toolbox:

- Canons of The Episcopal Church and your diocese
- Relevant state incorporation laws
- By-laws of the parish
- Mission statements of your diocese and congregation
- History of your congregation
- Your congregation and community demographics/trends
- Book of Common Prayer
- Bible

Tools and resources for vestries



 EPISCOPAL
CHURCH FOUNDATION
empowering congregations

Chapters include:

- The Mission-Focused Vestry
- Building Leadership Teams
- Vision & Strategic Thinking
- Stewardship & Vision

Plus...

- Discussion questions and related resources
- Vestry job descriptions, vestry covenant, and stewardship statement
- Commissioning of wardens and vestry

Distributed by Forward Movement

www.forwardmovement.org or 800-543-1813

Tools and resources for vestries

The screenshot shows the ECF Vital Practices website. At the top left is the logo "ecf Vital Practices for leading congregations". To the right are links for "Sign In", "Subscribe", "Donate", and "Contact", and a search bar. Below is a green navigation bar with links: HOME, VESTRY PAPERS, VITAL POSTS, YOUR TURN, TOOLS, WEBINARS, TOPICS, ABOUT US. The main content area features a large article titled "Beginning Your Vestry's Work" with a photo of hands stacked together. To the right is a "Vital Posts Blog" section with two articles: "Bearing gifts, hosting parties" and "Can Episcopalians do multisite church?". Below the main article are four boxes: "Multimedia" with a Facebook icon, "News" with a "VESTRY Resource Guide" icon, "Subscribe" with a church interior icon, and "News" with a "FINDING Your Place" icon. At the bottom right is a "Tools" section with three articles: "The Vestry Hand-Off", "Consent Agendas", and "Digital Giving Models & Tools".

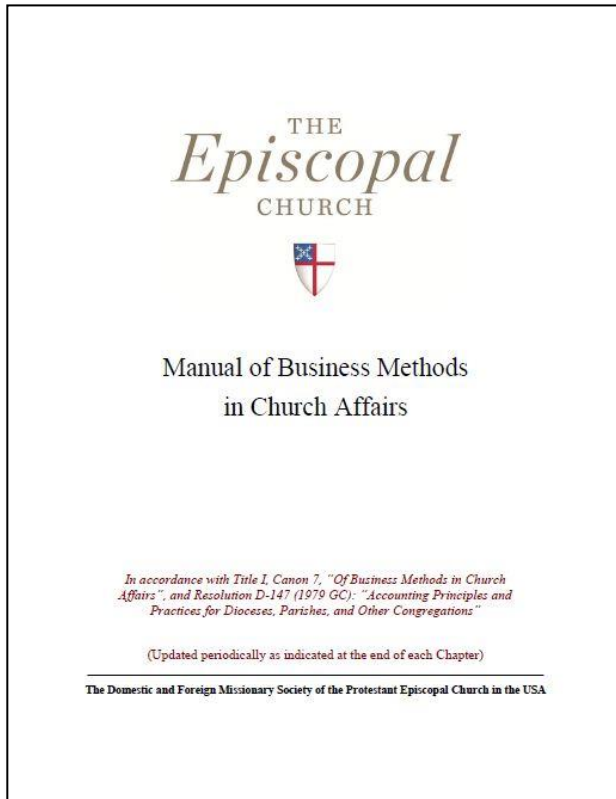
ECF Vital Practices

www.ecfvp.org

Subscribe to ECF Vital Practices for articles, tools, and resources by and for congregational leaders.

With a subscription, you'll receive 12 issues of Vestry Papers, notification of new Vital Posts blogs, as well as the monthly Vital Practices Digest delivered to your inbox, all for free.

Tools and resources for vestries



This guide covers all the essentials for church financial and record keeping in language and format simple enough for anyone to understand.

www.episcopalchurch.org/page/manual-business-methods

Chapters Include

- Financial Practices and Oversight
- Insurance
- Parochial Reports and Record Keeping

Tools and resources for vestries

The NEW ExecutivInsite Report


Prepared for: Trinity Cathedral - Cleveland
Study area: 3 mile radius - 2230 Euclid Ave Cleveland OH 44115-2405

Base State: OHIO
Current Year Estimate: 2012
5 Year Projection: 2017
Date: 9/1/2012
Semi-Annual Projection: Spring

This ExecutivInsite Report has been prepared for Trinity Cathedral - Cleveland. Its purpose is to "tell the demographic story" of the defined geographic study area. ExecutivInsite integrates narrative analysis with data tables and graphs. Playing on the report name, it includes 12 "Insites" into the study area's story. It includes both demographic and beliefs and practices data.

ExecutivInsite is intended to give an overview analysis of the defined geographic study area. A defined study area can be a region, a zip code, a county or some custom defined geographic area such as a radius or a user defined polygon. The area of study is displayed in the map below.

INSITE	PAGE
Insite #1: Population, Household Trends	2
Insite #2: Racial/Ethnic Trends	3
Insite #3: Age Trends	4
Insite #4: School Aged Children Trends	6
Insite #5: Household Income Trends	7
Insite #6: Households and Children Trends	9
Insite #7: Marital Status Trends	10
Insite #8: Adult Educational Attainment	11
Insite #9: Employment and Occupations	12
Insite #10: Mosaic Household Types	13
Insite #11: Charitable Giving Practices	14
Insite #12: Religious Practices	15



THE STUDY AREA

More Information
Please refer to the last page of the report for additional notes and interpretation aides in reading the report. Not all of the demographic variables available in the MI System are found in this report. The FullInsite Report will give a more comprehensive view of an area's demographics and ViewPoint a fuller view of its beliefs and practices.

*The Office of Research provides free parish reports and community profiles for **every congregation** in the Episcopal Church.*

www.episcopalchurch.org/page/studying-your-congregation-and-community

Information Available

- Parish Report (Membership, Average Sunday Attendance and Pledge & Plate) most recently available eleven years
- Community Profile (3 mile radius of your congregation) with 12 demographic insights including population, age, and household statistics and trends

Potential next steps

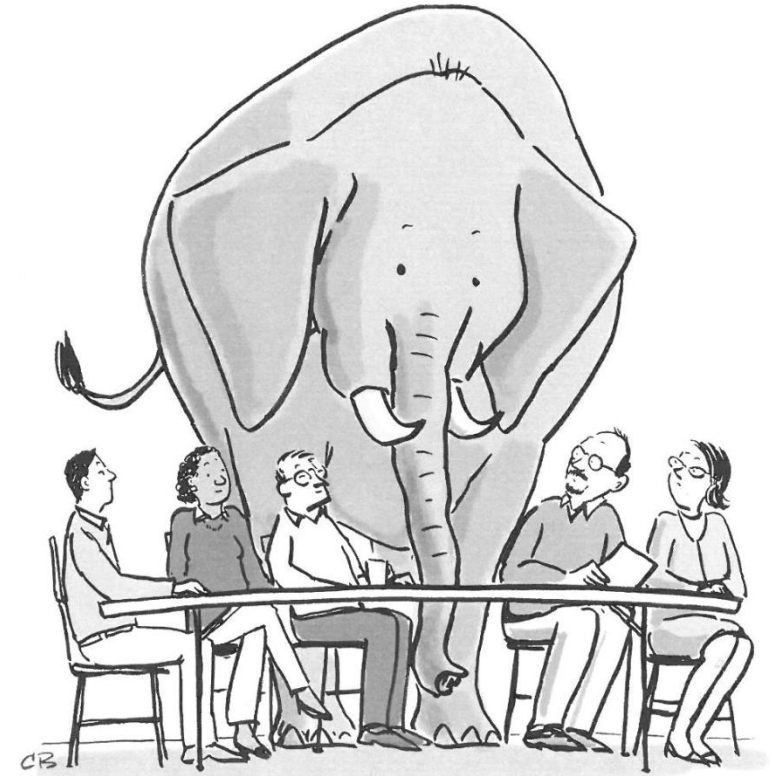
- Research diocesan canons to see if youth can be elected to serve on your vestry
- Consider the size of your vestry. Would increasing/decreasing number of elected members be helpful?
- If you are clergy, consider whether you need to preside at vestry meetings
- Review canonical requirements and liabilities associated with being a vestry member. Does your vestry carry these out?
- Over time, move the focus of vestry meetings toward discernment of God's mission and vision for the congregation. Consider structural changes to do this
- Begin regular vestry meetings with an extended period of prayer, Bible study, or other practice to begin discerning God's mission & vision



Newest vestry member Heather's suggestion to remove the pews was an excellent conversation starter.

Potential next steps

- Review sources of income that comprise the annual operating budget. Is there a diversity of income streams?
- Watch the ECF's webinar "The Basics of Parish Finances"
- Discuss effectiveness of annual stewardship campaigns, whether the congregation needs a capital campaign, and explore current endowment spending policies
- Learn more about setting up a planned giving program in your congregation (Funding Future Ministry)
- Strengthen the nomination and election process for new vestry members
- Create or revise the vestry covenant at next vestry retreat
- Move toward a 'consent agenda' style meeting for approval of reports
- Build your toolbox



Someone in the vestry finally addressed the elephant in the room.

Contact us

ECF website: www.episcopalfoundation.org

ECF Vital Practices: www.ecfvp.org

Email: ecf@episcopalfoundation.org

Phone: (800) 697-2858