

# VESTRY

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## Resource Guide

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REVISED BY NANCY DAVIDGE, EDITOR, AND SUSAN ELLIOTT, WRITER

A PROJECT OF THE EPISCOPAL CHURCH FOUNDATION

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ECF is an independent, lay-led organization that helps congregations, dioceses, and other Episcopal communities of faith engage in visioning and planning, develop leadership, and raise and manage resources for ministry.

### **Purpose**

To be a catalyst, agent, and advocate for transformation, renewal, and growth in the Episcopal Church in practical, innovative, and spiritually-grounded ways.

### **Mission**

To be a comprehensive and holistic resource that helps vitalize Episcopal faith communities.

### **Vision**

ECF is known as the ministry partner for helping build and sustain transformational faith communities.

### **Core Values**

- Transformation
- Discipleship
- Partnership
- Independence

### **Desired Impacts**

- Equipped and empowered lay and clergy leaders partnering to bring about transformation, renewal, and positive change
- Vital Episcopal communities of faith
- Relevant and meaningful opportunities to live out Christian stewardship and effectively raise financial resources for ministry
- New, innovative, and mission-based ways to be the Episcopal Church of the future

# FOREWORD

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On behalf of the Episcopal Church Foundation (ECF), I am pleased to present the fourth edition of the *Vestry Resource Guide*. An independent, lay-led organization, ECF helps Episcopal faith communities engage in visioning and planning, develop leadership, and raise resources for ministry.

Vestry service and other leadership roles at the congregational level are important, challenging, rewarding, and fulfilling work. This is also holy work and requires a vast array of skills and abilities from a diverse group of people who are faithful, committed, and open to the Spirit.

In developing this latest version of the *Vestry Resource Guide*, we spoke with dozens of congregations and hundreds of faithful Episcopalians who are seeking to build vital faith communities with the capacity to empower people to live out the gospel as Christian disciples. We received numerous comments, questions, and other feedback that helped shape the content of this revised guide; this information will also impact our other programs, products, and services.

This is what we have learned and are now sharing with you:

- The most dynamic congregations are those that identify, nurture, and support visionary leaders, especially vestry members, who are committed to the spiritual vitality of the congregation.
- In order to function, thrive, and grow, congregations need to embrace a leadership model that focuses on lay and clergy partnerships and a team approach to engaging in the work of ministry.
- In partnership with the clergy, vestries need to become the spiritual, missional, and strategic leaders of the congregation.
- In addition to exercising important fiduciary roles and responsibilities, vestries must engage in ongoing visioning and planning, leadership development, and identifying the resources necessary for local mission and ministry.

- Congregational leaders, especially vestries, want access to current, relevant, and practical tools and resources to support their work.

In response to these observations and premises, ECF has designed the new *Vestry Resource Guide* to help you lead your congregations in dynamic and innovative ways.

While the *Vestry Resource Guide* addresses the issues and concerns of parishes and missions of all sizes and configurations, ECF recognizes that most congregations in The Episcopal Church tend to be small (with an average Sunday attendance of one hundred or less) with limited paid or professional staff. Consequently, the *Vestry Resource Guide* is designed to meet the needs of all congregations, large and small.

Finally, the *Vestry Resource Guide* is just one of many tools, resources, and programs ECF provides to congregations, dioceses, and other faith communities throughout The Episcopal Church. We are especially excited and confident that this new edition will be a valuable resource to vestries and other leaders as you navigate the challenges, opportunities, and complexities of a changing church and world.

We pray for your continued strength, courage, vision, patience, inspiration, and joy as you embark on this leadership journey—discerning what God is calling you to be and do as the Body of Christ known as The Episcopal Church in your own particular time and place.

Faithfully,



Donald V. Romanik  
President

Episcopal Church Foundation

# ACKNOWLEDGMENTS

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This revision is the result of many conversations with congregational leaders from across The Episcopal Church. Before changing a single word, we asked current and former vestry members, clergy, and diocesan staff to share what they see as the primary challenges and opportunities vestries face today. We asked if they were familiar with the *Vestry Resource Guide*, did they use it, and if so, what was valuable and what seemed out of date or unclear. We reviewed the feedback offered by ECF Vital Practices and *Vestry Papers* subscribers through our reader surveys as well as feedback from the ECF Vital Practices advisory committee.

We also queried our ECF leadership resources and financial services consultants about their experiences working with congregations, again listening for identified challenges and needs that the *Vestry Resource Guide* might address.

From these conversations and experiences, clear themes began to emerge; the result is this revised version of the *Vestry Resource Guide*. Thank you to all who contributed to this effort.

**Special appreciation is offered to the individuals who served as readers or consultants and offered valuable feedback on our manuscript:**

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**And, thank you to all of the contributors to the earlier editions of the *Vestry Resource Guide* for providing a solid foundation on which to build.**

# PREFACE

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You have been elected to serve on the vestry, called to leadership in your faith community. We thank you for saying “yes” to this call to serve the body of Christ through your church. The willing hearts and hands of God’s people carry the light of Christ into the world in this and every age.

The catechism in *The Book of Common Prayer* says that the mission of the Church is “to restore all people to unity with God and each other in Christ.” That broad, overarching purpose becomes more specific and individual when you gather with the vestry to consider where God is calling your faith community in this day and time. Whether your congregation is small—and 69 percent of Episcopal churches have an average Sunday attendance (ASA) of 100 or less—or large, like the 4 percent with an ASA of 300 or more (or somewhere in between), you will face similar challenges.<sup>1</sup>

The face of religion is changing in the twenty-first century. In the United States, Americans are increasingly switching religions or claiming no religious affiliation. The Judeo-Christian tradition is no longer the dominant cultural force. Membership in mainline Protestant churches is declining and aging. In The Episcopal Church, we are experiencing an increase in Latino and other ethnic or multicultural members and congregations as the population becomes more diverse. Emerging church initiatives, nontraditional models—with proactive bishops and church leaders—are testing new ways to reach out to those who are disaffected or indifferent to Christianity. Changes in patterns of giving, diminished financial resources, and the costs of supporting existing buildings are providing significant challenges to many congregations. There is a growing recognition of the need for effective lay leadership at all levels of the Church. An increasing number of small churches are managing—some of them quite well—with part-time clergy.

What does this mean for you as a congregational leader? It means seeing incredible, surprising possibilities in the challenges. It means overcoming the all-too-human resistance to change and to boldly try new things. It means opening up to what the Spirit has to say through the people and community you serve. It means sharing your gifts with abandon. You have been called to service at a time when our faith communities need leaders willing to say yes to God—men and women who can build a shared sense of purpose and articulate a compelling vision of the future—leaders just like you.

1. Episcopal Domestic Fast Facts Trends: 2009-2013, The Episcopal Church.

## ABOUT THIS EDITION

Developed by the Episcopal Church Foundation (ECF) for the leaders of Episcopal communities of faith, this fourth edition of the *Vestry Resource Guide* reflects the changing landscape of leadership and congregational development. In the past, many congregations operated with the priest as the central leader and the vestry in supporting roles. New models of ministry call for shared leadership, inviting clergy and lay leaders to serve together. Of course, Church canons (rules) dictate some roles to clergy and others to lay leaders—we also look to the baptismal covenant, which calls on all people to seek and serve Christ.

This new edition of the *Vestry Resource Guide* reflects the concept of shared ministry and emphasizes the role of the governing body in strengthening the leadership capacity of congregations. Chapters on vision and planning as well as building strong leadership teams reflect our work with congregations across the country. We've reorganized content relating to governance, administrative oversight, and stewardship, and included stories of congregations that have been willing to adapt and change. At the end of each chapter, there is a list of related resources.

For more than sixty years, Episcopal Church Foundation has been committed to strengthening the leadership and financial capabilities of Episcopal congregations, dioceses, and related organizations to pursue their mission and ministry. As a lay-led organization, we are guided by four key principles:

- We equip and empower lay and clergy leaders, partnering to bring about transformation, renewal, and positive change
- We help build healthy, vital, and vibrant Episcopal communities of faith
- We provide relevant and meaningful opportunities to live out Christian stewardship and effectively raise financial resources for ministry
- We seek new, innovative, and mission-based ways to be The Episcopal Church of the future

We are pleased to partner with Forward Movement, a ministry of The Episcopal Church, to produce and distribute the *Vestry Resource Guide*. Forward Movement shares a common vision of providing resources for discipleship and leadership.

The *Vestry Resource Guide* is designed to support and strengthen the leadership of all congregations and recognizes that the traditional parish model of a full-time rector and vestry is not the only way today's churches are organized. Congregations without a full-time priest are juggling roles formerly held by

the rector. Paired congregations, clusters, and regional ministries are often led by joint governing bodies. Many dioceses support innovative team ministries focused on the ministry of all the baptized. Emergent churches and new faith community plants are developing alternative structures to support their life and mission. A congregation with mission status has a mission, executive, or bishop's committee. A cathedral is likely to have a chapter instead of (or in addition to) the congregation's vestry. If your congregation fits one of these other models, you will need to understand how your situation is different from that of a vestry. Diocesan canons and your congregation's bylaws are good places to begin that research.

Because the traditional model of a parish led by a rector and vestry remains the most common, this edition employs the language of rector and vestry, though we use "church," "congregation," and "faith community" in addition to parish. References to Episcopal communities of faith include Evangelical Lutheran Church in America (ELCA) and other denominations that worship with an Episcopal congregation.

Language aside, we hope this edition of the *Vestry Resource Guide* proves a good and useful companion throughout your vestry service. And we encourage you to explore resources beyond it, beginning with ECF's Vital Practices website ([ecfvp.org](http://ecfvp.org)), where you can subscribe for bimonthly emails and blogs and also search by topic to learn what other congregations are doing to solve the very issues you face. ECF also offers events and webinars geared to our mission. Forward Movement ([forwardmovement.org](http://forwardmovement.org)) offers an array of resources, including daily devotions, Bible studies, and theological reflections. But do not stop here—there is a world of helpful resources, answers to questions, and inspiration, ready to be tapped.

## **Please Note:**

All references to the canons of The Episcopal Church and applicable state and federal laws, including publications, advisories, and other provisions of the Internal Revenue Code and Social Security Act, are to those in effect as of July 1, 2014. All of these provisions can and do change from time to time. In publishing the *Vestry Resource Guide*, the Episcopal Church Foundation is not providing any legal, financial, or other professional advice. Please consult your attorney, diocesan chancellor, accountant, financial advisor, or other professional if you have specific questions or concerns relating to the applicable canons or state or federal statutes or regulations as they relate to your unique situation or that of your congregation, faith community, or diocese.



# CHAPTER 1



## THE MISSION-FOCUSED VESTRY

Election to the vestry is exciting—a sign of your congregation’s confidence in you. But it can also be daunting. The challenges our churches face today can make a vestry person wonder at Jesus’ promise that his yoke is easy and his burden is light. We at ECF are in agreement, though, with retired bishop Henry Parsley. He writes in a *Vestry Papers* article that he misses vestry meetings. “Vestries should be one of the most exciting ministries in the church—joyful, in fact,” he writes. “Healthy, effective vestries make healthy, effective parishes. When rectors and vestries work together as a well-aligned team, extraordinary things happen for the mission of God.”

## VESTRY RESPONSIBILITIES

Vestry members are legal representatives and agents of a parish, charged with specific responsibilities by the canons of The Episcopal Church. They share leadership responsibilities with the rector. As legal representative and agent, the vestry functions much like the board of any nonprofit, with responsibility for finances and management of property and human resources. Many aspects of the vestry's role are defined by entities beyond the congregation—local, state, and federal laws, and diocesan and Episcopal Church canons—as well as by the church's own constitution and bylaws.

But your faith community is also where you wrestle with questions of faith and find meaning and purpose for your life. It's where life's small and large events

are marked and celebrated. So there is an important element of shared life and purpose in vestry leadership. You're not just *elected* to the vestry; you are *called* to a sacred ministry in your faith community.

### The Call to Vestry Service Today

In this time in the life of the Church, when laity and clergy are recognizing the benefits of shared leadership, your call means working collaboratively with fellow vestry members and the rector to create a vision and plan of action that reflects God's dream for the congregation. It means cultivating congregation-wide conversations about where God is calling your faith community. It means balancing your role in discerning God's mission and vision with sound stewardship of its property and resources.

## BEING A VESTRY MEMBER IN TODAY'S CHURCH

The Episcopal Church reflects the sweeping changes in American life and culture in the twenty-first century. As the United States grows more diverse, so do our churches. The fastest-growing demographic in The Episcopal Church is Latino members, with Asian membership, particularly in the West, coming in second. Evolving digital communications are bringing new ways for congregations to build community, network, and explore their faith. Greater fluidity in religious choice brings us new members from a variety of faith traditions.

Less encouraging for the Church is the impact of economic and political change on our faith communities. Downward mobility makes it harder for members, particularly younger households, to give as generously as previous generations to support their congregations financially. Political divisions over health care, immigration, gay rights, racism, and the role of government spill over into our congregations and dioceses, sometimes creating divisions that obscure our vision as followers of Jesus. While the Church has an opportunity—and obligation—to be a prophetic voice for issues of social justice, these conversations are not easy and sometimes result in fracture or significant discord.



Photo by Euchenist, Katie Forsyth, 2013

In addition, American society is increasingly secular. It is becoming more acceptable to be atheist, agnostic, or to say you are spiritual but unaffiliated with any particular faith. A growing number of children are raised in homes that do not teach or practice any formal religion (13 percent of Millennials as opposed to 5 percent of Baby Boomers)<sup>2</sup>. We cannot assume adults who were raised in the Church will return as in past decades, or that those who join us have more than a passing knowledge of the Bible or a basic understanding of Christian beliefs.

### What's A Vestry To Do?

As vestry members, we can wring our hands and bemoan the changes and challenges—or we can open our eyes to the hunger for meaning and the need in

our communities and the world around us. We can roll up our sleeves and get to work on finding ways to live discipleship authentically and figuring out Jesus' mission for our congregations today.

At ECF we see many ways in which churches are doing just that. Laity and clergy are working in partnership to discern relevant visions for their congregations. Small churches, unable to retain full-time priests, are forming collaborative ministries with neighboring denominations. Multiracial and multiethnic congregations are finding ways to build relationships that honor their diversity. Struggling faith communities are developing leaner models of church and ministry that utilize the gifts and skills of all.

Photo Courtesy of Diocese of Southwest Florida



2. "Born and Raised: More Americans Are Being Raised Without Religion and Choosing to Stay that Way" by Daniel Cox. Copyright ©2014 TheHuffingtonPost.com, Inc. [huffingtonpost.com/daniel-cox/born-and-raised-more-amer\\_b\\_3682847.html](http://huffingtonpost.com/daniel-cox/born-and-raised-more-amer_b_3682847.html)



Photo by Ken Garner

## FOCUS ON THE MISSION & VISION OF THE CONGREGATION

The shared responsibilities of the vestry and the rector can be described roughly as

- Discernment of God's call
- Identification of new leaders
- Stewardship and development of resources
- Special duties when a congregation is without a rector

We are convinced that the most important of these is discernment. The primary tasks for a vestry are discerning what God is calling your faith community to do and articulating a hopeful vision of the church and the world as God's mission. A clear mission and strong vision create a firm foundation for your decisions and actions.

### A New Kind of Leadership

Worried about replacing the leaky roof? Struggling to squeeze a little more out of the budget? Distracted by grumbling about the rector's pastoral style or the organist's hymn choices or the shortage of volunteers for church school?

The challenges we face today call for a new kind of leadership from our vestries, one that begins with asking questions: *Why? What does this have to do with Jesus? How do our efforts help us grow as followers of Christ?* Before the vestry can begin to answer these

questions, it needs to spend time building a strong and healthy lay and clergy team with the rector. It needs to devote an upfront portion of its time to prayer, scripture study, and worship. It needs to engage in open and honest dialogue and to listen deeply to one another, the congregation, and the community beyond the church walls.

When the vestry is able to do that, the Holy Spirit has the opportunity to be heard. Perceptions and ideas can begin to coalesce in a mission that makes sense for the congregation in this time and place, a mission that clearly has to do with Jesus and with helping its members grow as followers of Christ.

When we prayerfully ask and answer these questions, the challenges of tight budgets, leaky roofs, and community criticism can be seen in the light of Christ's own mission for your congregation. They can be understood in relation to a hopeful vision of your church's future.

We are not advocating a mission and vision carved on tablets of stone or placed prominently on your website and other communications for all time. We see the vestry's work in mission and vision to be ongoing and adaptive. The Spirit is ever on the move, and we are called always to be open to new directions, new possibilities, and new life.



Photo Courtesy of Diocese of Southwest Florida

## BUILDING LEADERSHIP FOR TODAY & TOMORROW

Second only to discerning God's mission is the vestry's responsibility for raising up new leaders who can help carry that mission forward. And the good news in this more secular age, when church attendance is not considered mandatory, is that the people in our faith communities are there because they want to be. They are looking for ways to live Christ's love in the world—ready and eager to share their gifts. Many of them are great candidates for leadership in the community. They just need to be asked.

### Your Role as Recruiter

The first step in raising up new leaders is to be an enthusiastic ambassador for the vestry's emerging mission and vision. You may or may not be comfortable talking to a packed room, but you can make yourself accessible and talk with members of the congregation informally. Tell them what you've learned and share the vestry's process and its hope. Then, spend some

time listening. Some will be anxious about change; others will be excited and energized. In that second group you'll find the leaders your church needs to keep moving forward.

The more diverse that group, the better. The church needs experienced leaders, and it needs beginners. It needs longtime Christians and people who have just walked in the door. It needs leaders from the congregation's heart and from its edges. It needs leaders who reflect the rich mix of the community.

Talk to people and learn what they care about. Learn about their skills and experience. Look beyond the usual suspects. Don't be afraid to take a chance on someone who is new to the community—maybe even new to the gospel. You can stay in touch and help them along. New leaders grow and flourish with a little coaching and support.

## THE POWER OF COLLABORATION

Small churches in Florida, Colorado, Oregon, and elsewhere are teaching us all the value of collaborative ministry. In some areas the goal is growth, and in others it is a matter of survival. But the lesson we take from their collaborative efforts is consistent and not a new idea at all—we are all part of Christ's body.

Congregations may define and develop collaborative ministry in different ways, based on their contexts and needs. Some congregations share clergy, even across denominations. Some team up on programs for adults or occasional worship. We see frequent collaboration on community outreach and youth groups. All are finding that working together brings new energy and vitality to their communities.

We encourage you to learn from these innovative faith communities and to watch for opportunities to partner with congregations in your diocese or deanery, as well as other faith communities and organizations in your area. You'll build new relationships and gain a broader understanding of the way in which we are all Christ's hands and feet in the world. A lesson from preschool still holds true in our churches today: we can do a lot more when we cooperate and work together.

### A Blueprint for Change

One of the largest Episcopal/Anglican churches in Brooklyn, New York, St. Augustine's represents what can happen when the vestry and clergy work together as partners. Crippled by debt, with buildings in disrepair and membership dwindling, the rector and vestry of St. Augustine's resigned in 1998, enabling the bishop to step in and assume control of its affairs as an aided parish.

The congregation had struggled several times in the past and had been rescued in each instance by a strong rector. This time, working with the bishop, diocesan staff, and elders in their congregation, the members learned a new model for leadership, one in which they understood their role as full partners in making the decisions that shape their church's life and ministry. The interim priest appointed by the bishop fully supported the new model, promoting his belief in the importance of a strong lay and clergy leadership team as he visited and talked with parishioners.

As issues were identified and prioritized, the bishop appointed committees made up of longtime and newer members of the congregation. In partnership with the rector, they went to work on three primary areas of focus—spirituality and formation, mission and ministry, and management and finance. Meeting monthly, the committees drew on the skills and talents of the congregation and the neighboring community as they developed more organized ways to manage the church's affairs and established clear procedures for handling finances.

In 2003 St. Augustine's was restored to full parish status. Today it is a growing, vibrant community, engaged in serving and welcoming its surrounding community, involved in public advocacy, and active in all levels of The Episcopal Church. It is once again financially viable, and its buildings are in good repair. And it is a beacon for what strong lay and clergy teams can accomplish.

## DISCUSSION QUESTIONS

What led you to vestry service?

What gifts do you bring? As you reflect on this question, think beyond your work-related skills to your interpersonal style, life management skills, personal strengths and weaknesses, as well as your spiritual gifts.

What is your understanding of what God is calling you, and your congregation, to do? How did it emerge? How does this understanding influence your congregation's direction?

What is your vestry's leadership style? How would you describe the relationship between the vestry and the rector? The vestry and the wardens? The wardens and the rector?

What issues are facing your vestry at this moment? What might happen if you started each conversation by asking: "Why? What does this have to do with Jesus? And how is this effort helping us to grow as followers of Christ?"

## RELATED RESOURCES

Where do you begin to delve deeper into these topics? Or find the resources mentioned in this chapter? Here are some places to start:

Appendix, page 68

Look to your diocese for:

- Diocesan canons
- Forms, protocols, processes, and procedures specific to your diocese
- Resources related to congregational development

Look to the Episcopal Church Foundation (ECF) and ECF Vital Practices ([ecfvp.org/vrg](http://ecfvp.org/vrg)) for resources, webinars, and workshops related to:

- Collaboration and building vital teams
- Leadership
- Vestry responsibilities
- Vision and planning

Look to The Episcopal Church ([episcopalchurch.org](http://episcopalchurch.org)) for:

- The Canons and Constitution of The Episcopal Church
- Demographic information related to The Episcopal Church

Other resources:

- *Beyond the Baptismal Covenant* by Donald V. Romanik, Forward Movement, 2010.
- *My Church Is Not Dying: Episcopalians in the 21<sup>st</sup> Century* by Greg Garrett, Morehouse Publishing, 2015. ISBN: 9780819229342
- *Transforming Leadership* by Katherine Tyler Scott, Church Publishing, 2010. ISBN-13: 978-0-89869-599-1
- RenewalWorks, a ministry of Forward Movement that focuses on spiritual engagement to revitalize leaders and congregations ([renewalworks.org](http://renewalworks.org))