

## VESTRY TRAINING RESOURCES

### **Introduction**

This resource was created by the Rev. Canon Victoria Duncan as a companion to *The Vestry Resource Guide, 2007* for use in the Diocese of Western New York. The focus is the ministry of the Vestry, including conversation around conflict and stewardship. It was designed in a 4-session format (each session running around an hour) but may be used in different ways, such as a single unit for a one-day retreat or as the beginning of four vestry meetings. The sessions may be used in any order appropriate to particular circumstances.

### **General Guidelines:**

Bible Study – Oral Tradition Bible Study is suggested using different translations and different readers, if possible, each of the three times the passage is read aloud; sharing is always optional.

- Read passage aloud; Share (without elaboration) what word or phrase speaks to you
- Read passage again; Share as above where the passage touches you personally or your vestry/church today
- Read again; Share as above how God is inviting you to change
- Pray around the circle including, if possible, what you have heard shared

Content – Be creative in the delivery of this material. Potential methods include:

- Clergy or warden delivers material by reading and elaborating where appropriate, OR
- Everyone reads material silently and people share points of interest/confusion/etc., OR
- Different vestry member presents different sessions

Discussion Questions – The questions included here are intended to initiate conversation; you may design your own to use instead. This section will probably flow best if someone facilitates the conversation. The facilitator does not need to be either clergy or warden, but should be someone who desires (feels called) to lead this piece.

### **Session Topics:**

- Ministry of the Vestry Defined
- The Meaning of Being on a Vestry
- Conflict
- Stewardship

## Session I: Ministry of the Vestry Defined

### Bible Study Passage

John 21:16-17 (*Feed my Sheep*)

### Content

1. The mission of the Church is to restore people to unity with God and each other in Christ (BCP p. 855).
  - We are called to bear witness to Christ wherever we may be.
  - We are called to use the gifts given to us to carry on Christ's work of reconciliation in the world.
  - We are called to take our places in the life, worship and governance of the Church.
2. The membership of a vestry should reflect the composition of the congregation.
3. The role of a vestry is a sacred one for those called to lead members of the church closer to God.
  - Leadership role: continually seeking the mind of Christ as reflected and manifested in the life of the congregation as a whole.
    - Discerning God's will and vision for the congregation
    - Envisioning strategies to live into this
    - Engaging the congregation in the vision and strategies
    - Generating enthusiasm and determination for the work ahead
    - Modeling the desired values and behaviors
  - Management role: striving to achieve stability, order and efficiency.
    - Budgeting, allocating resources and setting objectives
    - Establishing structures, policies and procedures
    - Hiring, training and supporting staff
    - Maintaining property
    - Monitoring the strategies envisioned in light of the results
4. Clergy and laity serve together in a relationship of trust and interdependence.
  - Joint responsibilities of vestries and clergy include:
    - Articulating the congregation's mission
    - Ensuring effective congregational planning
    - Ensuring adequate resources and effective stewardship
    - After discerning mission, establish and monitor programs and services
    - Communicate with the congregation
    - Communicate about the Church at large
    - Communicate with the wider community
    - Assess the Vestry's ministry

5. Specific responsibilities are defined in our national and diocesan Canons, and in New York State Corporation Law. All vestry members should be familiar with these.
6. For Diocese of Western New York, when a congregation doesn't have a rector the wardens:
  - Function as the communication link with the Diocese
  - Convene and preside at the Vestry meetings
  - Make provisions for Sunday worship
  - Take responsibility for the administration and maintenance of the congregation's properties
  - Act as custodians of the congregation's registers and records

### **Discussion Questions**

1. What skills, attributes, and experience do you bring to vestry service? (Consider your interpersonal style, spiritual gifts, personal strengths and weaknesses, etc.)
2. What is necessary for the clergy-vestry relationship to be characterized by trust? How can you nurture trust on the vestry?
3. What questions do you need answered to feel more comfortable with your role on vestry?

## Session II: The Meaning of Being on a Vestry

### Bible Study Passage

Genesis 3:9 (*Your relationship with God*)

### Content

1. Understand yourself as a spiritual being.
  - Dedicate yourself to grow in discernment (seeking the will of God).
    - Distinguishing the voice of the Holy Spirit from your own
    - Distinguishing authentic from false
    - Distinguishing good from evil
    - Distinguishing the path toward vs. away from God
  - Challenge your own spiritual life.
    - Be aware of the tension between doing the work of the gospel and the demands of sustaining the institutional church
    - Be regular in your worship attendance
    - Pray each day
    - Study Scripture
    - Pray and worship together as Vestry
  - Ask for help when you need it.
2. Leading in a Community of Faith
  - You are called as Vestry to discern the will of God for the congregation.
    - Discernment is easiest and truest when people are in regular dialogue with God.
  - Practice being fully human.
    - Describe honestly how you perceive and experience things
    - Engage honestly with others about their views
    - These conversations will lead the group to God's Truth.
  - Practice healthy communication. A modified version of what the Rev. Eric Law created (acronym "RESPECT") is this:
    - RESPONSIBILITY** – Take responsibility for what you say and feel without blaming others. Use "I" language.
    - EMPATHY** – Listen empathetically, allowing others to complete statements before beginning your own.
    - SENSITIVITY** – Be sensitive to differences in communication styles and to the diversity of the group.
    - PONDER** – Ponder what you hear and feel before speaking; give space for reflection.

**EXAMINE** – Examine your own assumptions and perceptions.

**CONFIDENTIALITY** – Treat information with appropriate confidentiality.

**TOLERANCE** – Tolerate ambiguity; we are not here to debate who is right or wrong.

- If someone experiences a gap or challenge in communication, s/he should name it and request that the flow of conversation pause while the intent of the message-sender and the impact on the message-receiver is discussed. The goal is to clear up any misunderstanding on the spot.
- Embrace differences:
  - Cultural diversity: Never assume you understand someone (or their motivations) who is different from you. Don't assume that one voice speaks for a whole group.
  - Individual life experiences and personality traits
  - Generational differences
- Establish guidelines for working together, such as:
  - Agenda development and deadlines
  - Beginning and ending times
  - Presence at worship
  - Listening without interruptions
  - Confidentiality
  - How disagreements will be handled
  - How to determine if there is agreement
  - How to name and manage issues that aren't open topics but are getting in the way of the work

### **Discussion Questions**

1. The Baptismal Covenant calls you to seek and serve Christ in all persons. How does your vestry model this within vestry meetings? In the congregation?
2. How does your vestry invite the Holy Spirit into your work? How can you make the shift from *Robert's Rules of Order* to discernment as the routine way of making decisions?
3. Follow-through is a critical piece to building trust. How does your vestry track action items to ensure that commitments are kept? Is the tracking process visible to all vestry members? If action items go undone, what is the process for reassessment?

## Session III: Conflict

### Bible Study Passage

Romans 12:2 (*discerning the will of God*)

### Content

1. Conflict is natural.
  - The Episcopal Church believes that struggling with differences of opinion or conviction is healthy.
    - These differences, when handled lovingly and with respect, will help congregations discern God's call.
2. Origins of conflict:
  - Conflict is inevitable because we are different individuals.
  - Church communities are systems, which can be ineffective if not managed.
    - Defensiveness to a perceived insult or injury leads to more conflict.
    - Trying to apply a quick fix rather than entering into the work of a growth process is easier, but usually not healthy.
    - Unwritten rules lead to misunderstandings.
  - Conflict from change.
    - Sources beyond and from within the congregation can initiate conflict.
      - Examples of issues originating beyond the congregation: ordination of women, 1979 Book of Common Prayer, Commended Team ministry and local ordinations, human sexuality
      - Example of contextual changes originating beyond the congregation: demographics of the neighborhood
      - Examples of changes originating within the congregation: influx of children, worship times or styles, changes in lay or ordained staff, biblical/scriptural interpretation, music styles, expectations for lay ministry
  - Conflict from poor communication.
    - When information is not shared with the congregation or when the information shared is incorrect, incomplete or untimely
  - Conflict from leadership style.
    - When the rector, vestry, and congregation have different expectations about leadership and leadership style.

### 3. Managing Conflict.

- We begin with our baptismal promise to respect the dignity of every human being.
- Most conflicts begin small and grow if they are not handled properly.
- Concerns should always be named and addressed; be open and direct.
- People should speak directly to those with whom they are in conflict.
- The level of conflict should be dealt with appropriately. A basic model established by Speed Leas (Alban Institute):
  - Level 1: Problems to Solve (people can stay focused on problem)
    - \* Work through using collaborative problem-solving or negotiation if possible
  - Level 2: Disagreement (parties involved want to protect themselves)
    - \* Reduce tension and facilitate working together; establish ground rules of behavior; request a facilitator if necessary
  - Level 3: Contest (parties involved want to win)
    - \* Request an external consultant from the Diocese or other
  - Level 4: Fight/Flight (parties want to hurt or get rid of the other)
    - \* External consultant necessary; follow Church Canons; communicate through third parties
  - Level 5: Intractable Situations (one party wants to destroy the other)
    - \* Conflict is not manageable; outside authorities will need to make difficult decisions; the parties need to be separated

### **Discussion Questions**

1. What kind of conflicts are in the history of your congregation? How were they dealt with (or not)? Are there issues that still need attention?
2. When has your congregation experienced conflict resulting from external changes? Internal changes? Poor communication? Leadership style? What can you learn from this to handle things more effectively in the future?
3. What issues are facing your vestry at the moment? In terms of Speed Leas' levels of conflict, how would you describe your current issues?

## Session IV: Stewardship

### Bible Study Passage

Matthew 13:3-9 (*The Sower*)

### Content

1. All that we have comes from God.
  - Time, talent, treasure.
  - We give in celebration that we have received in abundance.
  - When we give to the church, we are giving to both our congregation as well as to the place where we gather to do God's work.
  - It is critical that the congregation and its leaders ensure that its resources are treated as God's, and to discern how God would have them used.
2. Responsibilities of the vestry and clergy:
  - Teaching the theology of stewardship, emphasizing time, talent and treasure.
  - Witnessing about your experience of God and Church, and your giving of time, talent and treasure.
  - Managing the monies, property and human resources of the congregation to most fully respond to God's call.
  - Canonical responsibilities are identified in Title 1. Canons 7 and 14.
3. Receiving the gifts of God's people
  - Understanding what has been successful and what has failed will encourage open conversations about financial needs and potential resources
  - Different reasons for giving require different forms of nurturing that desire. These reasons for giving include:
    - a. Emotional connection, relationship, between the giver and God, the congregation, or the leaders of the congregation
    - b. Thanksgiving in response to all God has given
    - c. For the mission of the Church
    - d. Giving back to God a portion of all that is God's
    - e. As an extension of the self; a deep personal identification between giver and congregation
    - f. Reciprocity with a social group; the gift is given out of a sense of obligation
  - A variety of forms of financial giving:
    - a. General operating fund
    - b. Planned giving
    - c. Endowments
    - d. Special events (such as bazaars, meals, auctions, etc.)

4. Management of financial gifts is directed by the Canons of the Episcopal Church
  - Title I. Canon 7, Section 1.
  - This includes provisions for accounting, handling and reporting of funds.
  - The vestry is responsible for ensuring that the resources of the congregation are used wisely; the budget is a reflection of the priorities of the congregation and its intent to live out its mission.
5. Vestry members should understand the various fund types used to manage assets:
  - Unrestricted funds may be used for any purpose designated by the vestry.
  - Reserve funds are set aside by the vestry for specific purposes, but are subject to change by vestry action.
  - Restricted funds are designated by donors for specific purposes.
  - Endowment funds require that the principal is maintained but the income from investing this principal may be used.
  - Savings accounts are often used for special or restricted funds.
  - Discretionary funds are used for “pious and charitable uses”.
6. Stewardship of property, community, staff talent, and volunteers is paramount.
  - Property: vestries oversee maintenance, safety, insurance, use of buildings for free or rent
  - Community: preventing sexual misconduct, establishing alcohol and tobacco policies, and creating an environment free of discrimination
  - Staff talent: insuring adequate salary and benefits, insuring that employees have a clear understanding of their role and of their right to a safe and harassment-free environment
  - Volunteers: ensuring that old members don’t burn out and that new members are welcomed and included

### **Discussion Questions**

1. When you think about stewardship do you predominately think about money? What are your personal and your congregation’s definitions of stewardship?
2. How do you ensure that the compensation and benefits for lay workers are equitable to clergy compensation and benefits, or market rate for a particular job?
3. How recently have you reviewed the congregation’s misconduct policy as it pertains to clergy, staff, and volunteers? Have all appropriate persons received training in the policy? Has it been made public?