

## Vestry Leadership

January-February 2017

### Beginning Your Vestry's Work Together

By Nathan E. Kirkpatrick, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

At the beginning of any new leadership role, you find that there is an existing to-do list. There are pre-existing challenges to be addressed, crises to be managed, opportunities to be pursued. For the new leader, there are both internal and external pressures to get “the work” underway, to show and feel forward momentum on the priorities that made you seek a leadership role in the first place. This is equally true for the collective leadership of a vestry.

#### **Forming a group of leaders**

In every congregation I've ever worked with, the new vestry begins their year of service with a demanding agenda from the first day. There are staffing questions to be cared for, budget matters that need attention, facility issues that simply cannot wait; on top of these, there is the actual ministry of the congregation that needs to be reviewed and, in some cases, renewed or reimagined. The agenda for the first meeting of the vestry can be dauntingly full even before the vestry is chosen.

Consider this a plea to press pause on that agenda – not indefinitely but more than momentarily – to care for the other vital work that must happen at the beginning of the vestry's work together. Invest some time in intentionally forming the vestry as a group of leaders and disciples. Doing so lays a foundation that can pay dividends later in the year when questions get more complicated, stakes get higher, and disagreements may get more intense.

#### **Learning who we are**

The first priority for any new group at the beginning of its work together is that they *get to know one another*. This sounds obvious, and yet, I am surprised by the number of vestries that are still largely strangers to one another months into their work together. Senior leaders, specifically the rector and the wardens, can help facilitate this meeting process by publicly acknowledging the fact that vestry members may be familiar faces to one another but unknown to each other, representing different preferred services and different ministries within the life of the congregation, and then, by helping people get to know one another. For this work, I have found the oft-employed icebreaker the least imaginative and least helpful way of getting to know each other.

Getting to know one another, as I am envisioning it here, depends on getting to know what each person values. This is the place of real human connection; this is the well that you will want to return to later on when the going gets rough. One way to do this in your first gathering is to ask each member of the vestry to introduce themselves and to say what brought them to the parish in the first place and what

made them stay. Stories about finding welcome for personal conviction and room for lingering questions, about the reputation of children’s ministries, about the beauty of music programs or the pageantry of the liturgy all begin to build camaraderie among the new vestry members as folks realize that what I value about this congregation is similar to what you value about it – or, perhaps even better, we build a list of things we value about this congregation that is so extensive that our work can begin with a celebration of who we are.

### **Imagining an ideal vestry**

The second priority for a new leadership group is to *help people learn their role*. A colleague of mine used to say that people want to know what it looks like when they are doing their work “correctly.” Some of your vestry members will be old hats at the work and responsibility of this ministry, but as we have an increasing number of people in our pews who were not raised in the church, the vestry can seem like a mysterious body with secret handshakes and unknown customs. Those who are new can use some help understanding the balance of speaking for self yet serving on behalf of the entire congregation. Rather than leaving it to chance (or worse still, to the most misanthropic of your incumbent vestry members mentoring the new folks into bad behavior), as senior leaders, take some time to talk about what vestry ministry looks like when it is alive, thriving, and effective.

### **Stating expectations**

The third priority in forming a vestry at the beginning of its work together is to *define common expectations*. I often hear clergy and wardens complain about vestry members that they have decided are underperforming or misbehaving. My question in reply is always, “what did you tell them before they were elected?” If expectations are unclear, then we cannot fault the person who is not living up to our imagined but unstated expectations. Early on, define how you will be together. If attendance at vestry meetings is presumed, which I cannot imagine that it wouldn’t be, then state that explicitly. If the expectation of vestry members is that they will make a pledge to the church’s budget, state that clearly, as well. Beyond those two examples also consider what the expectations are for vestry member behavior – how will we treat each other? How will we disagree? How will we make decisions? Clarity around these matters is just as important as clarity around attendance.

One final note, one gift that the vestry’s senior leadership can give is to describe how *vestry service is a way that each person on the vestry answers Christ’s call to discipleship*. Sharing in responsibility for the welfare of the church, which is another way of saying stewarding the life of the congregation, is an act of faith. In the hail of revenue and expense statements, insurance reviews, diocesan askings, and mediation of staff conflict, it can feel otherwise, but the reason we serve on vestry is because Jesus says, “follow me,” and we answered “wherever you lead.” To that end, early on, it is important that we talk about and demonstrate how these years of service can be a spiritually-enriching experience, how they can nurture (or refresh) a life of prayer, how they can awaken hope and confirm faith, how they can incline our hearts to love God and our neighbor in new and deeper ways. Why else would we do this?

Before the pre-existing agenda takes hold of our time and imagination, I plead with you to invest in the gift of one another. Get to know each other. Help people learn their role. Define mutual expectations. And keep before us the persistent and transforming call of God to serve. Then, let’s get to work.

**Nathan E. Kirkpatrick** is the managing director of *Alban at Duke Divinity School* in Durham, N.C. In this role, he designs educational programs, facilitates leadership development opportunities for clergy, denominational and institutional leaders, works with publisher Rowman & Littlefield to publish Alban books, and consults with senior church leaders around the United States and abroad. He has degrees from Wake Forest University and Duke University Divinity School and is a doctoral candidate at the

*University of Durham in Durham, U.K., studying trends and patterns in clergy formation. He was ordained to the Sacred Order of Priests in the Episcopal Church on Dec. 20, 2015, and serves as assistant to the rector at [Church of the Advocate](#) in Chapel Hill, NC.*

## **Resources**

- [Covenant as a Subversive Paradigm](#) by Walter Brueggemann, *Christian Century*, November 12, 1980, pp. 1094-1099
- [Norms & Covenants: Tools to Strengthen Your Team](#) by Nancy Davidge, *Vestry Papers*, January 2016
- [Five Tips for New Leaders](#), an ECF Vital Practices' Vital Post from Kanuga Conference & Retreat Center
- [Getting to Know You Tips for New Groups](#) an ECF Vital Practices' Vital Post from Kanuga Conference & Retreat Center
- [How Does Your Group Grow? Group Developmental Stages](#) an ECF Vital Practices' Vital Post from Kanuga Conference & Retreat Center
- [Tools for Healthy Communities](#) by David Vryhof, SSJE, *Vestry Papers*, May 2015
- [Why Team Building Matters](#) by Leslie Hartley, *Vestry Papers*, January 2016
- [Vestry 101](#), January 12, 2017, an ECF webinar on the basics of vestry leadership and service

## **Lessons From a Senior Warden**

By Anne Rudacille Schmidt, part of the *Vestry Papers* issue on [Vestry Leadership](#) (January 2017)

I became senior warden the same day that our rector announced to the congregation that he was called to another church. This meant that my whole year as senior warden was a period of transition and thus a challenging time. I have come to learn that any term as a warden will contain challenges as well as some great joys. Here are some of my takeaways from my experience.

### **Roles and relationships**

I'll first say that it is important to understand and clarify roles. The rector of a parish is the equivalent of a CEO in the business world. She or he would be in charge of daily operations, staffing and vision. The vestry is like a board of directors, focused on governance, mission and support of the rector as needed. Traditionally the senior warden is chosen by the rector which is why you may have heard it referred to as the "rector's warden". The senior warden is like the chairperson of the board, leading the vestry meetings and being a primary resource/confidant for the rector. The junior warden is usually elected by the vestry and often is the go-to for facilities issues. Increasingly, however, these roles are becoming more collaborative with shared responsibility between the two. It is good practice for the rector and

wardens to meet and discuss roles and expectations at the beginning of the new term. This will help avoid misunderstandings down the line.

### **Focusing and prioritizing responsibilities**

Good communication between the warden and rector will continue to be important throughout the term. One of the primary responsibilities of a vestry is to be a pastoral presence for the rector. Is he taking care of his mental/physical/spiritual health? Is she maintaining a healthy life/work balance? Wardens need to keep tabs on these things and offer support when needed. Also remember that in order for your clergy to be able to confide, you must provide absolute confidentiality. You should never discuss these conversations with anyone, even after your term is complete.

Managing the vestry will be a big part of your job. I decided to have our vestry write a vestry covenant during our first working retreat together. The Episcopal Church Foundation is a great resource for these documents and the key is to come up with norms that all agree to abide by. From being on time, to starting and ending with prayer, these are the behaviors you will live by and hold each other accountable to so that your time together will be both productive and fulfilling.

It is so important that you provide your vestry with the tools to do their job. Your parish should have policies, procedures and other governance documents with which you and your vestry need to be familiar. Remember that each of you are acting as a fiduciary and can be held legally liable for your decisions. Studying and referring to these procedures and guidelines will provide you the proper framework for executing your work properly. The wardens hold an orientation meeting for our incoming vestry members where we give them a notebook containing all of these documents and review other important information such as the budget. Our treasurer makes sure they know how to look at a spreadsheet and what each account listed represents. We find this to be a valuable tradition and gets our leaders off on the right foot.

Often the vestry can feel like it is always reacting to something. Perhaps the air conditioner has gone out or someone wants to initiate a special project that needs approval or something else that needs immediate attention. Our vestry found it helpful to set three goals at the beginning of our year so that we would be able to manage short and long-term strategies. We always began our meetings by looking at our three priorities and making sure we were on target for achieving them. Our goals were to hire an interim rector, to launch the search process and to pay off our debt. The first two were achieved and strategy was formed on the third goal that led to it being achieved by a subsequent vestry. Having these goals allowed us to prioritize all other matters in relationship to how they would help us achieve the three.

### **Communicating well and often**

Communication, communication, communication. I can't stress enough how important this is for a senior warden's work. Information allays anxiety. Our congregation was in transition which is a stressful time for staff and parish members. As a vestry we were extremely intentional about making sure our congregants understood what was happening and why at each stage of the search process. We held town hall meetings, wrote articles for newsletters and were readily available for answering questions. We got in front of any news to keep the rumor mill at bay. We let the staff know what was happening and met often with our interim rector. We worked hard to make sure we framed news in a positive light so that we kept the congregation's energy up and vision set firmly on the future. Even during "normal" times vestries make decisions that should be communicated well and often to their members. This will build trust and help promote buy-in. Encourage your vestry to divide up and make sure someone is at as

many parish events as possible. The visibility will allow people to know you and voice questions and concerns allowing you the feedback you need to make sure you aren't operating in a box.

In summary, here are my top five tips for a rewarding term as senior warden

- Set only three goals for the year and focus on them at each meeting
- Communicate. Do it often and be as transparent as possible
- Establish a vestry covenant and hold your vestry team accountable to it and each other
- Be very familiar with parish governance and policy documents
- Do everything you can to ensure an orderly leadership transition at the end of your term by providing a good orientation to the new vestry leadership

Though my term was challenging I found the experience of being a senior warden rewarding as it deepened both my spirituality and my connection to my fellow parishioners. I got to see the many gifts God has bestowed on my congregation as people often offer their very best. It is hard work but the collaboration between your vestry and rector can be so rewarding. God bless you as you embark on this important ministry.

***Anne Rudacille Schmidt** is a member of the [Episcopal Church of the Transfiguration](#) in Dallas, Texas. She currently works as a search consultant, guiding search committee's through the process of calling a new rector. Anne is co-chair of the CEEP Planning Committee and a board member of Forward Movement. She is married to Walter and has 2 teenagers and enjoys running and yoga in her free time.*

#### Resources

- [Roadmap for Senior Wardens](#) by Demi Prentiss, *Vestry Papers*, January 2014
- [Senior Warden Ministry: Mission Impossible?](#) an ECF webinar led by Anne Schmidt and Christopher S. Ayres, former and current Senior Wardens of the Episcopal Church of the Transfiguration, Dallas, TX
- [You're a New Warden: Now what?](#) by Donald Romanik, *Vestry Papers*, January 2009
- [Wardens as Stewards: A Call for Excellence](#) by William Herrman, former Senior Warden at the Church of the Heavenly Rest, New York, NY
- [Vestry Covenants and Norms](#), includes examples of norms and covenants from various Episcopal congregations
- [Vestry Resource Guide](#), an ECF publication on vestry service and leadership (Forward Movement, 2015)

## Vestry Meditations

By Colleen McMahon, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

### *Editor's Note:*

*In her book [Meditations for Vestry Members](#), Colleen McMahon delves into the challenges and joys of vestry life and provides spiritual and emotional support for vestry members. Her writing draws deeply from personal experience - Colleen had resigned from her congregation's vestry, rather than service out her second term due to exhaustion, concluding that being on the vestry was interfering with her growth in God.*

*Years later however, she was able to reflect and see that, despite the pitfalls, there was much joy to serving on the vestry. Her book offers meditations centered around five themes: the call to service, the job to be done, getting along with each other and the rest of the parish, the importance of prayer, and life after you leave the vestry.*

*In the following meditation from her book, Colleen shares the importance of prayer and spiritual practice. She warns about falling victim to the "Martha syndrome" - being consumed by the many worldly tasks vestry service presents, and in the process losing sight of what is most important - our relationship with God.*

### **Martha, Martha, you are troubled by many things**

*Luke 10:38-42*

For most folks, going to church offers a respite from the cares of the world - a quiet place where they can breathe a little more slowly, think a little more clearly, and pray a little more reverently. They come in once a week, say hello to the usher who hands them a bulletin, take a seat, close their eyes, cross themselves, and wait for the familiar beauty of the liturgy to waft them heavenward, lost in wonder, love, and praise. They make mental comments on the sermon and the anthem, feed on bread, wine, coffee, and donuts, catch up on a little local gossip, and head home after picking up the kids at church school. So what if the plaster in the parish office is falling over the secretary's new computer, pledges are down, and no one will volunteer for the hospitality committee. That's someone else's problem.

You, of course, know whose problem these things are - yours. You won't be in office long before every visit to the premises takes on the trappings of a business trip. You can't look up without seeing the wet spot on the ceiling, and you can't hear the music without remembering that the organist said something about needing new leather on the pistons, whatever that means. And when there's nothing else to take your attention off the Lord, rest assured that Mrs. Jones will grab your elbow to complain about what you have done and to remind you of what you have left undone.

You are Martha reincarnate, with ample reason to complain to Jesus about all those Marys out there in the pews. It's your hard work and worry that allows them to worship in bliss, isn't it? And he has the temerity to tell you that *they* have chosen the better part? Really!

Martha is a much misunderstood figure. Her problem is not that she has a job to do and does it - after all, if she did not, no one in her house would have food to eat or clean clothes to wear. Martha's problem is that she gets so carried away by her work that she can't see the obvious, which is that *the Lord has dropped in for a visit*. She's gotten so bogged down in her job that she becomes unable to set it

aside for a few minutes, as Mary can, to receive the simple, beautiful grace of God's presence in her house.

Vestry members carry a lot of responsibility on their shoulders. Therefore, you are in danger of falling victim to the Martha syndrome. Remind yourselves that where God is concerned the first order of business is cultivating that relationship. Prayer is more important than fixing the roof or paying the bills. That's not to minimize the importance of the vestry's special calling; you will appreciate why it is so important: Doing it glorifies God. And you are less likely to burn out before your tasks are complete.

The great abbot St. Benedict made this truth the cornerstone of his monastic rule, which is still followed by many monks, nuns, and laypersons today. Benedict recognized the importance of work in the quest for spiritual perfection. At the same time, however, he insisted that physical or mental work be interrupted periodically for the more important work of prayer – which put God at the center of everything.

So when you come into your church – not just on Sunday morning, but every single time, and especially when you are about to tackle the holy work of the vestry – take a moment with Jesus to refresh yourself. After all, he was very clear: Mary, not Martha, chose the better part. Don't make the same mistake.

***Colleen McMahon** is a judge in the New York State Court System and is active in her parish and diocese. She writes regularly for the Episcopal New Yorker and served on the vestry at her home parish, Christ Church.*

## Resources

- [Meditations for Vestry Members](#) by Colleen McMahon (Morehouse Publishing, 1999)
- [Models for Vestry Leadership of Faith Formation](#), an ECF webinar led by Lisa Kimball and Kyle Oliver, Center for the Ministry of Teaching, Virginia Theological Seminary
- [Vestry Discernment Process](#) by Janie Kirt Morris, a resource to help create a prayerful process for raising up healthy, faithful leaders for the congregation
- [The Lord Broke Through](#) by Richard H. Schmidt, *Vestry Papers*, November 2007
- [A Blueprint for Change](#) by Birdie Blake-Reid as told to Nancy Davidge, *Vestry Papers*, March 2014
- [Forward Day by Day](#), free daily meditations by Forward Movement
- [Brother, Give us a Word](#), free daily meditations by the Society of Saint John the Evangelist (SSJE)
- [Getting to Know the Daily Office](#) by Linda Buskirk, ECF Vital Practices blog post
- [Daily Invitation](#) by Anne Ditzler, ECF Vital Practices blog post

## Spiritual Gifts

By Jennifer LeBlanc, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

### “Now Concerning Spiritual Gifts...”

When St. Paul writes his first letter to the Church in Corinth, he’s writing to a group of relatively new Christians who are growing deeper in faith while also seeing their community grow in both numbers and impact. It’s a letter full of practical instruction about growing our relationship with Christ, and one section begins this way: “Now concerning spiritual gifts, brothers, I do not want you to be uninformed” (1 Corinthians 12:1).

In 2016, Church of the Incarnation in Dallas, Texas, conducted a parish-wide survey to help identify areas of needed growth and development among its parishioners. One of the most prominent needs focused on a desire to know exactly where and how they should be serving *at* and *through* the church.

The objective was to provide an opportunity for the congregation to better understand what all of the spiritual gifts are and how God intends them to function in the body of Christ because we are commanded to be aware of them ([1 Cor 12:1](#)); we are expected to use them ([1 Timothy 4:14](#)); and we will be held accountable for the use of them ([1 Peter 4:10](#)). The fact was, many in our congregation weren’t fully informed of their [spiritual gifts](#). The prayer was for that reality to change.

As one may imagine, there is an endless list of printed and digital spiritual gift surveys available in the marketplace. After significant research, the leadership team at Incarnation decided it was best to create its own version, pulling excerpts from existing options while fine-tuning text to be in line with the Anglican tradition.

There is often a correlation between Christian experiences and spiritual gifts. This assessment explored personal experiences that might indicate which spiritual gifts someone was most and least likely to have. It helped define their “spiritual job description” as it related to God’s call on their lives.

Each respondent was to:

- Answer according to who they are, not who they would like to be
- Determine how true of them the statements are
- Rely on their experience
- Decide to what degree the statements reflect their tendencies

Incarnation tested and described 17 major gifts through this test. The leadership team excluded prophecy, tongues, interpretation, and miracles, primarily because these are difficult to test for and are often self-evident within the context of the local church body. Much of the intellectual property belongs to [Bruce Bugbee](#), author and consultant most known for his work as Pastoral Care Director and leader of the Network Ministry at Willow Creek Community Church.

Incarnation decided to exclude a “sometimes” option when answering questions within the survey. We wanted to push people to really think about who they are most of the time - not who they would like to be or how they can be – some of the time.



Like most churches, there are many ways to serve *in* and *through* Church of the Incarnation. Parishioners were given a personalized spiritual gifts assessment packet that not only revealed their top three spiritual gifts but also equipped them with specific service opportunities in direct correlation to their gifts for them to pray about and consider doing.

The packet also included a list of all the gifts that were tested for with corresponding scripture as well as customized prayers specifically for them to use when working through their results. We also held a special commissioning for all who took the assessment during each morning worship service on the Sunday the packets were distributed. Whether they were getting involved for the first time or had been faithfully serving for years, we wanted to pray with and for them as they clarified God's calling on their lives.

Even though the survey was conducted digitally, we chose to distribute the results in person at church on a specified date. While there was some risk in not giving them immediate results, it did not prove to be a deterrent to participation. In fact, we exceeded our goal by 40%. The main reason we chose to control the distribution of results was so that we, too, had a copy of their top three gifts.

Most of the online gift assessments available share the results exclusively with the respondent. Our purpose in conducting this survey was to help shepherd our folks *when* they received the results, not after, especially since we would have been solely dependent on them to come to us.

It has allowed us to take a snapshot of the giftedness of our people (which we have tracked in our database) and ultimately created a working lists of teachers, evangelists, administrators, and the like while also identifying the next group of lay leaders to strengthen and grow the church and its programs. And perhaps most importantly, we now use the assessment as a follow-up to all new members. Within the first week of joining, we issue the survey to ensure they have a framework for getting connected and getting involved.

The Church has an urgent mission in this world, and the only way we fulfill that mission to the level we need to is through each of us using our God given gifts to the fullest. In other words, we can't do it without each other. That's what Paul was telling that fledging church in Corinth, and that's what he—and God—are calling you and me to realize in our own lives.

*Jennifer LeBlanc is the former Publisher of D Magazine and currently serves as the Executive Director of Community Relations overseeing communication strategy, welcome and assimilation ministries, and development for Church of the Incarnation in Dallas, Texas.*

#### **Resources**

- Church of the Incarnation "[Find Your Place](#)" spiritual gifts assessment webpage
- [Church of the Incarnation](#), Dallas, TX website

*Campaign materials from Church of the Incarnation, Dallas, TX:*

- [Letter to congregation](#) announcing spiritual gifts assessment
- [Identify Your God-Given Gifts](#), a booklet outlining different types of spiritual gifts identified in survey

- [Service Opportunities 2016-2017](#), handout to assist survey participants to get connected with opportunities in the congregation
- [Bulletin announcement sample](#)
- [Promotional poster sample](#)
- [e-News announcement example 1](#)
- [e-News announcement example 2](#)
- [Spiritual Gifts Survey email example](#)
- [Spiritual Gifts Survey email - last chance to take the survey example](#)

### Other Resources

- [Increasing Spiritual Vitality: RenewalWorks](#), a tool and resource to help assess and grow spiritual vitality
- [One Step Out of "Stuckness"](#) by Jamie Coats, *Vestry Papers*, September 2011
- [Ongoing Discernment: The Way of Jesus](#) by Blair Pogue, *Vestry Papers*, January 2014

### The Vestry Goes on Retreat

By Nathan E. Kirkpatrick, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

The vestry retreat is coming and so much is at stake in those few hours that have been carved into busy schedules to talk in an intentional and focused way about the business of the church. For weeks, in meetings and in hallways, clergy and vestry members alike have been saying, “well, we’ll talk about it at the vestry retreat,” and now the agenda for the retreat has ballooned into something unmanageable. It’s a common problem.

### Less is more

In educational program design work, which is a significant part of my responsibility at Duke Divinity School, we often say that the first rule of design is *less is more*. A day with four sessions will often prove more beneficial, formationally-speaking, than a day with twice that many sessions lasting twice as long, regardless of how good those sessions are. When there is space to breathe, people show up in a different, more life-giving, way. They find the room to absorb content and integrate it into their daily lives.

The same is true for a vestry retreat: Less is more.

So, my suggestion is that, in a vestry meeting prior to the retreat, you spend some time discussing everything that *could* be discussed at the vestry retreat and collectively decide the top two or three

priorities for the retreat. The question for discernment here is: of all that could be discussed during the time, *what is most important for the life and health of the congregation at this particular time in its history?* While there may be additional smaller matters that can be cared for around the edges of the retreat, you will want the majority of the retreat's time to focus on these large and specific topics that deserve two or more hours of consideration each.

### **An outside voice**

Depending upon what the vestry chooses as its top priorities for the retreat time, it may be necessary or advisable to engage an outside facilitator to lead your retreat. If the priorities identified are particularly complex, controversial, or if "sides" have already formed in regard to the questions at hand, then it is generally helpful to engage an outside voice to carry the responsibility for the retreat. Outside facilitators can design an arc of retreat so that, if or when conflict arises, it does so in generative ways for the future of the congregation. Additionally, a good outside facilitator will prompt a vestry to wrestle with the difficult questions that they would prefer not to engage. An outside facilitator can also often provide content that can shape conversation and imagination for future work.

Outside facilitators, though, often cost a considerable amount, and so, the leadership of your vestry may decide not to engage a facilitator. If you choose not to, here are a few observations from my experience of leading vestries that can help you make the most of the investment of time, money, and energy that is a retreat.

### **Balance, timing and relationships**

First, I have learned from work with the [Center for Courage & Renewal](http://www.ecfvp.org) that, to make a vestry retreat a most generative time, it must be a *safe and charged space*. In other words, the retreat must balance my personal feeling that I can say what I need to say about the status and health of the church and the issues before it *with* my feeling of discomfort at being pushed by the opinions and ideas of others. When this balance is struck properly, people find that they are asked to engage meaningful, not mundane, questions, and the retreat time proves worthy of the investment of *my* time.

Second, attention needs to be paid to what might be called the *arc of a retreat*. How, in what order, and for how much time, should topics be addressed? As you think about the retreat, can you sense a logical flow to the agenda so that topics come at the times that are most beneficial for the discussion that will follow? There are a variety of "logics" that can be employed during a retreat. My personal favorite is to build the retreat this way: a survey of the past year for the congregation set against deeper trends in the congregation's life, followed by a deep exploration of the current conditions of the congregation, ending with a lengthy conversation about the future of the congregation in the year and years ahead. Another possible flow is to consider which issues will generate the most lively – or divisive – conversation and schedule those discussions for the middle of the retreat with the most time, so that the simpler matters are cared for at the beginning and the end. This allows for early consensus and a closing consensus thus sustaining relationships that may be pushed or strained during tense discussion.

Third, my goal for any vestry retreat is that *every member of the vestry has been able to say what he or she needs to say and feels that he or she has been heard*. This is a different goal than the usual "we'll write a strategic plan" or "we'll design the capital campaign," but this goal is a forward-looking one that sees the real point of a vestry retreat as building the relationships necessary for future collaborative work by investing every member of the vestry in a common vision of the future.

Finally, a good vestry retreat, frankly, is one that doesn't feel like a one-day or two-day vestry meeting. If the retreat leaves people feeling that way, a good opportunity for a constructive time has been squandered. To prevent that, it's necessary that the agenda isn't just business but more expansive to *include time for spiritual development, personal renewal, and team-building*. Those elements are not ancillary to the point of the retreat; in any design, they should be at the heart of the retreat time. That is the work that ninety minutes on a Tuesday night once a month often precludes, and it is work worth doing.

Vestry retreats are considerable investments – of time, of money, of energy. Plan the retreat so that the return on those investments will be months of constructive, collaborative effort for the sake of the very witness of the congregation in the world.

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## Resources

- [“Making the Most of Your Vestry Retreat”](#) an ECF webinar led by Nathan Kirkpatrick
- ["Bootstrap your vestry retreat"](#) by Loren Mead, Vestry Papers, November 2009
- [“Come Away and Rest Awhile”](#) by James Koester, SSJE and R. Casey Shobe, Vestry Papers, January 2016
- [Episcopal Camps and Conference Centers](#), includes a directory of locations listed by [state](#) and by [diocese](#)
- ["Create a holy time away for your vestry"](#) by Randy Ferebee and Alan Akridge, Vestry Papers, November 2009
- ["Dots, Eventually"](#) (a group exercise to determine priorities for the months ahead) by Linda Buskirk, ECF Vital Practices blog post
- [Getting to Know You Tips for New Groups](#) an ECF Vital Practices' Vital Post from Kanuga Conference & Retreat Center
- [How Does Your Group Grow? Group Developmental Stages](#) an ECF Vital Practices' Vital Post from Kanuga Conference & Retreat Center
- [“Value One Another \(Vestry Retreat\)”](#) by Linda Buskirk, ECF Vital Practices blog post

- ["A Vision for Your Vestry Retreat"](#) by Linda Buskirk, ECF Vital Practices blog post

## New Leadership for a Changing Church

By Donald V. Romanik, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

We all have seen the numbers and they are sobering. Active membership throughout the domestic Episcopal Church declined by 2.1% from 2014 to 2015 with a 19% drop over a ten-year period. Even more alarming, Average Sunday Worship Attendance (ASA) declined 3.4% in one year and 26% over the past decade. Some say that the Episcopal Church is in a death spiral and that unless circumstances change dramatically we will eventually cease to exist. Others argue that it's not about numbers and that the vitality of the Church should be based on mission and not membership or worship attendance. Both points of view are valid. If the mission of the Church, according to the Book of Common Prayer, is to restore all people to God and each other in Christ, we do need a critical mass of faithful and active Episcopalians to carry on this important work of discipleship.

What does this mean for church leaders? Whether your membership and ASA is up or down, vestries need to act now and make sound decisions about their future. This means being open to change, adapting to new environments and most importantly, engaging in conversations about how to not just survive but be useful and thrive. Where will your congregation be in the Episcopal Church of the future?

### **Changing trends and what they reveal**

While numbers are important, trends are much more significant because they give us important clues about what we need to do now in order to ensure the Church of the future. One key trend is the decline in the percentage of U.S. adults who describe themselves as Christian and the jump in the percentage of Americans who are religiously unaffiliated – categorizing themselves as atheist, agnostic or nothing in particular. How can the Episcopal Church reach out to this critical category known as “nones”? There are also internal trends worth noting, including a growing number of congregations with part-time, bi-vocational or non-stipendiary clergy. Only 55% of priests in the domestic church are classified as serving full-time in one church. Clergy formation and training are also changing with more individuals choosing alternatives to the traditional three-year residential seminary. Demographic trends indicate an increasingly aging white membership with glimmers of growth in the Latino and Asian-American communities. Finally, dioceses and parishes of some of our most beloved and historic Episcopal institutions continue to face financial challenges that threaten their viability and sustainability.

So what does this mean for the Episcopal Church of the future? In short, we need to realistically address these numbers and trends and focus on mission and discipleship with clarity and consistency – a strategy that can lead to stabilization if not growth. We need to create innovative and flexible systems and structures that will help us transition to a very different church in a very different world. We need to maintain the rich traditions of the Anglican/Episcopal Church while addressing the spiritual longing and the sacramental needs of a very different constituency. And drawing on the leadership of Presiding Bishop Michael Curry, we need to operationalize what it means to be the Episcopal branch of the Jesus Movement.

### **An Episcopal Church reborn**

I firmly believe that the Episcopal Church is not going to die because we provide a profound, unique and much needed expression of Christianity in a deeply fragmented and broken world. I also believe that our

incarnational theology and our inherent spirit of resilience will enable us to face the challenges of what it means to be church with confidence and grace. That being said, the Episcopal Church of the future will look very different than what we experience today. With God's help, we can create a mission-focused and Christ-centered network that is nimble, contextual, relevant and responsive. And while it will be smaller, the impact of this new Episcopal Church may be even greater. On the other hand, if we dismiss the numbers, ignore the trends and conduct business as usual, the Episcopal Church is doomed for extinction or, even worse, irrelevance.

This new model of the Episcopal Church is not going to happen on its own. It will require committed lay and clergy leaders working together to bring about this necessary process of transformation and renewal. And it begins with the vestry - that group of elected representatives of the congregation who, in partnership with the rector or priest-in-charge, is responsible for the missional, spiritual, strategic and fiduciary aspects of our local faith communities. We need to ensure that through thoughtful and prayerful discernment, we identify potential vestry members who have the vision, courage and capacity to lead our congregations through a period of significant transition and change. We also need collaborative clergy leaders who have the ability to inspire, empower and partner with their vestries to confront and embrace these changing circumstances. It is this team – clergy and lay leaders, that need to make difficult decisions at this present time to ensure that the Episcopal Church remains relevant and inspiring in the days to come.

### **Looking to the future**

With effective leadership teams in place, especially at the congregational level, here are some of my hopes for the Episcopal Church of the future:

- The Episcopal Church will actively empower our constituents to become disciples, make disciples, and engage in God's mission in the world. We will also embrace the growing diversity of the country and enhance our commitment to social justice. This means that congregational leaders will have to engage in the ongoing process of visioning and planning – to discern who they are and what God is calling them to do.
- There will be fewer but better-resourced traditional parishes (i.e., a building with a full time priest). These congregations will be structured to support a variety of smaller faith communities including groups that meet in homes, pubs and other places or who are involved in specific ministries or activities such as feeding programs or school-based supports. These Episcopal and sometimes ecumenical networks will be facilitated by a collaborative leadership team of both lay and clergy, paid and volunteer professionals with expertise in various areas including worship, Christian formation, pastoral care outreach and administration. While historic and architecturally significant buildings may be restored and maintained, most church properties will be flexible, multi-purposed spaces serving a wide variety of community needs.
- Dioceses will be restructured and reorganized for maximum scope and efficiency using evolving technology to connect - with local constituencies. While we will still have bishops, they will be fewer in number with clearly delineated roles as chief pastors and spiritual leaders rather than administrators and disciplinarians. These other tasks will be delegated to people with specialized expertise in these areas. The process for allocating financial and human resources at both the diocesan and congregational levels will be based on measurable impacts and not just filling holes in the budget.

- The Episcopal Church will be in “full communion” with many more denominations and will utilize these ecumenical partnerships for enhanced mission opportunities and shared resources.
- Our current governance structures will be streamlined to meet the missional, strategic and financial needs of this new model of church. The new generation of stewards and philanthropists will support impactful programs but not bureaucracies or overhead expenses that are perceived to be unnecessary or duplicative. But, we must begin now – by committing ourselves at all levels of the Church to grow, revitalize, engage in mission, adapt to change and prepare for the future. Now is the time to recruit, train and empower new leaders who will motivate excellence and inspire extraordinary outcomes. Our greatest enemy is inertia. We need a sense of urgency. There is a lot of work to do and we are running out of time. The future is now. Let us embrace it with faith, hope, and joy.

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*An earlier version of this article, [Is the Episcopal Church Destined for Extinction?](#), originally appeared in the [Fall 2016 issue](#) of *The Episcopal New Yorker*.*

## Resources

- [Episcopal Church Domestic Fast Facts 2015](#), The Episcopal Church Office of Research
- [Statistical Data on Episcopal Congregations](#), a primer on an Episcopal Church resource
- [New FACTs on Episcopal Church Growth and Decline](#), a look at the dynamics of growth and decline in Episcopal congregations published by the Episcopal Church Office of Research
- ["Equal Partners"](#) by Donald Romanik, Vestry Papers, July 2013
- ["Why Vital Teams?"](#) by Miguel Escobar, Vestry Papers, March 2014

## Discernment in the Vestry Process

By Bruce A. Freeman, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

“I’ll call around to see if we can get someone to be on vestry”.

If you haven’t heard this said in your parish or mission, you’ve certainly thought it if you are in the leadership of your congregation. This sentence reflects the institutional need for succession in your leadership. It also speaks, unfortunately, to the increasing exhaustion in our understanding of congregational leadership. We have forgotten why people are called into the service of leadership in our faith communities and what their purpose is within the life of a parish or mission. The simple answer is: individuals are called by God to leadership and to carrying out the mission of the congregation as God’s leaders.

## **Discerning new leaders**

As a young priest in Western Massachusetts, I was introduced to the practice of discernment as the primary method of choosing leadership in a local congregation. The Rev. Gordon Scruton, soon to be Bishop of Western Mass., coached me to approach leadership succession with a spiritual eye. It was his belief that God was calling every baptized Christian to a godly vocation both within and without the Church. In addition, he modeled for me the truth that the best way to perceive what our godly vocations are and to live into them, was to have each person discern within an accountable and listening community.

This approach found its way into the next cycle of nominations for vestry and wardens in my small parish. A group of leaders, principally the outgoing vestry members and wardens sat together to discern, with disciplined prayer and conversation, the members of our congregation who we felt might have a call to congregational leadership. There were far more people called than there were positions on the vestry. However, all of those who were discerned as having a call were gathered for a day of discussions, prayer, and mutual support. Open conversations about call, talents, dreams and passion for our congregation were shared. There was even disagreement and a bit of disappointment. At the end of the day though, we left our session with excited nominees for warden and the available vestry spots, a number of people who discerned new calls within the parish, and a general sense that God had moved within the walls of what had become a sacred space.

## **Choosing the right person for the job**

Truth be told, I'm not sure that in the 25 years of parish ministry since then I've ever experienced such clear discernment in the leadership development processes within my parishes. However, I have used several of the techniques that were used on that day to seek God's spiritual discernment in subsequent nomination processes. In my previous parish, a corporate size church, we were struggling with finding, within a sprawling community, those who weren't just the "same old" folks for parish leadership. With the help of a visionary set of wardens, we set up a robust "Discernment Committee". This group would meet in an ongoing basis not just in the run-up to the annual meeting, but also to carry the task of discernment to all parish leadership. To be sure, the Committee met much more often in the fall to discern vestry and wardens. The learning I received from this effort was that the parish leadership succeeded in succession planning by taking it seriously, and placing the resources necessary to provide deep discernment in the hands of the "discerners".

To that end, a strong Chair, who was not a past or current vestry member was called upon. He was known as someone who had deep spiritual commitment, was adept at the process, and agreed that a central need of our parish was to seek out people who were beyond the usual suspects to serve in leadership. The make-up of the Committee was a mix of outgoing vestry members and members of the broader community with knowledge of the many ministries in the parish. The Discernment sessions, held for an hour or so between the Sunday services, focused on a balance of prayer and conversation. Grids were used to correlate outgoing vestry members' gifts and ministries, with a potential new members' call. The remarkable thing, from my point of view, was that when it came time to call potential new leaders, there were very few who turned down the call. This speaks to the thoroughness of the Discernment Committee and their attention to the spiritual call at the heart of parish/mission leadership. Lastly, the performance of our vestries was exceptional. These were leaders who felt a deep call to spiritual leadership in our community and who believed that they were doing God's work in the context of our congregation.



Every congregation will and must approach the discernment of its leadership in a different way. The central task of discernment however, is the same in every congregation- we must be faithful in seeking and commissioning God's leaders as a visible sign of our shared call to transform the world in God's Name.

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## Resources

- ["Build a Healthy Vestry"](#) by Janie Kirt Morris, Vestry Papers, January 2013
- [Vestry Discernment Process](#), a collection including a sample timeline, discernment letter, criterion and expectations
- ["That Other Trinity: Results, Process, Relationships"](#) by Miguel Escobar, ECF Vital Practices blog post
- [Sample Vestry Job Description](#), shares examples from several Episcopal congregations
- [Framework for Vestry Success](#), copy of a presentation on creating successful vestries and committees
- [Creating Strong Teams](#), an ECF webinar led by Ella Auchincloss of the Leadership Development Initiative
- [Identifying and Recruiting New Leaders](#), an ECF webinar led by Ella Auchincloss of the Leadership Development Initiative

Trust the Process

By Jade Mohorko Ortiz, part of the Vestry Papers issue on [Vestry Leadership](#) (January 2017)

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

I grew up in the Foursquare Church, an evangelical Pentecostal denomination. My dad is a pastor and my earliest memories include helping my dad minister to marginalized people who were homeless and in need of rehabilitation. My dad ran a sort of halfway home and used Christian military-style rehabilitation techniques to help people who needed him the most. The leadership in my dad's church was basically him, alone. He would make all the decisions although I remember, over time, that he would include my mom and me in the administration of the Church. He never got paid, but did have to keep careful financial records to send to our denomination. He always had to have other side jobs to be able to make ends meet, but we always had food on the table, even if it was just arroz con gandules (rice and beans).

## Coming Home

I started going to the Episcopal Church because my dad and Anthony Guillén, rector at the time of All Saint's in Oxnard, CA knew each other from their community ministerial work. Anthony knew that my

dad was a musician and had a praise band, and wanted to liven up the music during the English service. He invited us to come over to sing once, but very soon it became a regular thing. People were receptive to the music and we started attending services regularly. After a while, we stopped playing and my dad and siblings stopped attending, but something kept me at All Saints. I continued attending the Sunday service and one day Anthony asked me why I wasn't taking communion. I told him that I was not sure what communion meant in the Episcopal Church. In response, he asked me what it meant to me and said that I thought it was the representation of Christ's body and blood. He said that was exactly what it was and it could mean anything I wanted it to in my life. My previous experience with communion was firstly, taking it once a year in my Foursquare church at Easter and secondly, feeling hurt for not being able to receive it in my aunt's Roman Catholic church even though I really wanted to. I decided I would take Communion the next time I was at church. Anthony said that he saw a tear rolling down my cheek when I took communion and he said, "Welcome home!"

### **The Value of Lay Leadership**

One of the things I admired the most about the Episcopal Church was that there was order. There were steps to take, rules to follow, and although it was sometimes uncomfortable, I knew I had to trust the process. I realized one of the reasons I loved the Episcopal Church so much was that there wasn't just one person in charge. I did not know it at the time but there was a vestry that helped Father Anthony make the decisions and he was not the only one in charge. In my other experience, people helped out and would give ideas, but my dad's was the final word. In the Episcopal Church, I saw that the vestry had the final say. I took some informal classes with Anthony and later understood they were confirmation classes. I learned a lot about the church through this process.

A turning point for me was the first annual meeting I attended. I saw that everyone on the vestry had a job. The people on the vestry wanted the best for their church and they were selected by the congregation. I saw a democracy because we were able to vote for the people who would represent us. It became clear to me that even if all the members of the vestry had different points of view, they could still work together for the good of the church. To me, this democracy held people accountable because they were being chosen by the people in the church. After the annual meeting, I became a lot more involved in the church. I even met my husband, Victor, in the Spanish service!

At one point, the vestry and Father Anthony felt it would be good to start a youth group so they invited all the youth, including me and Victor, to be part of a committee to discuss ways forward. The group came up with a lot of ideas but it was slightly frustrating because we had to wait for the vestry to approve them. I was so used to a one-person leadership style where things got done quickly but I realized it was a good system to have several voices even if it took longer to make a decision.

### **A Place for Everyone**

Soon after, I left the congregation and moved away from California for seven years. When I returned, I witnessed some major changes. When I had first started attending All Saints, the Latino-Hispanic ministry was new and had introduced many changes, including adding the image of la Virgen de Guadalupe to the church sanctuary. This made the English-speaking congregation a bit nervous and this was manifested in the vestry. There were only a couple of Spanish speakers on the vestry at the time and they felt intimidated by the language and by some of the members. Anthony was very intentional about educating the Spanish speakers in all Episcopal Church matters. He also made them comfortable by providing everything in both languages.

Now that I have been back at All Saints for four years, I can see that there is fair representation on the vestry. The Spanish speakers feel they can speak up and know exactly how the vestry works. There are

still differences (for instance, English speakers tend to want to follow the rules accurately while Spanish speakers want to follow the rules but also adjust them to better suit their lived experience), but because we have a process and order, everyone can be heard and work together for the good of the entire church.

There are three suggestions I would give vestries, especially those in churches that are multicultural and multilingual:

1. Remember why you wanted to serve in the vestry. It is not only your church, but everyone's church and we are all there to serve Christ.
2. Recognize differences and learn from them. Learn to accept and respect the differences in the cultures and the people in the vestry, and communicate often.
3. Think about the future. The decisions you make now affect us all in the future. There has to be change in order to grow. Tradition is beautiful and it is what first attracted me to the Episcopal Church, but our mission is what keeps me here.

I am grateful to God that my dad is an active pastor who taught me to help in any way I can.

I am grateful I met Anthony through my dad and was introduced to the Episcopal Church.

I am grateful that I am still learning to trust the process.

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## Resources

- ["Episcopal and Baptist Governance"](#) by David Perkins, Vestry Papers, May 2012
- ["From Above or Below?"](#) by Alberto Cutié, Vestry Papers, May 2012
- ["Lift Every Voice"](#) by Anna Olson, Vestry Papers, January 2015
- ["Multilingual Leadership and Multicultural Churches"](#) by Sandra Montes, Vestry Papers, July 2015
- ["Conflict: Is Everyone Being Heard?"](#) by Anna Olson, Vestry Papers, March 2016
- [The Constituency Model](#), a tool to map or demonstrate the levels of connection in a congregation or organization
- ["Connectedness and Stewardship"](#) by Sarah Townsend, an ECF Vital Practices blog post
- ["Who's Responsible for What?"](#) by Melanie Barnett Wright, an ECF Vital Practices blog post