

## Three Questions for Participants

### How long have you been on the vestry?

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



### What is your role on the vestry?

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

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

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

## Technical Notes

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



# Vestry Orientation

January 14, 2016

Miguel Escobar and Brendon Hunter  
Leadership Resources



## The Episcopal Church Foundation (ECF)

Independent, lay led organization, founded in 1949



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

Through our programs, ECF is building a Church...

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



## Presenters



Miguel Escobar  
Managing Program Director  
[mescobar@episcopalfoundation.org](mailto:mescobar@episcopalfoundation.org)

Brendon Hunter  
Associate Program Director  
[bhunter@episcopalfoundation.org](mailto:bhunter@episcopalfoundation.org)



## Opening prayer

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

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



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

*- Prayer attributed to Sir Francis Drake*



## Presentation overview



The role of the vestry



Key vestry responsibilities



Tools and resources for new vestry leaders



Potential next steps

## The role of the vestry

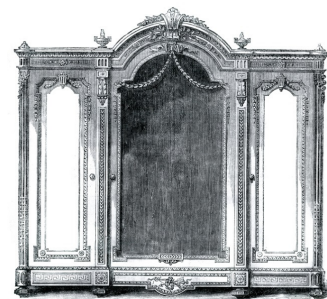
### A bit of history

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

### The average vestry today

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

### But what do vestries do?



# The role of the vestry

## Discernment

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

## Mission and Vision

- Helps articulate the mission and vision of the congregation

## New Leaders

- Identifies new leaders for the congregation and wider Church

## Stewards Resources

- Manages resources and finances of congregation

# The role of the vestry

## What the Canons say...

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

*Vestry Resource Guide, page 9*



# The role today's vestry

## 1. Change

- Lack of change and resistance to change
- Managing the change that comes from starting healthier practices

## 2. Communications

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

## 3. Stewardship

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

## 4. Vestry Leadership

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

## 5. Vision and Planning

- Difficulty of creating a congregational vision - that is, one shared by all, with input from all
- Difficulty of planning for the future when overwhelmed with immediate needs
- Need for a plan to get congregations through the next few "rough" years

*Summary of data from ECF surveys from 2011-2013*

# The role today's vestry

## Discerning God's direction amidst many changes, including:

- Fluidity in choices of faith - more than one-quarter of Americans changed religions or opted for none
- Rise of "Nones," where 1-in-4 young Americans not affiliated with a religion
- Decreasing size of mainline Protestantism - becoming a minority Protestant country
- Decline in Episcopal Church membership and aging population (Average Sunday Attendance is 61 people)
- Increased reliance on and necessity for effective lay leaders at the congregational and diocesan levels, more small congregations with part-time clergy
- Diminished financial resources, inability to afford existing buildings
- Increase in Latino and other ethnic or multi-cultural congregations and members
- Significant generational differences in giving patterns and commitment to stewardship, but some overall increase in pledge/plate giving
- Emerging church initiatives, non-traditional models and new, more pro-active bishops





# Key vestry responsibilities

## Discerning God's mission and vision for the congregation

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

## Defining 'mission' and 'vision'

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



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

# Key vestry responsibilities

## Identifying new leadership

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

## Vestry nomination and election processes

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

## What the church can learn from community organizing

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



# Key vestry responsibilities

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

## **Fiduciary**

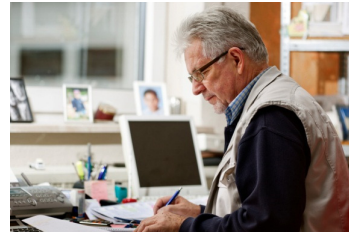
- Ensuring proper asset and financial management and oversight
- Salary and benefits for clergy and lay staff

## **Frequently carried out through**

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

## **Liability**

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



# Key vestry responsibilities

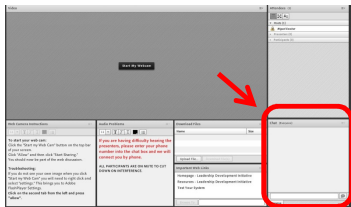
## **Meeting effectively**

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

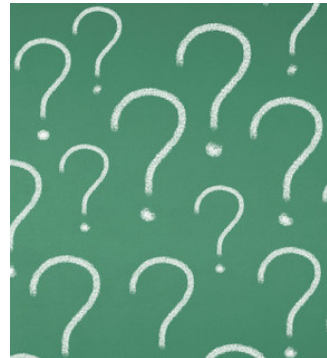




## Questions or comments?



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



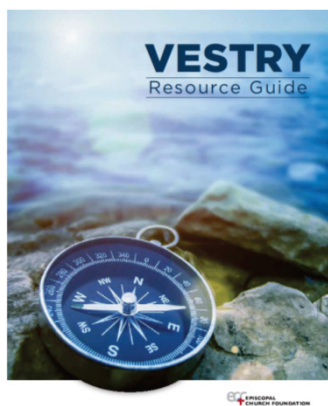
## Tools and resources for vestries



### Toolbox:

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

## Tools and resources for vestries



### Chapters include:

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

### Plus...

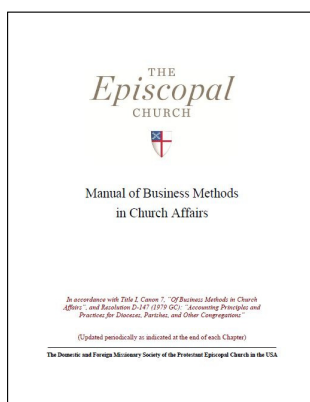
- Discussion questions and related resources
- Vestry job descriptions, vestry covenant, and stewardship statement
- Commissioning of wardens and vestry

### Distributed by Forward Movement

[www.forwardmovement.org](http://www.forwardmovement.org) or 800-543-1813



## Tools and resources for vestries



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

[www.episcopalchurch.org/page/manual-business-methods](http://www.episcopalchurch.org/page/manual-business-methods)

### Chapters Include

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



# Tools and resources for vestries

**The NEW Executive/Insite Report**

Prepared for: Trinity Cathedral - Cleveland  
 Study area: 3 mile radius - 2230 Euclid Ave Cleveland OH 44115-3405

Base State: OHIO  
 Current Year Estimate: 2012  
 5 Year Projection: 2017  
 Date: 9/2/2012  
 Semi-Annual Projection: Spring

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

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

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

**THE STUDY AREA**

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

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

[www.episcopalchurch.org/page/studying-your-congregation-and-community](http://www.episcopalchurch.org/page/studying-your-congregation-and-community)

## Information Available

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



# Potential next steps

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

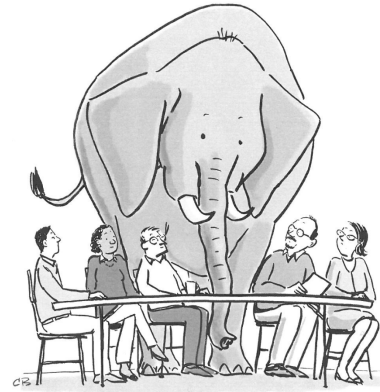


Newest vestry member Heather's suggestion to remove the pews was an excellent conversation starter.



## Potential next steps

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



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



## Upcoming ECF webinars

**Go to [episcopalchurchfoundation.org/calendar](http://episcopalchurchfoundation.org/calendar) for more info and to register!**

### Investment Strategies for Endowments/Invested Funds for 2016

January 27, 2016 from 7-8pm ET

This webinar will review investment returns of 2015 and explore the opportunities and pitfalls of investing in 2016.

### Senior Warden Ministry: Mission Impossible?

January 28, 2016 from 7-8pm ET

Presented by a current and former senior warden, this webinar will present practical tips and considerations for those planning to serve as senior warden for their parish and rector.

### Choosing a Planned Giving Shepherd for your Church or Episcopal Entity

February 3, 2016

Learn what qualities your congregation or Episcopal entity should be seeking in a volunteer for this vitally important role and what resources and knowledge can help to maintain a successful program.



## Contact us

ECF website: [www.episcopalfoundation.org](http://www.episcopalfoundation.org)

ECF Vital Practices: [www.ecfvp.org](http://www.ecfvp.org)

Email: [ecf@episcopalfoundation.org](mailto:ecf@episcopalfoundation.org)

Phone: (800) 697-2858

