

The Vestry Hand-Off **By Linda Grenz**

The Annual Meeting is over, the new leaders have been elected and it's time to start working together. How do you make the transition from the former leadership team to the new team? Some churches just schedule the next vestry meeting and keep on as if nothing happened. Others hold a vestry retreat soon after the elections. And some are very intentional about orienting new members and bringing them on board.

What you do will depend on your congregation's size and the experience of your newly elected members. A small church where formal and informal leaders know just about everything that's happening in the church and where the newly elected vestry members have all served before may be able to do a quick review in a one-on-one conversation or at the first meeting. But most congregations will need to do more. Here are some suggestions to consider:

- Give new vestry members the minutes and finance reports from the last couple of years. Better yet, have a vestry member or two sit down and review the significant issues and decisions so the incoming members have the "story" as well as the dry facts.
- Order copies of [*The Vestry Resource Guide*](#) from the Episcopal Church Foundation for each new vestry member. Encourage them to review their roles and responsibilities and/or write and share your own list.
- Establish and share expectations for how you will function, attendance (at meetings, worship and parish events), length of meetings, etc. It is often helpful to have the group develop and sign a covenant that outlines behavioral norms (a good retreat activity).
- Outgoing members with specific roles (warden, treasurer, liaison to a group, etc.) should meet with the person taking on that role and review what has been done, how to do specific tasks, who the players are, etc. This is generally best done in a one-on-one meeting or with a couple of people present. If the role is liaison with a committee, for example, you may want to include the convener of that committee.
- Consider ongoing roles for members with key roles. For example, clergy and wardens may find it helpful to have a former wardens group that meets a couple of times a year to talk about what happened in the past and how it relates to what's happening now. Former treasurers can serve on the Finance Committee or serve as a resource to the current treasurer.

The key things you need to do are:

- establish expectations and norms,
- pass along crucial information, and most importantly,
- build relationships.

Do those things well and your leadership transition will go well.

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