



## Lilly National Initiative to Address Economic Challenges Facing Pastoral Leaders

### *“From Economic Challenges to Transformational Opportunities”*

#### Highlights

##### Overview

The Episcopal Church Foundation (ECF) has received a three-year grant as part of the Lilly Endowment’s National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF’s Initiative entitled “*From Economic Challenges to Transformational Opportunities*” is providing lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21<sup>st</sup> century by:

- *Heightening awareness throughout the Episcopal Church of economic challenges facing clergy and their impact on congregational growth and vitality*
- *Developing a theological focus on the role of money in religion and society in the curriculum of seminaries and formation institutions*
- *Increasing clergy financial literacy about personal finance through tools and resources and enhancing their capacity to effectively manage congregations*
- *Empowering a greater number of clergy who, in partnership with laity, will provide quality financial and managerial leadership for congregational growth and vitality*

##### Process

Using a holistic approach, this initiative targets times of transition and other formative moments in the arc of ministry as critical opportunities for transformation and growth. For clergy this occurs during seminary, preparing to move from seminary to parish ministry, taking on a first cure or new rectorship; for congregations, transitioning from one rector to another or moving from a full-time to part-time priest.

##### Programmatic Components

*During Seminary Formation:* Curriculum guidelines and tools for faculty to help future pastoral leaders talk, preach and teach about money. **Progress:** Faculty from Virginia Theological Seminary, Seminary of the Southwest and Bishop Kemper School for Ministry are researching and determining next steps in moving forward with these objectives. In 2018 ECF will host a summit of Episcopal seminary deans/faculty to explore the role of seminaries in addressing the economic challenges facing pastoral leaders.

*Leaving Seminary:* Orientation to personal financial planning and literacy and parish finance and administration. **Progress:** Partnering with the Church Pension Group (CPG), ECF held its first “Success after Seminary” regional meeting for seminarians and their spouses in September 2016 in New Jersey attended by seminarians from 14 dioceses and 8 seminaries. In September 2017 two

regional meetings were completed in NJ and TX gathering attendees from over 40 dioceses and 8 seminaries and formation institutions.

*After Seminary Formation: Boot Camp for Rectors and Lay Leaders:* In-person conference for newer clergy and their lay leaders with training on how to collaboratively address the challenges of parish finance and administration, visioning and planning, stewardship and fundraising, and team leadership. **Progress:** In collaboration with CPG, ECF held its first Boot Camp in October 2016 with clergy and lay teams from nine congregations from four Episcopal dioceses in the Northeast. A second Boot Camp was held in Atlanta with fourteen congregations from ten Province IV dioceses, and a third Boot Camp was completed for alumni of the Episcopal Divinity School in June 2017. A pilot one-day Boot Camp in Spanish was held in August in the Diocese of Washington. An event for bishops and diocesan leadership is being planned for the fall of 2018.

*Post-Boot Camp Support:* Webinars, online tools and congregational coaching and peer groups to facilitate the development and implementation of action plans. **Progress:** ECF designed a post-Boot Camp coaching component for participating leadership teams for six months supplemented by group calls and a dedicated Facebook page.

*Ministerial Excellence Fund (MEF):* Grants to entrepreneurial clergy with the ability to help transform congregations but for whom personal financial challenges provide significant impediments. **Progress:** In the first year of the program, ECF approved and distributed 2016 matching grants to nine clergy from four geographically diverse Episcopal dioceses. 2017 grants are in process.

*Resources for the Wider Episcopal Church:* Webinars, articles, printed resources on economic challenges, parish finance and administration and culturally-relevant resources for Spanish-speaking and bilingual congregations. **Progress:** Pursuant to ECF's Lilly Financial Literacy series, webinars include: "Fearless Finances – A Practical Approach to Parish Budgets" and "Money: What's it to you?" ECF Vital Practices featured articles on "Rethinking Clergy Education", "Basics of Church Financial Reporting," and "Testing Mammon: Financial Discipleship." ECF is in the process of developing a Finance Resource Guide as well as financial resources and tools for Spanish-speaking and bilingual congregations.

## **Implementation**

ECF is sharing progress on the implementation of all aspects of the program on its website through its dedicated Lilly page. ECF is also fostering collaborative networks with the Church Pension Group (CPG), Episcopal formation institutions, congregations, dioceses, and other entities in all aspects of this initiative, including the Episcopal Diocese of Indianapolis – another Lilly grant recipient.

## **Monitoring**

ECF is evaluating the efficacy and impact of all aspects of the program throughout the three years, making modifications as necessary in consultation with the Lilly Endowment Inc. The five-member Lilly administrative team from ECF met with other grantees in Indianapolis in November 2016 to network and share ideas and strategies, and will again in November 2017.

## **Funding**

During the three-year grant, ECF will receive approximately \$320,000 each year of the grant – 2016, 2017 and 2018. ECF received a Phase II grant for 2019-2021 and a Phase III for 2023.

For further information on ECF's initiative, please refer to <http://www.episcopalfoundation.org/programs/lilly-national>