

## **Practical Matters**

### IN THIS ISSUE:

**1**  
*Managing Resources,  
Part 1, Finances*

**5**  
*Shared Calendar =  
Less Conflict*

**8**  
*Supporting First  
Responders*

**11**  
*Recorrer la senda  
de las relaciones/  
Walking the Road of  
Relationship*

# *Managing Resources, Part 1 Finances*

BY NANCY DAVIDGE AND SUSAN ELLIOTT

Sound stewardship of the parish's property and resources is a key area of vestry responsibility. As the legal representatives and agents of a parish, the vestry functions much like the board of any nonprofit organization, with responsibility for finances and management of property and human resources.

The other areas of vestry responsibility —mission, structure and organization, team building, vision, and strategic thinking— look pretty much alike, whatever the size of your congregation. Things get a little more complicated when we consider the vestry's responsibilities for finances, human resources, and buildings. In large churches with paid staff, vestry duties are mostly geared to governance and oversight in these areas, i.e. holding the staff accountable for their management roles, making sure funds are used efficiently for the

church's life and mission, and seeing that the church meets the canonical and legal requirements of the church and state. In small faith communities with few to no staff, the oversight and management roles often merge, with the vestry managing everything from the Sunday collection to paying taxes to maintaining the church's sidewalks.

The same standards apply whether exercising oversight or hands-on management. The vestry is responsible for ensuring that the rules and practices for managing the church's financial, personnel, and property resources are fair, transparent, and in compliance with state laws and church bylaws as well as diocesan and church-wide canons. The vestry does not need to manage everything, but it needs to know how the books are kept, the state of the church's finances in relation to the budget, the plan for the

annual audit, who is managing the repairs to the roof, and much more. Where work is delegated—whether to staff, committees, commissions, or individuals—clear lines of authority and accountability need to be determined, agreed to, and acted upon.

For some vestry members, these fiduciary duties are a piece of cake—part of their everyday business life. Others find it easier to understand theology, human relations, or nearly anything other than taxes and financial statements. If you're that second person, don't hesitate to speak up and ask questions. Clarity and straightforward talk on church finances begin with the vestry.

### **Financial Management**

Vestry financial oversight is a leadership function that directly impacts your church's future. It would be nice to think faith communities are immune to financial mismanagement, but that is not the case. You may know stories from your own congregation or other faith communities where (intentionally or through neglect) funds have gone missing, taxes have not been paid, or expenses have been poorly documented.

Poor administration combined with a lack of accountability and transparency in financial matters

directly undermines the congregation's trust and subverts the church's mission.

Financial management is a complex topic, and we encourage you to ask questions. It is all too easy for vestry members to approve financial reports they do not understand and to avoid the discomfort of asking hard questions. The hard questions and their corresponding answers are necessary and vital to your church's health.

### **Good Financial Management Begins with the Budget**

The church's annual budget is one of the most effective tools the vestry has for its role as fiduciary steward of the church's assets. Adding a percentage increase to last year's line items is not enough, though. You should have a budget planning process in place that combines your everyday income and expense information with what you are learning about where God is calling your faith community. The result is a realistic and balanced budget that supports your church's growing understanding of its mission and vision.

There are different approaches to this annual budgeting process. In smaller congregations, the rector, wardens (in the absence of full-time clergy), or treasurer

will manage the budget formulation process. In larger churches, program and administrative staff will also be involved. Sometimes a finance committee or commission manages the effort. However organized, it is important to have a defined budgeting process that provides for clear delegation of responsibilities and a timeline for the task. Budget formulation should be based on priorities and basic premises set by the vestry and rector, guided by real financial data and input from program leaders and staff. Discussing the priorities that guide the budget process with the congregation, as well as your hopes and challenges, helps them understand and support the budget that is approved.

### **Sound Business Practices**

When it comes to business practices, it is important that vestry members recognize that this work is guided by the canons of The Episcopal Church, diocesan canons, federal, and state laws.

Financial policies and procedures for everything from counting and depositing the offering to accounting, reporting, and implementing safeguards are critical, whatever the size of your faith community. Your church should have written fiscal policies and procedures that are reviewed annually. You should

provide training for employees and volunteers who work with church finances. Many dioceses conduct workshops or offer training on church finances and training. Policies and procedures must include appropriate safeguards protecting the integrity of the people responsible for the disbursement and transfer of congregational funds, documentation for all reimbursed expenses, and monthly review of all fund transfers and account balances.

In large congregations staff manages this process, along with oversight from a finance committee and the treasurer, who reports to the vestry. In a small church the vestry and the treasurer may manage everything. In either case, the vestry should know who is responsible for handling money, managing and documenting financial transactions, paying taxes, and arranging the annual audit. Standard business and accounting practices should be followed. The treasurer should provide concise monthly financial statements that include a balance sheet, an income statement, a cash flow statement, and budget projections for each month.

### Different Funds for Different Purposes

Vestry members need to know the names and functions of all funds

maintained for the congregation, where they are deposited, and who has access to each account. Churches use various fund types to manage their assets:

- **Unrestricted funds** (general operating budget) may be used for any purpose designated by the vestry.
- **Reserve funds** are set aside by the vestry for specific purposes. Their purpose can be changed by vestry action.
- **Restricted funds** are designated by donors for specific purposes and must be used for those purposes. Examples include contributions raised for a building fund or a columbarium fund. They may also include a capital fund from which only the interest income may be spent.
- **An endowment fund** requires that the principal be maintained, with distributions made using either an “income only” or the more recently allowed “total return spending” policy. The endowment documents should give clear guidance on the purpose of the fund, whether it is restricted or unrestricted, and outline spending policies, purposes, and investment asset allocation. It is risky to use endowment

income for general operating expenses—and all too common. If this is a practice in your congregation, your vestry’s gift to the future could be to begin reducing the church’s reliance on the endowment. The draw from the endowment might better be used to support a capital reserve fund.

- **Savings accounts** are often used for special or restricted funds. The accounts must be in the name of the church and not in the name of the treasurer or any other individual.
- **Clergy discretionary funds** are guided by diocesan canons. It is important to understand that they are parish funds, not personal accounts or additional compensation. The fund must be included in the annual audit and other financial reporting.

### Taxes

Taxes are primarily the responsibility of the treasurer, but vestry members can be held liable for tax violations and should be familiar with the general requirements. While Episcopal congregations are tax-exempt organizations, they are still required to comply with federal laws for withholding and reporting employee income taxes

and Social Security taxes. There are other situations (such as sales tax or unrelated business income) where your church may carry liability. To reduce your tax liability, we recommend that you use a payroll service rather than doing it in-house.

It is helpful to consult with appropriate professionals regarding your particular situation, starting with your diocesan finance officer. You can learn about federal reporting requirements for Episcopal churches and the Episcopal payroll services recommendations provided on the Church Pension Group website. [www.cpg.org](http://www.cpg.org)

Annual Audit <http://www.ecfvp.org/vestrypapers/finance-and-administration/audits-practicing-internal-controls/>

The annual audit, required of every congregation and submitted to the diocese, is an effective tool for the vestry's fiduciary role. It ensures that accounts and the treasurer's reporting are accurate; funds are safe and correctly allocated; financial policies, procedures, and record keeping are followed; and the flow of cash receipts and payments is controlled. Where needed, recommendations for improvements are provided. On occasion, the annual audit reveals a serious problem.

But most often, the annual audit documents that sound financial practices are being followed—a protection for all who handle your funds. That assurance enables the congregation to pursue its mission and vision with confidence in the accuracy and safety of its finances and those who manage them.

Part 2 of this article, offered in December 2015 and found on page 26, offers an overview of the vestry's responsibilities related to insurance, reporting, property management, and human resources (volunteer and employees).

*This article is an excerpt from the 2015 edition of the Vestry Resource Guide, <http://www.episcopalfoundation.org/programs/ecf-publications/vestry-resource-guide>, an Episcopal Church Foundation (ECF) publication by **Nancy Davidge**, ECF associate program director and editor, ECF Vital Practices and church communications writer and consultant **Susan Elliott**. The Vestry Resource Guide helps vestry members and clergy work together to become an effective, even transformational leadership team. With information and recommendations for congregations of all shapes and sizes, this is an essential tool to help vestries focus on what God is calling them to do in the world. Available in*

*English, <http://www.forward-movement.org/Products/1951/the-vestry-resource-guide.aspx>, or Spanish, <http://www.forward-movement.org/Products/1773/guacuteta-de-recursos.aspx> and in both print and eBook formats.*

### Try This

Three questions every vestry should consider:

- How is your congregation's understanding of its mission and vision represented in your budgeting process? What steps might you take to develop a budget that reflects these values?
- Does your congregation have an accounting policies and procedures manual unique to your church in addition to the Manual of Business Methods in Church Affairs? When was the last time it was reviewed and updated?
- Are the financial statements of related non-worshipping entities (such as thrift shops, ECW, men's groups, preschools) reviewed by the vestry and included in year-end reporting, including the annual audit and parochial report filing?

## Resources

- “Audits: Practicing Internal Controls” by Martha Goodwill, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/finance-and-administration/audits-practicing-internal-controls/>
- “Create a Sound Parish Budget” by Craig Bossi, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/financial-planning/create-a-sound-parish-budget/>
- “Critical Feedback” a digest of resources related to managing parish resources <http://www.ecfvp.org/posts/critical-feedback/>
- “Discretionary Funds: Guiding Principles” by Gerald Keucher, a resource from ECF Vital Practices <http://www.ecfvp.org/yourturn/discretionary-funds-guiding-principle/>
- “Knowledge is Power” by William Doubleday, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/governance/knowledge-is-power/>
- Manual of Business Methods in Church Affairs <http://www.ecfvp.org/tools/manual-of-business-methods-in-church-affairs/> (Available in Spanish and English)
- “Rookie Treasurer” by Tyler Schleicher, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/finance-and-administration/lessons-from-a-rookie-treasurer/>
- The Episcopal Church Network (formerly National Association of Church Business Administrators) [www.nacba.net](http://www.nacba.net)

***Don't miss an issue of Vestry Papers! Sign up for your free subscription at [www.ecfvp.org](http://www.ecfvp.org).***

## Editor's Letter

Happy Birthday ECF Vital Practices! We're celebrating five years of ECF Vital Practices. To date, we've published 60 *Vestry Papers* issues online (that's 240 articles), plus thousands of Vital Posts blogs.

The best part? We couldn't do this without you – our contributors who share their stories, all of our readers and subscribers, and all of you who share each issue with others. Together, we've reached 391,531 unique visitors (and close to 2 million page views) since the site went live in late October 2010. Thank you.

At ECFVP we recognize how much attention to detail goes into any organization or effort. In this issue of *Vestry Papers*, we share articles and stories covering some of the practical aspects of managing a congregation. Our articles include:

- "Managing Resources, Part 1" by Nancy Davidge and Susan Elliott, offers an overview of the *Vestry Resource Guide's* chapter on finance and administration. Part 1 takes a broad look at the vestry's role in financial management including budgeting, the importance of sound business practices, taxes, and audits and offers links to additional resources at the end of the article. Part 2, offered in December, looks at insurance, reporting, property management, and human resources (volunteers and employees).
  - Many congregations share space with others and, even with good coordination and clear lines of communication, there may be times when conflict arises over use of space. In "Shared Calendar = Less Conflict," Ann Mellow identifies several key areas where coordinating calendars can minimize the misunderstandings that can lead to conflict.
  - Disasters happen. In "Supporting First Responders," Bruce Barnes shares how during a major fire, Church of the Redeemer quickly opened a cooling shelter for first responders due to the hard work of his congregation's disaster team. At the end of the article you'll find links to Episcopal Relief & Development's disaster preparation resources for congregations.
  - In "Recorrer la senda de las relaciones" Sarabeth Goodwin nos habla sobre su "urgente llamado" para comenzar una congregación en español en una parroquia de habla-inglesa, los obstáculos que han enfrentado y los éxitos que han logrado mientras siguen caminando juntos y construyendo una relación más estrecha.
- In "Walking the Road of Relationship" Sarabeth Goodwin talks about her burning call to plant a Spanish-speaking congregation at an English-speaking parish, the obstacles they faced, and the success they have had as they keep walking el Camino together and building closer relationships.
- In "Strong Administrators = Strong Church," Kathleen Hall invites us to "remember the roots as we celebrate the harvest," naming the people responsible for parish administration as a key part of a congregation's root system. She also shares some of the ways

she, and others in the Episcopal Diocese of Washington, help support and nurture those who serve in parish administration.

■ The opportunity to meet periodically with their peers can be a lifeline for parish administrators and treasurers. The popularity of the annual diocesan church administrators and treasurers' conference – and participants' request for more networking time – prompted diocesan staff Nancy James and Ann Turner to schedule informal gatherings around their diocese. "Administrator's & Treasurer's Lunches" provides others with a roadmap for setting up their own networking events.

■ In "Managing Resources, Part 2: Administration," Nancy Davidge and Susan Elliott focus on the administrative aspects of congregational leadership, looking at topics such as insurance, reporting, property management, human resources (employees and volunteers), and safeguarding our commu-

nities.

■ "Why Policy Matters" by Lisa Meeder Turnbull invites congregational leaders to consider the stewardship of structure and governance as a framework supporting the mission and vision of your congregation.

We encourage you to think about how the ideas presented in this and every issue might provide an impetus for evaluating and reflecting on what you might learn from the experiences of others. To help in your discernment, at the end of each article we offer a list of resources related to the topic. If you have a resource you'd like to share, please email me with the link or add it to the site using the Your Turn feature.

Not a subscriber? Subscriptions are free; visit [ECFVP.org](http://ECFVP.org) and click on the Subscribe tab on the upper right hand corner of this page. New subscribers are asked to fill out a short registration form to have Vestry Papers and ECF Vital Practices content delivered twice a month to your email inbox.

Faithfully,

Nancy

Nancy Davidge

PS: To make it easier to find the resources offered through *ECF Vital Practices*, please consider adding a link to ECF Vital Practices to your website. Here's how: Using your websites 'add a link' tool, insert our full URL – <http://www.ecfvp.org/>.

PPS: Do you live in an area with limited Internet access? If you have a smart phone, consider browsing ECF Vital Practices from your mobile device; the site has been optimized for smart phones which makes it easier to search for content.

# Shared Calendar = Less Conflict

BY ANN MELLOW

**Editor's note:** While this article references church-school relationships, congregational leaders will find that it relates to any number of church partnership relationships, especially when it comes to shared spaces.

*The parish Bible Study group organizes a longed-for a silent retreat – and requests the same Saturday as the all-school Family Carnival.*

*The head of school informs the rector that the pre-kindergarten class is over-enrolled and the school needs an extra classroom. The choir room is suggested as an option.*

*The kindergarten classroom is used for church school, which is taught by parish volunteers. The kindergarten teacher arrives on a Monday morning to find the block city that students had been working on all week has been taken down and the blocks scattered.*

*A group of longtime parishioners approach the rector during coffee hour, visibly upset. A number of pew cards are covered with drawings and doodles, apparently by*

*students during school chapel.*

Although Episcopal churches and schools are natural missional partners, the different purposes and pace of school and parish life do not always make a natural marriage.

The planning cycles of parishes and schools could not be more different. The seasons of the church year drive the cycle of parish life, while schools are organized around the academic calendar. Financially, parishes operate in a January-December time frame while schools normally follow a July-June fiscal year. Parishioners and parish employees may arrive or depart at any time of the year, but students and teachers begin and end their service only at designated times of the year. These are just a few reasons it's easy for schools and parishes quickly to become "out-of-sync" with one another.

A month-by-month church and school calendar that notes critical events and decisions, along with a well-understood process to seamlessly schedule shared spaces, are two tools that can make the dif-

ference between a collaborative relationship and a rocky one.

## Budget and Finance

Because schools and churches operate on different fiscal years, their respective budgets are drafted and approved at different times in the year. Churches usually adopt their budgets one or two months in advance of January 1. Schools, on the other hand, set tuitions and salaries and adopt the annual budget six months in advance, typically in January or February for July 1.

Annual revenue streams and cash flow patterns of schools and churches are also quite different. Schools charge a fee-for-service via an enrollment agreement and bill tuition in advance. This "pre-paid tuition" must be carefully booked and accrued over the course of the school's July 1-June 30 fiscal year. Churches, on the other hand, rely primarily on voluntary contributions that are expended on a calendar-year basis between January and December.

In the absence of well-timed discussions, the vestry and/or school board will be blindsided by unbudgeted expenses or reductions in revenue.

The annual board and vestry calendars can identify a specific time of year, most often in the fall, when the appropriate school and parish leaders meet to discuss any items for the upcoming fiscal years that may affect their respective financial positions. Ideally, these discussions are scheduled such that any necessary approvals or agreements can be secured in a timely way. The calendars should also include a regularized review of shared expense allocations or agreements, coordinated with each fiscal year

### **Discussions/Decisions Requiring Vestry Approval/Involvement**

The bylaws of both separately incorporated and non-separately incorporated parish, cathedral, and seminary schools normally note any number of decisions that require the vestry's consultation or approval, such as ratifying the annual slate of school board members, approving the school's annual budget and audited financial statements, or approving certain types of changes to or use of the physical plant.

The school's board calendar needs to be mindful of these approvals. Some schools find it helpful to schedule school board meetings one or two weeks in advance of vestry meetings so that school board and vestry agendas can accommodate required approvals or discussions.

### **Space and Physical Plant**

As with budget and finance, parish and school leaders should have well-timed conversations about any proposed changes to shared space or physical plant that will impact one another's programs or budgets so that changes can be planned, approved, and budgeted in a timely way.

For instance, the school may propose a change to the physical plant that requires vestry approval, or the parish may be exploring a new outreach ministry that could potentially impact a space used by the school. Critical "touch points" during the year should be noted on the annual vestry and board calendars, such as a preliminary conversation in the late fall to share any potential changes, followed by a spring meeting to confirm the school's summer construction projects as well as any mid-year needs that may have arisen at the parish.

In addition to major changes

to space use, it's important to have an effective and predictable process for the day-to-day use of church and school spaces. Something as simple as tables not being returned to their original layout, a room left untidy, or two groups with their hearts set on using the same space at the same time can create new wounds or open old ones about the degree to which the parish or school is respected by their missional partner.

Many parishes and schools designate "church space," "school space," and "shared space." Church or school programs take priority in their respective, designated spaces and it is understood by both parish and school staff and volunteers that scheduling any new event requires the permission of (or negotiation with!) the "primary user."

For spaces used by both the church and school (known as "shared space"), an annual calendar can be pre-populated with all of the ongoing programs and "normal use" events for the year. A church-school calendar meeting in February and then again in June or September to schedule the programming and major events in shared spaces can be enormously worthwhile.

Then, create a clear process for submitting and approving any new requests for use of shared space. An event planning sheet submitted at least two weeks in advance and approved at church staff meetings (if attended by the head of school or preschool director) or at a weekly or bi-weekly calendar meeting will avoid many a train wreck. Approved copies can then be sent to the parish and school offices. Or a shared online calendar can be created and maintained, with new requests noted a particular color until formally approved.

### **The NAES “Sample School Board Calendar”**

The National Association of Episcopal Schools’ “Sample School Board Calendar” incorporates critical touch points for the board and vestry and can be modified by each school to fit its needs. Ideally, each summer the head of school and executive committee (on which the rector normally sits) develop the board calendar for the upcoming year, paying attention to major operational and strategic items that will need the vestry’s involvement. The vestry can do the same for any of its agenda items that may involve or impact the school. The rector and head can then coordinate the two calendars to identify touch points for the coming year.

The “Sample School Board Calendar” calendar can also serve as a working guide for those parishes and schools seeking to evolve a small school committee into a larger and more fully-functioning school board; or help new rectors, heads of school and early childhood directors, trustees, and vestry members to better understand their respective roles and responsibilities.

Developing well-coordinated church-school calendars at both the vestry-school board and day-to-day levels can go a long way to insure a smooth the church-school relationship and avoid the most common shared life train wrecks that inevitably place the strength, vitality, and good will of both school and parish at risk.

*Ann Mellow is associate director of the National Association of Episcopal Schools (NAES). <https://www.episcopalschools.org> From 1995-2007 Ann was head of school at St. Luke’s School in New York City, a pre-kindergarten – grade 8 parish day school founded by The Church of Saint Luke in the Fields.*

*Founded in 1965, NAES is a voluntary membership organization of over 400 Episcopal schools from preschool through secondary school. NAES provides services, resources, and best practices relat-*

*ed to Episcopal school identity, leadership and governance, and spiritual and professional development. Learn more at [www.episcopalschools.org](http://www.episcopalschools.org).*

### **Try This**

Does your congregation share space or resources with another group? Perhaps groups within your congregation share space or other resources. When was the last time you met with leaders of that group to review your agreements and/or share calendars. Scheduling time to meet periodically to review your agreements, calendars, or other practical matters can be a good way to minimize the ‘train wrecks’ Ann refers to.

### **Resources**

- “Calendaring” by Brendon Hunter, ECF Vital Practices Vital Post <http://www.ecfvp.org/posts/calendaring/>
- “Can Planning Dazzle” by Richelle Thompson, ECF Vital Practices Vital Post <http://www.ecfvp.org/posts/can-planning-dazzle/>

- National Association of Episcopal Schools (NAES).  
<https://www.episcopalschools.org>
- Sample School Board Calendar (Download the pdf from the online article)
- “The Church-School Relationship: Shared Spaces and Expenses,” an NAES webinar, November 17, 2015. For more information or to register, click here. <https://www.episcopalschools.org/forms/meeting/MeetingFormPublic/view?id=57D3500000080>

***Don't miss an issue of Vestry Papers! Sign up for your free subscription at [www.ecfvp.org](http://www.ecfvp.org).***

# Supporting First Responders

BY BRUCE BARNES

*On July 21, Bruce Barnes received a call from his senior warden stating that a building near Church of the Redeemer in Pendleton, Oregon, had exploded and was on fire. This was the moment that the hard work of his congregation's disaster team paid off. Bruce sprang into action, and with the help of his team, opened a cooling shelter for first responders. Redeemer's planning process made it possible to work through a few minor hiccups and support County Emergency Management Services during the fire. Bruce shared his story in the September 2015 issue of Lamplight, a publication of Episcopal Relief & Development's US Disaster Relief team. It is reprinted here with permission.*

Last December, I joined with four others members of church leadership to complete a comprehensive disaster preparedness plan for Church of the Redeemer in Pendleton, Oregon. Church of the Redeemer focuses on nurturing relationships and ministry beyond the immediate worshipping family, so we made sure to include ways our gifts could be of use [to] the community in the event of an

emergency.

I hoped we'd never need the plan but felt confident we could handle most anything once we had discussed what we should do in the event of an emergency. We had discussed as a congregation that if it was needed, we wanted to open up our building in the event of a disaster. We'd even met with the county emergency services manager to let him know we were available.

One Tuesday morning, I'd finished breakfast and heard sirens. My wife took a call from our senior warden notifying us that the old city hall building behind and across the street from the church was on fire. I raced around frantically getting ready to head for the church when I received a call assuring me the church was not in danger. About that time I saw my first cellphone photo of flames from the top floor of the old city hall.

I grabbed a nearly-full case of water bottles, tossed it in the car and headed for the church, not even thinking to grab a copy of the disaster plan with all its emer-

gency phone numbers and names of willing volunteers.

On arrival, I ran around the outside of the building, through heavy smoke and onlookers, and spotted the county emergency services manager. I said we had the church open if needed, and he said they needed a place for the fire personnel to take breaks. Well, the church had no power, and of course David forgot his copy of the plan too. Oops.

While David made a sign to direct people to the right entrance, I phoned another member of the team who read off the volunteer contact information needed from the plan. Minutes after seeing the emergency manager, a county nurse was setting up equipment in the parish hall, followed by VFW [Veterans of Foreign Wars] volunteers that came out of nowhere with cases of water bottles and a tray loaded with sandwiches. About that time the first fire fighters showed up, sooty, sweaty, dropping into chairs, shedding outer layers – obviously tired. And expressing gratitude for having a cool place away from smoke to let down, clean up, and get

refreshed. They rotated in and out, taking breaks in shifts. While the nurse was checking the firefighters, I remember my head feeling kind of numb and thinking “I wonder how I’ll feel tomorrow.”

More food kept coming, and more cases of water bottles – from parishioners, a nearby restaurant, a grocery. Members of the church came in and helped in the kitchen. About five hours after opening the parish hall, it was all over. Fire crews gone, nurse gone, food and water sent to the fire station and the Salvation Army, the hall and kitchen cleaned up, power back on, and the building locked... ready for an evening small group gathering. The events of the day seemed surreal as I drove back home.

I now look back and think about the loaves and fishes. We ended up having three times the water bottles and food that was needed. The event didn’t last long, and when we cleaned up and left it was like it might not have even happened. The extra food and water was donated to local nonprofits and the fire department. What really hits me in the face is that we only actually called and connected with three people, and we were overwhelmed with far more help than we could have

imagined.

Many people have asked how it went, and each time I tell the story I’m more aware of things I’m thankful for. I’m so glad we created the disaster plan. If we hadn’t, the fire department would have had to improvise under some trees or find another place to use.

Others in the community have noticed what we did, and many have expressed appreciation for our action, including mention in a newspaper editorial.

I’m really proud of our congregation. This experience has given us a renewed sense of purpose and strengthened our commitment to be available to the community in times of need. In the future, we will be more confident that if needed in the future, we can do whatever we are called to do.

**Bruce Barnes** is Episcopal Relief & Development’s diocesan network coordinator and chair of the parish disaster team at Episcopal Church of the Redeemer in Pendleton, Oregon.

This post, <http://archive.constantcontact.com/fs152/1103773510270/archive/1122031654347.html>,

originally appeared in the September 2015 issue of “Lamplight: Celebrating National Preparedness Month!” The full title of the original article is “Success Story: Supporting First Responders During a Local Emergency.” Lamplight is a publication of Episcopal Relief & Development’s US Disaster Program. This article is reprinted with permission.

### Try This

When a disaster strikes, it helps to be prepared. It helps to have a plan. And, as Bruce and David discovered as they began to implement the plan in response to the fire, grabbing a copy of the plan didn’t occur to them as they rushed to get to the church.

From this experience, Bruce now recommends making these three tips part of your disaster plan:

- Save a copy of your disaster plan on your smart phone.
- Try to advertise your services with a sign or by word of mouth. Make sure that all responders know that your space is available.
- Remember to thank those who helped during church the following Sunday.

## Resources

- Episcopal Church of the Redeemer, Pendleton, Oregon <http://www.pendletonepiscopal.org>
- Episcopal Relief & Development, US Disaster Resource Library <http://www.episcopalrelief.org/press-and-resources/resource-library>
- Las mejores prácticas de la mayordomía por las oficinas del Ministerio Latino y la de Mayordomía del Centro de la Iglesia Episcopal <http://www.ecfvp.org/tools/las-mejores-prcticas-de-la-mayordoma/>
- Family Emergency Plan, FEMA [http://www.ready.gov/sites/default/files/FamEmePlan\\_2012.pdf](http://www.ready.gov/sites/default/files/FamEmePlan_2012.pdf)
- Help and Hope: Disaster Preparedness and Response Tools for Congregations <http://www.episcopalrelief.org/uploads/EducationFileModel/145file/9780827214989%20preview.pdf>
- How To: Provide a Temporary Neighborhood Shelter <http://www.episcopalrelief.org/uploads/EducationFileModel/91/file/HOW-TO-Temp-Shelter.pdf>
- Tips and Lessons: Individual & Family Preparedness <http://www.episcopalrelief.org/uploads/EducationFileModel/59/file/Family-Prep-Plan-1.0.pdf>
- Tips on Preparing Your Parish to Respond Effectively to a Disaster <http://www.episcopalrelief.org/uploads/EducationFileModel/131/file/Preparedness%20Planning%20Tips.pdf>
- “What’s the Plan?” a curated digest of resources to help congregations prepare for a crisis or disaster <http://www.ecfvp.org/posts/whats-the-plan/>

**Don't miss an issue of Vestry Papers! Sign up for your free subscription here.**  
**<http://www.ecfvp.org/account/register>**

# Recorrer la senda de las relaciones

POR SARABETH GOODWIN

## **Conversión en una feligresía multicultural: Invitación, hermandad de fiestas, compartir nuestras vidas, culto incluyente y gozoso**

Hace diez años, inicié mi ministerio ordenado con una ardiente llamada para plantar una feligresía hispanohablante en St. Stephen y la Encarnación en el corazón del Washington DC latino. No cabía duda en mi mente que Dios abriría todas las puertas necesarias para que ello ocurriera. Pero a medida que el sueño se fue convirtiendo en realidad, empecé a dudar de mi misma. ¿Vendrán los hispanohablantes a rendir culto en un lugar en el que la sacerdote es una estadounidense de raza blanca? ¿Cómo entraré yo en esta nueva cultura? Mi sabio mentor, el Rev. Jesús Reyes, me aseguró que mi futura feligresía me amaría tanto como yo la amaría a ella.

En lo que yo no estaba pensando era el impacto que contar con una feligresía hispanohablante tendría sobre los aspectos administrativos de la iglesia. Más al respecto más adelante en este artículo.

A los seis meses, el primer obstáculo que tuvo que enfrentar nuestra

feligresía incipiente, Misa Alegría, fueron nuestros propios malos entendidos culturales. Somos una feligresía diversa que representa 11 países. Necesitábamos aprender a entender nuestras diferencias y ser sensibles a ellas. Tuvimos malos entendidos, pero estamos aprendiendo a entender nuestras diferencias.

## **Tender puentes**

El proceso de apreciación mutua entre las feligresías hispano y anglohablante fue más complejo. Como parroquia anfitriona, St. Stephen nos había dado una generosa bienvenida y nos había dado “las llaves del reino”, por así decirlo. Rendían culto los domingos por la mañana y nosotros lo hacíamos los domingos por la tarde, así que no teníamos conflictos por el uso del espacio, que podía ser un punto de fricción. St. Stephen’s empezó a definirse como una feligresía “multicultural bilingüe”, pero había poca interacción entre nuestras comunidades. Un grupo de gente interesada de ambas comunidades. Un grupo de gente interesada de ambas feligresías empezó a considerar cómo podríamos empezar a construir un puente para salvar la

brecha entre nosotros. Sabíamos que no podríamos forzar una relación... se tenía que desarrollar orgánicamente.

Misa Alegría empezó a invitar a la feligresía de la mañana a nuestros servicios religiosos, para que los vieran y saborearan. Pero vinieron muy pocos. Nunca es fácil aventurarse fuera de las zonas de confort. Nuestro primer gran avance fue cuando Misa Alegría decidió celebrar el Día de los Muertos en el edificio con la Ofrenda en la tradición mexicana. Algunos miembros de la Misa no vacilaron en decir, “Madre, esta no es nuestra costumbre”. Yo dije “Los sé, tampoco es la mía, pero juntos podremos hacerla nuestra”. Así que invité a toda la iglesia y para nuestro gran placer vino mucha gente de la mañana. La idea del culto y de la fiesta fue realmente ganadora. Después compartimos tamales calentitos y música animada. Sonrisas tímidas acompañaron los esfuerzos para compartir palabras, frases o historias. Estamos aprendiendo a relajarnos juntos y a llamarnos por nuestros nombres. La Ofrenda ahora es una tradición de toda la iglesia St. Stephen’s, la parte central de nuestra liturgia y celebración del Día

fde Todos los Santos y del Día de los Muertos.

Poco después iniciamos un proceso de integración. Ocho miembros de cada feligresía se unieron para leer *El viaje de Enrique*, la historia del angustioso viaje hacia el norte de un niño hondureño en busca de su mamá. El libro fue el punto de partida para compartir historias de la vida. Los de habla inglesa oyeron verdades dolorosas e inimaginables a menudo narradas entre sollozos. Esta experiencia invirtió los roles normales: los inmigrantes, tan a menudo alumnos, se convirtieron en maestros. Las opiniones cambiaron y los corazones se transformaron. Cuando se comparten los sufrimientos y las alegrías, se forjan lazos permanentes de afecto mutuo.

Miembros de ambas feligresías empezaron a querer pasar más tiempo juntos. Como se acercaba la Cuaresma, decidimos que nuestros servicios religiosos del Miércoles de Ceniza, Jueves Santo y Viernes Santo serían bilingües. Lo reforzamos con el Viacrucis bilingüe seguido por una cena sencilla y un texto de estudio común que incluyó comentarios personales. Estos servicios religiosos son importantes para mucha gente de ambas feligresías. Todavía hallamos que el sermón, que depende tanto del idioma, es la parte más

difícil del culto bilingüe. Nuestros esfuerzos no han complacido del todo tanto a los anglo como a los hispanohablantes. Por años nos abstuvimos de la Vigilia de Pascua. La Vigilia de Pascua era la “vaca sagrada” de la liturgia de St. Stephen’s y la liturgia del Libro de Oración está totalmente centrada en el idioma. Un día, mi colega me sorprendió cuando me informó que el Comité de Liturgia había decidido que ese año la Vigilia sería bilingüe. ¡Ay! Eso significaba que tendríamos que celebrar la liturgia de otra manera: tendríamos que hacer que fuera una experiencia dinámica y que impactara todos los sentidos. Fue un éxito rotundo. Para mí, la creatividad y la alegría de nuestra Vigilia de Pascua es prueba de la sinergia que proviene de adoptarnos plenamente los unos a los otros como hermanos y hermanas en Cristo.

### **Adaptación de nuestra manera de hacer las cosas**

Detrás de los aspectos públicos de culto y formación de comunidad, hay personal y voluntarios que aseguran que nuestra iglesia funcione bien. Dar la bienvenida a la feligresía de Misa Alegría a St. Stephen’s significó cambios –algunos mayores, otros menores– en el funcionamiento cotidiano. Hubo que hacer adaptaciones.

■ **Idioma:** Tenemos la suerte de tener miembros anglohablantes en nuestra feligresía que también hablan español y que pueden interpretar simultáneamente durante las reuniones de la junta parroquial, de la reunión anual y otras. Nuestro administrador parroquial, si bien habla español, a veces piensa que no tiene la capacidad suficiente para apoyar plenamente a la feligresía latina o a los grupos latinos que emplean las instalaciones de la iglesia, debido a su dominio limitado del idioma. Reconocemos que las próximas personas que contratemos tendrán que ser bilingües.

¿Qué más debe ser bilingüe en la iglesia? Muchos de los que acuden a Misa Alegría son inmigrantes que hablan poco inglés. Otros hablan inglés y español. Algunos de los feligreses de St. Stephen, pero no todos, son bilingües. Cuando rendimos culto, ¿deben nuestros boletines ser bilingües? ¿Y nuestros boletines y sitio web? Algunas cosas se ofrecen en ambos idiomas, pero la mayoría de ellos son sólo en inglés. Las traducciones llevan recursos; trabajamos con lo que tenemos, sentamos prioridades y tomamos decisiones.

■ **Presupuesto:** Cuando iniciamos la feligresía Misa Alegría, creamos un presupuesto separado para determinar los gastos relacionados con este nuevo ministerio. Con el correr del tiempo, a medida que ambas feligresías empezaron a pasar más tiempo juntas, algunas de las partes del presupuesto de Misa Alegría (tales como hospitalidad, artículos de oficina, etc.) se fueron incorporando al presupuesto primario de la iglesia.

■ **Canales de comunicaciones:** Lo que aprendimos con la experiencia es que, como en cualquier otra feligresía, diferentes feligreses de Misa Alegría prefieren diferentes tipos de medios. En todas las feligresías de nuestra Iglesia, los miembros de entre 20 y 40 años de edad a menudo prefieren obtener su información por medios electrónicos (boletín y anuncios de la parroquia), mientras que los miembros de mayor edad prefieren recibir el boletín y otros anuncios impresos y por correo. Los miembros latinos tienen una fuerte preferencia por la comunicación oral.

Lo que es diferente entre ambas feligresías es su uso de Facebook y correo electrónico. Si bien prácticamente todos los feligreses de Misa Alegría

están en Facebook, tienden a no usar el correo electrónico. Los feligreses anglohablantes sí emplean el correo electrónico. Lo que ha sido interesante es observar el cambio en los usuarios de Facebook para incluir más entradas en inglés. Debido a que algunos feligreses de Misa Alegría ponen sus comentarios en Facebook en inglés, la página ahora es más accesible para los que sólo hablan este idioma.

■ **Datos de los miembros:** Empleamos un solo conjunto de datos de los miembros, codificado de manera tal que nos permite distinguir entre ambas feligresías, para poder estar conscientes de los cambios y las tendencias en el conjunto de miembros, así como de otros datos. Datos de los miembros: Empleamos un solo conjunto de datos de los miembros, codificado de manera tal que nos permite distinguir entre ambas feligresías, para poder estar conscientes de los cambios y las tendencias en el conjunto de miembros, así como de otros datos.

### Formar relaciones

Seguimos formando relaciones mediante círculos de tejido, cantar himnos, acción y fomento político y fiestas de reunión

anual. Juntos hasta creamos nuestro “Nicho”, una hermosa capilla en nuestra iglesia empleando imágenes de la Virgen María y otro arte folclórico. La gente — toda la gente — de St. Stephen’s y la Encarnación está llamada a pensar de maneras nuevas y a modificar su visión. Todavía nos queda mucho trecho por recorrer; las cosas no han cambiado tanto, más bien han sido transformadas. Sabemos que estamos transitando el Camino de Jesús y siguiendo fielmente su llamada a nosotros en este momento.

*Sarabeth Goodwin es sacerdote episcopal y misionera latina en St. Stephen y la Encarnación, Washington, DC. También se desempeña como misionera latina transicional para la Diócesis Episcopal de Washington, donde supervisa y promueve la bienvenida a latinos de toda la comunidad diocesana.*

### Recursos

■ Estaciones de la Cruz Bilingües y recurso de estudio en común <http://www.ecfvp.org/tools/via-crucisstations-of-the-cross/>

- El viaje de Enrique <http://www.enriquesjourney.com> por Sonia Nazario y preguntas para conversación <http://www.enriquesjourney.com>

***¡No se pierda ningún número de Papeles de la Junta Parroquial! Inscribese aquí para recibirlos sin cargo.***

***<http://www.ecfvp.org/account/register>***

- “Expanding Our Understanding” by Sam Dessórdi Leite, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestry-papers/vision-planning/expanding-our-understanding/>

- “Ingredients for Joyful, Inclusive Bilingual Liturgy” by Anna Olson, ECF Vital Practices’ Vital Post <http://www.ecfvp.org/posts/ingredients-for-joyful-inclusive-bilingual-liturgy/>

- Misa Alegría slideshow (YouTube) <https://www.youtube.com/watch?v=ErRsfy95fk&feature=youtu.be>

- “Misión de Unión e Integración” por Daniel Vélez-Rivera, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/caring-for-each-other/misin-de-unione-integracin/>

- St. Stephen & the Incarnation/ San Esteban y la Encarnación, Washington, DC, sitio web <http://www.saintstephensdc.org> and Facebook page <https://www.facebook.com/SaintStephensDC>

# Walking the Road of Relationship

BY SARABETH GOODWIN

## ***Becoming a Multicultural Congregation: Invitation, Fiesta Fellowship, Sharing Our Lives, Joyful inclusive Worship***

Ten years ago, I began ordained ministry with a burning call to plant a Spanish-speaking congregation at St. Stephen and the Incarnation in the heart of Latino Washington DC. There was no question in my mind that God would open all the doors necessary to make this happen. But as the dream began to emerge as reality, I began to be filled with self-doubt. Will Spanish-speaking people come to worship in a place where a white North American woman is the priest? How will I enter into this new culture? My wise mentor, the Rev. Jesus Reyes, assured me that my future congregation would love me in the measure that I loved them.

The questions I wasn't thinking about related to the impact adding a Spanish-speaking congregation would have on the administrative aspects of the church. More on this later.

Six months in, the first hurdle for our fledgling Misa Alegría congre-

gation was to deal with our own cultural misunderstandings. We are a diverse congregation representing 11 countries. We needed to learn to be sensitive and empathetic to our own differences. We've had our misunderstandings but are learning to appreciate our differences.

### **Bridge Building**

The process of mutual appreciation between the Spanish and English speaking congregations was more challenging. St. Stephen as host parish had generously welcomed us and given us "the keys to the kingdom" so to speak. They worshiped on Sunday mornings and we worshiped on Sunday afternoons so we had no conflicts over space use which can be a common friction point. St. Stephen's began to define itself as a "multi-cultural, bilingual" congregation, but there was very little personal interaction between our communities. A group of interested people from both congregations began to consider how we might begin to bridge the gulf between us. We knew we could not force relationship... it would need to develop organically.

Misa Alegría began to invite the morning congregation to our services—to taste and see. But there were few who came. It is never easy to venture outside our comfort zones. Our first breakthrough came when Misa Alegría decided to celebrate the Day of the Dead complete with the building of the *Ofrenda* (offering) in the Mexican tradition. Some Misa members were quick to say, "Madre this is not our custom." I said, "You know, it's not mine either, but together maybe we can make it ours." So we invited the whole church and to our delight many morning people showed up. The idea of worship and fiesta was a winner. Afterwards, we shared steaming tamales and lively music. Shy smiles accompanied efforts to share some words, phrases, or stories. We are learning to relax together and to call each other by name. The *Ofrenda* is now a church-wide St. Stephen's tradition—a centerpiece of our All Saints'/All Souls liturgy and celebration.

Soon after, we began a more intentional process of integration. Eight members of each congregation came together to read

*Enrique's Journey*, the story of a Honduran boy's harrowing journey north to find his mother. The book was the point of departure for sharing life stories. English speakers heard painful, unimaginable truths often told through tears. This experience reversed the normal roles: immigrants, so often in the learners' seat, became the teachers. Opinions shifted and hearts were transformed. When you have shared both suffering and joy with another you are forever joined by bonds of mutual affection.

People in both congregations began to want more time together. Approaching Lent, we decided that our Ash Wednesday, Maundy Thursday, and Good Friday services would be bilingual. We bolstered that with Friday bilingual Stations of the Cross followed by a simple supper and common study piece which included personal sharing. These services are highlights for many people of both congregations. We still find that the sermon, being so language dependent, is the most difficult element of bilingual worship. Our efforts haven't been entirely satisfying for both English and Spanish speakers. For some years we held the line at the Easter Vigil. The Easter Vigil was the "sacred cow" of liturgy at St. Stephen's and the Prayer Book liturgy is totally language focused. One day, my col-

league surprised me with word that the Liturgy Committee had decided the Vigil that year would be bilingual. Yikes! This meant that we would have to do liturgy in new way: we would have to make the Vigil an exciting, alive multi-sensory experience. It has succeeded beyond our wildest imaginings. The creativity and joy of our Easter Vigil is for me proof of the synergy that comes from whole-heartedly embracing each other as brothers and sisters in Christ.

### **Adapting Our Way of Work**

Behind the public aspects of worship and community building, are staff and volunteers who make sure things at our church run smoothly. Welcoming the Misa Alegría congregation to St. Stephen's meant changes – some larger, many smaller – in day-to-day operations. Adaptations were needed.

■ **Language:** We are fortunate to have English speaking members of the congregation who also speak Spanish and are able to provide simultaneous translations during vestry, annual, and other meeting. Our parish administrator, while conversant in Spanish, sometimes feels limited in his ability to fully support the Latino congregation or Latino/a groups using

church facilities, due to his language skills. We recognize that future hires should be bilingual.

What else about the church should be bilingual? Many of the people in the Misa Alegría congregation are immigrants, with limited English. Others speak both Spanish and English. Some, but not all, members of the St. Stephen's congregation are bilingual. When we worship together, should our bulletins be bilingual? What about our newsletters and our website? Some pieces are offered in both languages, most are only in English. Translations take resources; we work with what we have, we prioritize and make choices.

■ **Budget:** When we started the Misa Alegría congregation, we created a separate budget as a way to determine the expenses related to this new ministry. Over time, as both congregations have begun to spend more time together, some of the line items from the Misa Alegría budget (i.e. hospitality, office supplies, etc.) have been absorbed into the primary church budget.

■ **Communications channels:** What we've learned over time is, as in any congregation, dif-

ferent members of the Misa Alegría congregation prefer different types of media. This congregation is consistent with congregations across our Church in that people in their 20s and 30s often rely on electronic communication for information (parish newsletter, announcements) while some of the older members prefer a printed, paper newsletter and mailings. There is also a strong preference among Latino/a members for verbal communication.

What's different between the two congregations is their use of Facebook and email. While almost everyone in the Misa Alegría congregation is on Facebook, they tend not to use email. The English-speaking congregation uses email. What has been interesting to watch is the shift in Facebook users to include more English language posts – as some of the Misa Alegría congregation post messages in English, the page becomes more accessible to those who only speak English.

- **Membership records:** We work with one set of membership data, coded in such a way that we can easily sort by the two congregations, giving us options for looking at member-

ship changes, trends, or other data.

### **Building relationships**

We continue working at building relationship through knitting circles, hymn sings, prayer vigils, political actions and advocacy, annual meeting parties. Together we even created our “Nicho,” a beautiful chapel in our church using images of the Virgin Mary and other folk art. The people—all the people—of St. Stephen and the Incarnation are being called to think and vision in new ways. We still have a long way to go; things have not so much changed as been transformed. We know we are walking el Camino—the Way of Jesus—and faithfully following his call to us in this time.

***Sarabeth Goodwin** is an Episcopal priest and Latino Missioner, St. Stephen & the Incarnation, Washington, DC. She also serves as the Transitional Latino Missioner for the Episcopal Diocese of Washington, overseeing and promoting the welcome of Latinos to the entire diocesan community.*

### **Resources**

- Bilingual Stations of the Cross and common study resource <http://www.ecfvp.org/tools/via-crucisstations-of-the-cross/>
- Enrique's Journey <http://www.enriquesjourney.com> by Sonia Nazario and discussion questions <http://www.enriquesjourney.com>
- “Expanding Our Understanding” by Sam Dessórdi Leite, ECF Vital Practices' Vestry Papers <http://www.ecfvp.org/vestry-papers/vision-planning/expanding-our-understanding/>
- “Ingredients for Joyful, Inclusive Bilingual Liturgy” by Anna Olson, ECF Vital Practices' Vital Post <http://www.ecfvp.org/posts/ingredients-for-joyful-inclusive-bilingual-liturgy/>

- Misa Alegría slideshow (YouTube) <https://www.youtube.com/watch?v=ErRsfy95fk&feature=youtu.be>
- “Mission of Union and Integration” by Daniel Vélez-Rivera, ECF Vital Practices’ Vestry Papers <http://www.ecfvp.org/vestrypapers/caring-for-each-other/mission-of-union-and-integration/>
- St. Stephen & the Incarnation/ San Esteban y la Encarnacion, Washington, DC website <http://www.saintstephensdc.org> and Facebook page <https://www.facebook.com/SaintStephensDC>

**Don’t miss an issue of Vestry Papers! Sign up for your free subscription here.**  
**<http://www.ecfvp.org/account/register>**

# Strong Administrator = Strong Church

BY KATHLEEN HALL

Do you ever think of your parish administrator as a primary part of your community's root system?

I often look at this image [<http://www.ecfvp.org/vestrypapers/practical-matters/strong-administrator-strong-church/>], hanging in the diocesan office's kitchen, with renewed appreciation during this season. It reminds me of the importance of strong, healthy roots. I love that these roots seem to exude energy. In healthy, vibrant parishes there often is a parish administrator bringing energy and grounding to daily operations.

Parish administration often calls upon those who hold this title to be jacks of all trades. These staff members care for the personal and personnel, manage facilities and fiscal realities, support liturgy and all those who worship. So, how do we care for them?

## Support Systems

In the Diocese Washington, we encourage participation in two activities:

- **Parish Administrators lunches:** This gathering was founded

by parish administrators. Held most months, administrators share stories and resources, get hands-on training with new technologies, discuss policy updates, and review changes to procedures and required documents. This also is a platform from which diocesan staff gets feedback about how our policies, procedures, and programs impact parish life – with an eye on the practical. The diocese sponsors these lunches so there is no cost to participate and each lasts about two hours.

- **Parish Administrators list-serv:** Resource sharing is the primary benefit of this exchange. Participants provide honest feedback about products and vendors, ask questions about a myriad of administrative issues, and participate in the recruitment of staff for parish-based openings. It also serves as a mechanism for caring for each other when a colleague faces illness, loss, retirement, or other transitions.

## Valuing their Contributions

Treating parish administrators as

trusted members of the leadership team is important. As a diocese, we recommend parish leaders consider these seven questions related to an administrator's professional development and engagement:

- Do you include professional development days in the administrator's letter of agreement?
- Do you pay for participation in skill building and spiritual well-being activities?
- Do you invite the administrator to share information and perspectives with vestry and other leaders?
- Do you seek the administrator's opinions about the effectiveness of programs and procedures?
- Do you routinely provide feedback to the administrator so she/he understands priorities and satisfaction with job performance?
- Do leaders (lay and employees) respect the demands and deadlines associated with the role?

- Is the administrator involved in leadership transitions, as appropriate, to ensure continuity?

By taking these into consideration, clergy and lay leaders care for and benefit from the voice of someone who may be the first point of contact for the community. The administrator may be the first to hear of concerns, ideas, and causes for celebration.

### Shared Toolkit

Making sure leaders and administrators share the same toolkit also helps strengthen parish operations. You'll notice that several articles in this, and every, issue of Vestry Papers and other publications reference a key resource list. Take time to explore these excellent sources of information, templates, checklists and guides - together. I've included my 'go to' resources in the list at the end of this article.

**Kathleen Hall** is director, human resources and administration for the Episcopal Diocese of Washington. Prior to joining the diocesan staff, she worked as a parish administrator and served on the vestries of multiple parishes. Kathleen is a frequent participant of the Church Pension Group's Benefits Partner conferences and

*Episcopal Business Administrators' Conferences. Currently she serves on the Church Pension Group's Client Council. Kathleen also worked in career services, volunteer services, and human resources in Virginia, Texas, and Maryland for universities, a science museum, a nonprofit pediatric hospital, and in public broadcasting.*

### Try This

Are you using any or all of the resources Kathleen recommends for a parish administration tool kit? If not, we recommend visiting their websites to familiarize yourself with them. Does your toolkit include a resource that's not listed? Please consider sharing in the Comment section below.

### Resources

- *Christianity Today's Church Finance* <http://www.churchlawandtax.com/topics/finance/>
- *Christianity Today's Church Law & Tax* <http://www.churchlawandtax.com>
- Church Pension Group website [www.cpg.org](http://www.cpg.org) and their *The Good Steward* newsletter [https://www.cpg.org/administrators/insurance/property-and-casualty/risk-manage-](https://www.cpg.org/administrators/insurance/property-and-casualty/risk-manage-ment/the-good-steward/)

[ment/the-good-steward/](http://www.cpg.org/administrators/insurance/property-and-casualty/risk-manage-ment/the-good-steward/)

- ECF Vestry Resource Guide <http://www.episcopalfoundation.org/programs/success-stories/2/the-new-vestry-resource-guide-is-here> (available in English and Spanish)
- *Manual of Business Methods in Church Affairs* English <http://www.episcopalchurch.org/page/manual-business-methods> and Spanish <http://www.episcopalchurch.org/es/page/manual-de-metodos-administrativos>

***Don't miss an issue of Vestry Papers! Sign up for your free subscription here. <http://www.ecfvp.org/account/register>***

# Administrator's & Treasurer's Lunches

BY NANCY JAMES AND ANN TURNER

For several years now, our diocese (Southern Virginia) has offered an annual daylong conference for church administrators and treasurers. The conference includes unstructured time for participants to network. This turned out to be participants' favorite part of the day and, in conference evaluations, they asked for us to build in more time during the day for them to talk to each other.

Ann Turner, our diocesan communications officer, and I put our heads together and, inspired by the diocesan Christian educators group, decided to invite all the treasurers and administrators to have lunch together on a regular basis.

Our diocese is pretty spread out, so we started in the area with the most churches (Virginia Beach/Norfolk/Newport News/Hampton). This area is coastal and intersected by rivers, impacting travel. Our first lunch was scheduled in Virginia Beach and the second, a month later, across the water in Hampton. Since then, each month we alternate between the two. They're not that far from each other, so some people come to both locations. Attendance ranges anywhere from

six to 12 people – the smaller size makes the gathering much more conducive to conversation.

It's a pretty simple plan – we meet at one of our churches, everyone brings their own lunch, the church provides coffee, tea, and water, and I bring soft drinks. There's no agenda for the 90-minute lunch. Everyone comes with their questions, problems, and ideas and we just talk. They share their successes and failures, get answers to questions, and advice on solving problems. Just as importantly, they get to know one another, around the table, face-to-face.

"I enjoy the fellowship," said Sylvia Lurty, parish administrator for Hungars Parish on Virginia's Eastern Shore. "I like hearing what problems and solutions other churches have, and I get ideas for my own churches."

We took a summer break from the lunches, but based on what we heard from participants, we offered an all-day ACS\* training workshop in June. I envision that other opportunities for education and training will arise from these casual gatherings.

What do we talk about? Topics are pretty wide-ranging: accepting credit cards, new medical insurance regulations, stewardship, online giving, financial and membership software, direct deposit, online bill pay, how to handle gifts of stock, food pantries, equity housing allowances, how churches communicate with members in emergencies, computer backups, and much more.

"I come to the administrators' lunches because it is incredibly helpful to know what other parishes are doing and how they handle the complex situations that impact us all," said Susan Nakigane, parish administrator at Christ & St. Luke's in Norfolk. "Almost by definition, the administrator or finance person at a church is the only person in their entire organization that does what they do, or knows what they know and it is a lonely position in that respect. It is wonderful to have fellowship and to share ideas with one another." "

The monthly treasurer and administrator lunches represent an outstanding opportunity to informally discuss issues or problems that individual

parishes have and to receive suggestions from more experienced church staff on possible solutions,” said Bob Frady, finance director at Grace Church in Yorktown. “It also represents an excellent opportunity to float ideas or suggestions and get input from a broad array of different sized parishes, and provides an informal networking opportunity for those that have similar positions and are working towards similar goals.”

After each month’s gathering, we take time to analyze how these lunches are going and decide if we need to make changes or adjustments. Meeting at lunch works in these areas because many of the churches in the area employ an administrator and see participation as beneficial to his/her job. Other attendees are retired and serving in a volunteer capacity.

After hearing churches in the Richmond area express interest, we added a third area to our monthly rotation. We picked a date and central location (our churches are fewer and further apart in this section of our diocese) and put an announcement in our weekly diocesan eNews. We immediately had six responses - so for now, we know that this is something our parishes want.

We’ve learned some things along the way. I want everyone to have a chance to bring up a question or topic, but I don’t want to cut short a good discussion if no one else has another question. I have learned that some people enjoy listening more than talking. So now at the beginning of each lunch, I ask who has a topic they want to discuss or a question to ask, and I write down the person’s name and the topic of their question. It helps me keep conversation moving and makes sure everyone gets what they need.

“I get so much out of our networking lunches,” said Diane Miller, accountant at Old Donation Church in Virginia Beach. “They allow us to really share what is going on in our own churches - successes and struggles and hear how others, whose work is so similar to ours, have met those events in their own Episcopal churches. In all the time I have worked I have not been in such a beneficial networking group.”

*\*ACS is a church management and accounting software program*

**Nancy James** is the comptroller for the Episcopal Diocese of Southern Virginia, where she has worked for ten years. Prior to that, she served seven years as church administrator for at Williamsburg Presbyterian Church in Williamsburg, Virginia, having previously served as comptroller for seven years at Bruton Parish Episcopal Church in Williamsburg. She has a degree in Business Administration from Christopher Newport University.

**Ann Turner** is the communications officer for the Episcopal Diocese of Southern Virginia. Prior to that, she served as the communications director at Eastern Shore Chapel Episcopal Church in Virginia Beach for 10 years. She has a degree in English from the College of William & Mary.

### Try This

Does your diocese or deanery/ regional area offer an opportunity for parish administrators and/or treasurers to network on a regular basis? Do you think this might be something other congregations would want to be a part of? What steps would you need to take to get something like this started in your diocese or deanery/region?

## Resources

- “5 Superpowers of Church Business Administrators” by Deborah Ike, The Church Network Weekly Update Archive (NACBA), <http://exclusive.multibriefs.com/content/5-superpowers-of-church-business-administrators/religious-community> (article) <http://exclusive.multibriefs.com/content/5-superpowers-of-church-business-administrators/religious-community> (NACBA)
- “Church Administrators are Saints” by Brendon Hunter, ECF Vital Practices curated list of resources related to parish administration <http://www.ecfvp.org/posts/church-administrators-are-saints/>
- “Collaboration: 4 Tips to Increase Effectiveness” by Jeremy Sierra, ECF Vital Practices’ Vital Post <http://www.ecfvp.org/posts/collaboration-4-tips-to-increase-effectiveness/>
- “From Secretary to Administrator” by Greg Syler, ECF Vital Practices’ Vital Post <http://www.ecfvp.org/posts/from-secretary-to-administrator/>
- “On Being a Stickler (or Not) by Jeremy Sierra, ECF Vital Practices’ Vital Post <http://www.ecfvp.org/posts/on-being-a-stickler-or-not/>
- “Top Ten Administrative Items for Senior Wardens” by Nancy James [http://www.ecfvp.org/files/uploads/Top\\_Ten\\_Administrative\\_Items\\_for\\_Senior\\_Wardens.pdf](http://www.ecfvp.org/files/uploads/Top_Ten_Administrative_Items_for_Senior_Wardens.pdf)

***Don't miss an issue of Vestry Papers! Sign up for your free subscription here. <http://www.ecfvp.org/account/register>***

# Managing Resources, 2: Administration

BY NANCY DAVIDGE AND SUSAN ELLIOTT

In “An Honest Question About Vestry, Church Organization,” blogger and priest Greg Syler asks, <http://www.ecfvp.org/posts/an-honest-question-about-vestry-church-organization/>

*“What if we haven’t actually begun to really pay attention to the actual corporate structure, the business of the congregation? What if we step back and assume, for a moment, that good programmatic work will indeed go on – such is the nature of the People of God; they’ll organize and pull off good ministries – and instead focus our energies, as vestry and clergy, on the duties of running an efficient, streamlined, functional and strong congregation, with all of the expectations of the 21st century?”*

Vestry service calls for decisions on a broad range of issues, both strategic and practical. And, regardless of the size of your church, your location, budget, or staffing, each vestry, as the legal representatives and agents of a parish, is responsible for ensuring the rules and practices for managing the church’s personal, property, and financial resources are fair, transparent, and in compliance with state and fed-

eral laws, church bylaws, and diocesan and church-wide canons. Part 1 of “Managing Resources,” (<http://www.ecfvp.org/vestrypapers/practical-matters/managing-resources-part-1-finance/>) looked at finance; in this article, Part 2, we’ll review topics relating to property and human resource management.

Remembering the vestry doesn’t have to manage everything, they should have a working knowledge of systems, process, and procedures, as well as established and clear lines of authority and accountability that are agreed to and acted upon.

## Insurance

Protection from fire, floods, and lawsuits is not in the Great Litany, but it should be in your insurance coverage. The canonical insurance requirements represent the bare minimum coverage your church needs. A more comprehensive list would include:

## Liability Insurance

- A base of at least \$1 million of general liability for injury and property damage

- Director and officers insurance (D&O) to protect the vestry for its decisions on behalf of the church
- Employment practices liability in the event of allegations of wrongful termination, discrimination, and sexual harassment
- Educator’s legal liability, if you have a school, to insure for claims against your teachers
- Worker’s compensation, required by law for churches with one or more employees; it is recommended that churches carry coverage for clergy, even where it is optional
- Network security and privacy liability and media liability

## Fiduciary Insurance/fidelity bonding

- In addition to the canonical requirement to provide a bond for the treasurer, the parish administrator, bookkeeper, and any other staff or volunteers who handle the church’s money should be bonded. A blanket bond is often included in policies from The Church Insurance Company.

### **Auto Insurance**

- Any automobile owned by a church or church organization should carry insurance with a policy limit of at least \$1 million.

It is important to purchase adequate coverage. Strong internal controls and safeguards in business practices combined with proper maintenance and accident prevention programs can help reduce your risk and insurance costs. In exploring insurance, be wary of off-the-shelf business policies that may not fit your faith community. Your diocese can provide further guidance on insurance. The Church Insurance Company, [www.churchinsurance-agency.org](http://www.churchinsurance-agency.org) a subsidiary of the Church Pension Group, also helps with assessing risk and provides cost-effective coverage for our churches.

### **Reporting**

Reporting requirements are a reminder that your faith community is part of the larger Episcopal Church. The annual parochial report, compiled by each congregation for the diocesan bishop and the General Convention, is an important source of vital information on the life of the church. Your vestry will review and approve the parochial report each year

before it is sent on to the diocese. Your diocese may also require additional reports as well.

### **Property Management**

In addition to providing a place where the congregation can pray, learn, and grow in faith, our church buildings provide a visible presence and witness to Christ in their local neighborhood. They also serve the needs of the local area in a variety of ways. While some Episcopal faith communities find that their mission does not depend on owning buildings, the buildings and properties of most Episcopal congregations are a primary physical asset. The vestry is responsible for seeing that the building and grounds are managed and maintained.

Two canonical rules have a bearing on the vestry's responsibility for church properties:

*A vestry cannot "encumber or alienate" [or transfer or convey] any property without the written consent of the Bishop and the Standing Committee of the Diocese.*  
– Title I. Canon 7, Section 3 (summary)

*All real and personal property held by or for the benefit of any Parish, Mission or Congregation is held in trust for this Church and the Diocese thereof in which such*

*parish, mission or congregation is located. The existence of this trust, however, shall in no way limit the power and authority of the Parish, Mission or Congregation otherwise existing over such property so long as the particular Parish, Mission or Congregation remains a part of, and subject to, this Church and its Constitution and Canons.*

– Title I. Canon 7, Section 4

As with finances, in mid-to-large congregations, staff generally handles building management and maintenance. In small congregations, the vestry may do that work themselves with the congregation's help. In churches of any size, the vestry often creates a buildings and grounds or property committee to monitor care standards and maintenance requirements and plan for building needs. The committee reports to the vestry.

### **Your Buildings Have a Mission**

With or without building staff and a property committee, it is easy for the vestry to get stuck in the knotty details of building maintenance, safety, insurance, and terms of use. At such times, it's important to step back and use big-picture time in vestry meetings to reflect on how your buildings serve your mission and your hopeful vision of the future - and

to consider how the buildings might serve them better. Make sure that you're not spending time on issues that can be delegated to a property committee or a special task force. If you face a truly overwhelming need, your diocese can provide help and guidance.

### ***A Few Building & Grounds Basics***

In overseeing your church's buildings and properties, you should make sure:

- Appropriate contracts are in place.
- Maintenance expenses are adequately supported in the budget.
- Appropriate records are kept—including an up-to-date maintenance manual and an inventory of all church properties and their contents.
- There is planning for routine, major, and emergency repairs—such as a new roof or a replacement boiler.
- Safety is monitored, safety equipment maintained, and environmental hazards eliminated. The Church Pension Group and Church Insurance offer resources related to risk management.
- Safety and security procedures are in place.
- Insurance is adequate and reviewed and updated annu-

ally.

- Carefully considered policies for free and rental use of building space are in place.

It's important to pay careful attention when you contract with outside employers, especially in regard to their contractual liabilities. Make sure you use only licensed and insured contractors. Unpaid volunteers are covered by your general liability insurance.

### **Human Resources Management**

Human resource management is concerned with recruiting and hiring; compensation and benefits; compliance with fair labor practices and laws; and employee safety, training, and review. Legalities aside, this puts your congregation in alignment with the baptismal promise to strive for justice and to respect the dignity of every human being. Good business practices and faithful discipleship come together in the way we treat our employees and our volunteers.

### ***Valuing Employees***

In churches with paid staff, the vestry is responsible for the welfare and safety of the ordained and lay employees of the congregation. These responsibilities include:

- Ensuring that all employees receive adequate salary and benefits for their position. The canons of The Episcopal Church direct congregations to provide equal access to and funding of health care plans for eligible clergy and lay employees. A canon related to pension coverage for lay and clergy employees is also in place.
- Ensuring that all employees have a clear understanding of their role through a job description or a letter of agreement, the equipment and training to do what is expected of them, and a process to ensure all employees (lay and clergy) receive regular feedback about their performance.
- Ensuring that all employees understand that they have the right to a workplace that is safe and free of harassment.
- Ensuring that children are safeguarded. Most dioceses and congregations require special training for those who work with children.

As a vestry member you do not need to manage these tasks but you need to ensure that they are being carried out.

Guidelines for compensation and benefits are typically outlined by diocesan employment policy. Check with your diocesan office

to ensure that you are meeting the diocesan minimum standards for your employees and for help in navigating the differences between clergy and lay compensation packages.

### ***Valuing Volunteers***

Faith communities of all sizes are essentially volunteer organizations, and the vestry plays a role in seeing that volunteers are cared for and valued. It is easy to get caught up in worrying about whether you will have enough Sunday school teachers or if you can find someone to serve as treasurer. These concerns may cause you to miss the love and faithfulness of the volunteers who wash and iron altar linens, tend babies in the nursery, change light bulbs, shovel the walk, and plant tulip bulbs. Finding ways to thank people and honor their ministries is important (this is the job not only of the rector but also of the vestry). It is equally important to nurture new volunteers so that tasks undertaken with enthusiasm and dedication don't begin to feel like life sentences for longtime volunteers.

In churches without paid staff, the vestry is doubly challenged to recruit and oversee volunteers to manage the business end of church life. Finding people

with the skills, talent, and commitment needed to manage the church's finances and property is crucial. In these settings, the vestry needs to walk a fine line that respects the contributions of these important volunteers while making sure they comply with standard business practices and church and diocesan canons and state laws. Provide a clear description of the jobs at the outset and assign a vestry member to provide help and answer questions when needed.

### **Safeguarding Our Communities**

Our churches promise people of all ages a safe place to gather with others and learn about the God who made and loves them. Keeping that promise—and insurance coverage for a variety of liabilities—means observing safe church policies and procedures.

#### ***Prevention of Sexual Misconduct***

Sexual misconduct policies are usually set by the diocese and adopted by congregations and organizations. At a minimum the vestry needs to:

- Establish policies regarding sexual misconduct, appropriate employee and volunteer relations, etc., and procedures to respond to any complaints.

- Ensure that all employees and volunteers receive adequate and accurate information, comprehensive training in these policies and procedures, an explicit
- understanding about what constitutes inappropriate behavior, and full knowledge of the consequences for engaging in such behavior.
- Ensure adequate supervision and oversight are provided to anyone leading a group—especially a group that includes children and/or youth.

Your diocese will have the latest information on safe church policies. Training materials are available from the Church Pension Fund's "Safeguarding God's People" series. <https://www.cpg.org/administrators/insurance/preventing-sexual-misconduct/overview/>

#### ***Alcohol & Tobacco Policies***

Clear policies regarding the use of alcohol and tobacco at church events are also a safety concern. The vestry should make sure that such policies are in place, and that these policies consider the safety of children and include the provision of equally attractive and immediately available alternate beverages at all church events.

*This article is an excerpt from the 2015 edition of the Vestry Resource Guide, <http://www.episcopalfoundation.org/programs/ecf-publications/vestry-resource-guide> <http://www.episcopalfoundation.org> an Episcopal Church Foundation (ECF) publication by **Nancy Davidge**, ECF associate program director and editor, ECF Vital Practices and church communications writer and consultant Susan Elliott. The Vestry Resource Guide helps vestry members and clergy work together to become an effective, even transformational leadership team. With information and recommendations for congregations of all shapes and sizes, this is an essential tool to help vestries focus on what God is calling them to do in the world. Available in English <http://www.forward-movement.org/Products/1951/the-vestry-resource-guide.aspx> or Spanish, <http://www.forward-movement.org/Products/1773/guacuteta-de-recursos.aspx> and in both print and eBook formats.*

### Try this

Policies and procedures are important management tools. These resources, when followed faithfully can reduce confusion and misunderstanding and increase clarity regarding roles and responsibilities.

What is your congregation's process for the periodic review of policies and procedures, insurance coverage, employee contracts and training, and required reporting? What plans do you have in place for regular review and updating? Who is responsible? If you don't have a comprehensive plan, what steps might you take to put one in place?

### Resources

- "Alcohol & The Church, An Update From General Convention" by Greg Syler, ECF Vital Practices' Vital Post <http://www.ecfvp.org/posts/alcohol-the-church-an-update-from-general-convention/>
- "Critical Feedback" a digest of resources related to managing parish resources <http://www.ecfvp.org/posts/critical-feedback/>
- Episcopal Church Network (formerly National Association of Church Business Administrators) [www.nacba.net](http://www.nacba.net)
- "Help When You Need It" by Steve Follo, ECF Vital Practices' Vestry Papers <http://www.ecfvp.org/vestrypapers/finance-and-administration/>

[help-when-you-need-it/](#)

- "Ignore These Details and You Might Lose Your Church's Website" by Nina Nicholson, ECF Vital Practices' Vital Post <http://www.ecfvp.org/posts/ignore-these-details-and-you-might-lose-your-churchs-website-2/>
- "Knowledge is Power" by William Doubleday, ECF Vital Practices' Vestry Papers <http://www.ecfvp.org/vestrypapers/governance/knowledge-is-power/>
- Liability Insurance: "For Things Done and Left Undone" by Steve Follo, ECF Vital Practices' Vestry Papers <http://www.ecfvp.org/vestrypapers/finance-and-administration/for-things-done-and-left-undone/>
- Manual of Business Methods in Church Affairs <http://www.ecfvp.org/tools/manual-of-business-methods-in-church-affairs/> (Available in Spanish and English)
- Resources from the Church Pension Group [www.cpg.org](http://www.cpg.org):
  - Federal reporting requirements for Episcopal Churches

- Information and resources related to employee benefits (lay and clergy) and payroll services
- Information and resources related to insurance coverage, including risk management <https://www.cpg.org/administrators/insurance/property-and-casualty/risk-management/risk-management-materials/>
- Safeguarding training programs <https://www.cpg.org/administrators/insurance/property-and-casualty/risk-management/safeguarding/>
- The Good Steward newsletter
- The Church Insurance Agency [www.churchinsuranceagency.org](http://www.churchinsuranceagency.org)
- “You Need It: Policy & Structure” by Brendon Hunter, ECF Vital Practices’ curated list of resources related to policy and structure <http://www.ecfvp.org/posts/you-need-it-policy-structure/>

***Don't miss an issue of Vestry Papers! Sign up for your free subscription here. <http://www.ecfvp.org/account/register>***

## Why Policy Matters

BY LISA MEEDER TURNBULL

Very few of us get excited about policy. The “committee on governance” rarely suffers from over-subscription. Even I catch myself apologizing when I include it in a vestry retreat outline.

What are some of the objections to policy? “It intrudes on our sense of community.” “It organizes things that should be relational.” “It takes all the fun out of being a congregation together.” While there are lots of good excuses for putting off stewardship of structure and governance, perhaps it’s time to look at why policy matters. Here are my responses to some frequently expressed excuses:

*Excuse: We have policies; the policies we need. At least I think we do....*

*Response:* Do you or don’t you? If you can’t put your hands on them, either you don’t have them or the policies you do have are not in effect in the life of the congregation. By that I mean that they are gathering dust somewhere, shoved in a file drawer, available if the bishop or the insurance company shows up on your doorstep. But in practice, working policy is made up as we go, based mostly on what seems

to make sense in the moment. It’s probably time to pull things out of the file cabinet and give it all a thorough review.

*Excuse: We don’t get enough bequests to really need a policy. Vestry just deals with it if one comes in.*

*Response:* Which came first, the chicken or the egg? If you want people to put something in a box, you must first build a box. Then you must put it out where people can see it. This is true not just for bequests, but for financial policies in general. Invest some time in putting your policy house in order, and then educate the congregation to their existence and purpose. For to those who are faithful with little, much will be given.

*Excuse: We’re just a small congregation; this is more for big churches.*

*Response:* Even the smallest church has assets, and people, and a budget...and vision, and dreams, and mission and ministry. A given policy might be less elaborate in a smaller organization, but it’s still part of responsible leadership and stewardship of the life of the com-

munity.

*Excuse: We don’t have employees, just a part-time priest.*

*Response:* Really? I suspect what this means to say is, “We don’t have paid employees.” Chances are good that you benefit from a substantial unpaid staff, members who only work a few hours a week or even a few times a year, but who contribute significantly to the work of the Gospel in your midst.

It might not hurt from time to time to check in with those ministries that have a clear volunteer structure as well as step back and bring intentionality to cataloging the many things that people “just do.” This will give you a sense of the abundance, grace, and quiet ministry in your midst, along with a realistic understanding of your vulnerabilities and liabilities: Has there been notable turnover in any area? Are we current in Safe Church Training? Is there burnout we need to attend to pastorally? Has any area become entrenched, making it difficult for others to exercise their gifts in turn?

*Excuse: We could spend all our time*

*just doing this. We'd never get anything done.*

*Response:* Yes, it can feel like structure gets in the way of ministry. We would all rather be doing ministry than describing who, what, and how. The good news is that for most of us, stewardship of structure and governance is a matter of reviewing and updating or reaffirming existing policy. New ministries that require policy preparation from scratch would be the exception—and what a great exception to have! If we are genuinely called to do something new, doing it well from the start is worth the effort. Ministry in fits and starts, or going back to attend to what we wish we had done at the beginning isn't any fun either.

So what's a vestry or bishop's committee to do? We all want to do the right thing, but just the thought of breaking out that policy manual overwhelms us—or at the very least brings to mind about 800 things we could do instead.

So where can we go for help? You might start by talking with your diocesan finance or other staff/missioner. And for all of us, the Episcopal Church Foundation is available for support and advice, much of it free or very affordable.

Their webinars and print materials are extraordinarily user-friendly. For as broad as my stewardship library is, I can tell you honestly that the best stuff comes from ECF.

If you suspect that your policies are in pretty good shape, but also believe that regular review is important, consider the solution hatched by one vestry I worked with recently: Policy of the Month.

This vestry has very simply made a list of all the policies they have, or should have, and scheduled them into a rota. When they get to the end of the list, they simply loop back to the beginning. They chose this model to ensure that each policy gets some sort of regular attention without taking on the onerous tasking wading through it all at once. Yes, it adds an agenda item to each month's meeting and yes, it does mean that committees will have some lead work in the month when a policy belonging to them is "on deck." In the long run, however, their careful attention to the ministry of good management will pay off as the congregation grows in its trust of and respect for vestry leadership.

And finally, as with all things that draw upon our gifts and graces, even this most tedious facet of leadership is undergirded by

prayer:

*Dear Lord, help us to find grace and truth in the details. Help us to understand money, both with the insights required of those with fiduciary responsibility, but also with the self-sacrificial wisdom commended by your Son. Help us to be ethical in our handling of wealth, courageous in our stewardship of a community of faith, and humble in the face of adversity. Help us to give due respect to order, but then to venture up the mountain where divine disorder is the higher law. As we manage the business of our congregation, help us to care even more for souls. We ask this in the Name of One who taught about money and then held out an empty hand. Amen.*

- Tom Ehrich

**Lisa Meeder Turnbull** former missioner for stewardship and congregational consultant in the Diocese of Maine, wrote this piece as an ECF Vital Practices' blog post, *Policy, Schmolicy*. It has been lightly edited and renamed for this issue of *Vestry Papers*.

## Try This

If you suspect that your policies are in pretty good shape, but also believe that regular review is important, consider the solution hatched by one vestry Lisa worked with: Policy of the Month.

This model ensures that each policy gets regular attention without taking on the onerous tasking wading through it all at once. While it adds an agenda item to each month's meeting and also requires some preparation by members, it also models good management.

Here's are the steps they followed:

1. Make a list of all the existing church policies as well as policies they should have but don't.
2. Schedule the items on the list into a rota. This could be time at scheduled vestry meetings or, during a meeting of a group formed to review policies.
3. Share the rota so that the vestry liaison, committee, or others responsible for a policy have time to prepare.
4. When the end of the list is reached, it's time to loop back to the beginning.

## Resources

- "Being on the Same Page" by Ronald D. Pogue, ECF Vital Practices' Vestry Papers <http://www.ecfvp.org/vestrypapers/governance/being-on-the-same-page/>
- "Fundraising Policy" St. Andrew's Episcopal Church, Framingham, Massachusetts <http://www.standrewsfram.org/documents/Church%20Fund%20Raising%20Policy.pdf>
- "Gifts: Thank You But???" by Erin Weber-Johnson, ECF Vital Practices' Vital Post <http://www.ecfvp.org/posts/gifts-thank-you-but/>
- "Hard Decisions, Winning Strategies" by Richelle Thompson, ECF Vital Practices' Vital Post <http://www.ecfvp.org/posts/hard-decisions-winning-strategies-2/>
- *Manual of Business Methods in Church Affairs* <http://www.ecfvp.org/tools/manual-of-business-methods-in-church-affairs/> (Available in Spanish and English)
- "Model Personnel Handbook for Parishes" shared by The Episcopal Diocese of Massachusetts [pensation-benefits-resources-parishes](http://www.diomass.org/inside/docs/com-</a></li>
</ul>
</div>
<div data-bbox=)

- "Policies & Procedures" St. Andrew's Episcopal Church, Pasadena, Maryland (2007) Editor's note: While dated, this sample shows not only the range of areas covered but also that the policy/procedure can be presented in a simple and straightforward manner. [http://www.standrewspasadena.com/content/about\\_us/policies\\_and\\_procedures](http://www.standrewspasadena.com/content/about_us/policies_and_procedures)
- "You Need It: Policy & Structure" by Brendon Hunter, ECF Vital Practices' curated list of resources related to policy and structure <http://www.ecfvp.org/posts/you-need-it-policy-structure/>

***Don't miss an issue of Vestry Papers! Sign up for your free subscription at [www.ecfvp.org](http://www.ecfvp.org).***