



## Best Practices for Vestry Leadership

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*September 17, 2013*



## Let us pray...

*Dear Lord, we elect, but you confer authority.*

*We occupy roles, but you form hearts.  
We are sensitive to who has power and who wants power,  
yet your Son took his place among the weak.*

*Help us to care more about vision than about viewpoint,  
more about servanthood than about rules,  
more about mercy than about merit.*

*Help us to have the courage to lead by serving and  
put aside the world's easier ways.*

*Help us to emulate the Apostles,  
not in the early days when they craved power and  
preference, but in the latter days after Calvary,  
when they prayed only for courage and wisdom.*

*All this we ask in the Name of One who led by serving and  
suffering. Amen.*



## What is the Episcopal Church Foundation (ECF)?

### Overview:

- Independent and lay-led foundation
- ECF's mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
- ECF carries out this mission through a wide array of programs including...



### Leadership Resources

- ECF Vital Practices ([ecfvp.org](http://ecfvp.org))
- Vestry Resource Guide
- Fellowship Partners Program
- Educational Events

### Financial Resources

- Capital Campaigns
- Planned Giving
- Endowment Management
- Educational Events

## Vestry Leadership 101 Presenters:



**Miguel Escobar**  
Program Director  
Leadership Resources, ECF



**Brendon Hunter**  
Assistant Program Director  
Leadership Resources, ECF



## For those just joining...

### A Few Notes:

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



Thanks for coming!



## Best Practices for Vestry Leadership



### The Role of the Vestry

- Establishing Framework
- Some Practical Realities



### Getting Everyone on Board

- Norms and Covenants
- Spiritual Practices
- Regular Retreats



### Three Leadership Practices

- Focusing on Mission
- Empowering Others
- Identifying & Recruiting New Leaders



### Build Your Toolbox

- Publications and recommended web links

## A Few Questions...

### What is your experience with being on the vestry?

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

### What is your role on the vestry?

*(check all that apply)*

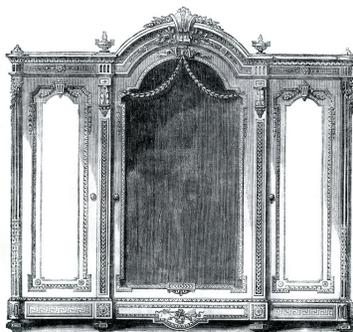
*Senior Warden, Junior Warden, Clergy, Vestry Member, Treasurer, Secretary/Clerk*

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

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



## What is the role of the vestry?



### The Role of the Vestry

*It's important to establish norms, and to do so, we need to have some common understanding and framework of what a vestry is and its role and function.*



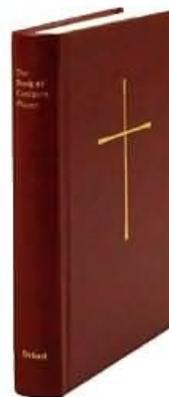
## What is the role of the vestry?

### What does the Book of Common Prayer say?

As a Church our mission is:  
 "... to restore people to unity with God and each other in Christ." (BCP, p. 855)

### Through whom does the Church carry out its mission?

"The Church carries out its mission through the ministry of all its members." (BCP, p. 855)



## What is the role of the vestry?

### What the Canons say...

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

*(Vestry Resource Guide p.11)*



## What is the role of the vestry?

### Management vs. Leadership



Keeping in mind practical realities, vestries still need to balance their roles as managers and leaders.

- Where do you think your leadership falls on this chart?
- Is your vestry more focused on management or leadership?



## What is the role of the vestry?

### Management

*As a vestry, you are a fiduciary with responsibilities both in state law and in canon (church) law.*

#### Fiduciary

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



#### Liability

- Accidents and other incidents occurring on parish property or during parish events
- Violation of any fiduciary responsibilities, contracts, or any other legal agreements (employment, wrongful termination, etc.)
- Any misconduct, sexual harassment, or discrimination



## What is the role of the vestry?

### Leadership

*Vestry leadership is different than leadership in other organizations, you are a Christian called by God and your peers to be a steward of your resources and for the greater good of your community.*

### Engaged Representatives

- You are part of the face of the leadership and represent the congregation
- All vestry members should have a clear understanding of all actions taken *and* can speak about them



### Community Engagement

- Develop relationships with local leaders: government, businesses, non-profits, other churches, schools, and colleges
- Do a neighborhood walk with a team from your congregation



## Getting Everyone on Board



### Orientations, Norms, & Spiritual Practices

*To effectively gather your leadership team together, it's important to share a common knowledge and understanding of structure, purpose, and vision.*



## Getting Everyone on Board

### Vestry Norms & Covenants

#### Norms

Establish framework or ground rules for how the group operates, functions, and acts.

#### Covenants

Puts norms into a working document that the group agrees to adhere to.

**Are you holding each other accountable?**  
*Publicly address inconsistencies.*



## Getting Everyone on Board

### Orientations

**Two types of orientations should be held annually:** one for new members to the vestry and the other for the newly formed vestry as a whole.

**For the newly formed vestry,** this is a time to review and revise, as needed, the norms and covenant.

**For new members,** be sure to cover the basics of definitions (which we covered earlier) and such things as:

**What is a...** bishop? priest? deacon? What do they do? Do we have one (or more)? Who are they?

**Canons and By-laws,** what are they and what's their purpose?

**Vestry or Bishop's Committee,** what's the difference?

**What is a diocese?** Why does it exist? Why do congregations give them money?



## Getting Everyone on Board

### Spiritual Practices



### Is Jesus on the agenda?

Build spiritual practices into all meetings, including vestry meetings.

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



## Getting Everyone on Board

### Spiritual Practices

#### Regular Retreats

Make room throughout the year for smaller and larger times for your vestry to engage in spiritual formation, strategic discussions, and fellowship.



#### Retreat. And Advance.

“How God can take Newton’s laws of motion and apply them to our spiritual growth:

An object at rest will stay that way; a church without time set aside for spiritual renewal won’t renew. And for every action, there is a reaction. For retreat, there can be great advance.”



*(“Retreat. And Advance”, ECF Vital Practices)*



## Getting Everyone on Board

### Spiritual Practices

### Holy Conversations

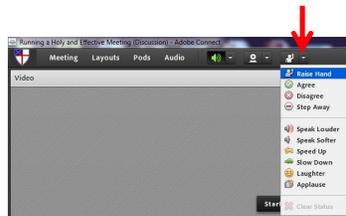
Having spiritual practices sets the framework for a group, discerning what God is calling them and their congregation to do and be.

This creates space for looking at your vision:

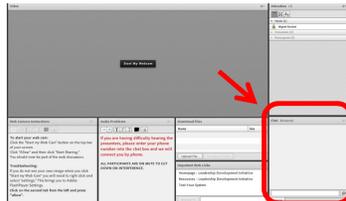
**Vision = Picturing a Hopeful Future**



## Questions or Comments?



Raise your hand and we'll unmute your microphone for your to talk.



Or use the chat box in the lower right side of your screen.



## Three Leadership Practices



*Three practices to keep in mind for those who are leading vestries:*

- Focusing on Mission**
- Empowering Others**
- Identifying & Recruiting New Leaders**



## Focusing on Mission

### Mission = What You Do

#### Questions:

- What is God calling your congregation to do?
- Prioritize “mission conversations” over “mission statements”
- What don’t you do?



## Identifying & Recruiting New Leaders

### Inviting new leadership

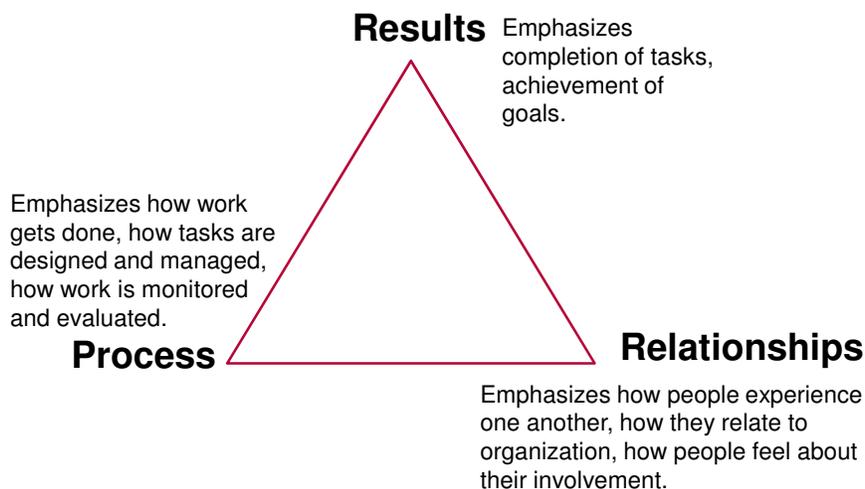
Have conversations with members of your congregation, especially newer members, and those around your community for potential partnerships with your congregation.

#### Things to consider:

- Process for inviting and discerning with potential candidates.
- Distinction between recruiting for a broad range of perspectives and asking people to “represent” subgroups.
- Youth and young adults can serve on the vestry.
- Healthy balance between focus on results, process, and relationships.



## Identifying & Recruiting New Leaders



- From Interaction Associates' Manual on Collaborative Leadership



## Empowering Others



### Giving Responsibility vs. Tasks

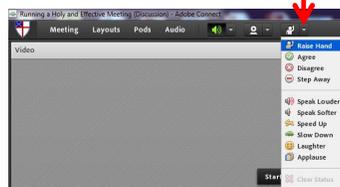
How are you enabling others to carry out the mission and ministry of your congregation?



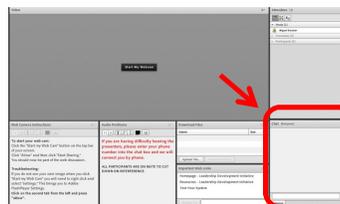
**Keep in mind:**  
A great volunteer does not necessarily make for a great leader to be on the vestry.



## Questions or Comments?



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## Build Your Toolbox

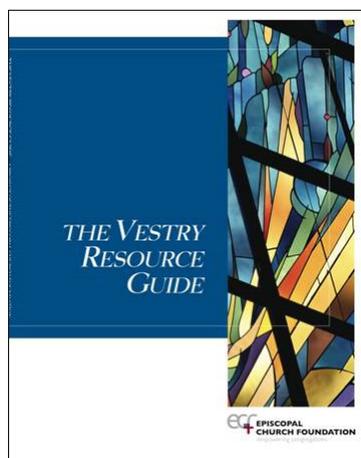


### Items to include:

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



## Resources



### Chapters include:

- The Ministry of the Vestry
- Being on a Vestry Means...
- Conflict is Natural
- Stewardship
- Navigating Transitions in Clergy Leadership

### Plus...

- Bible Studies and Discussion Questions
- Sample Job Descriptions
- Vestry Prayers for the Year
- Commissioning of Wardens and Vestry
- A Vestry Covenant

**Distributed by Forward Movement**

[www.forwardmovement.org](http://www.forwardmovement.org)

800-543-1813



## Resources

**ECF Vital Practices**  
for leading congregations

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**JANUARY 2013**  
**Framework for Vestry Success**  
Group dynamics will change and growing with each new vestry. In "Framework for Vestry Success", Sandy Kolb guides us through the key steps to give care and attention to. [More](#)

**Vital Posts Blog** [more](#)

**Telling Stories**  
Posted by Jeremiah Sierra on Jan. 14, 2013

**Managing Change**  
Posted by Rhonda Thompson on Jan. 11, 2013  
We received the keys to our new house last night. The kids ran from room to empty room, claiming their space and placing design elements. We brought the champagne to pop open a...

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**Get your copy of the award-winning guide for being on a vestry.**

**Action** Sign up for our free emails on vestry leadership, stewardship, change and more.

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**Social Media** Register for ECF's webinars offering a wide range of topics for lay and clergy leaders.

**Action** View a recording of the web conference for developing a committed and productive team.

**Sample Vestry Job Description**  
These examples give you a starting point when describing vestry members' responsibilities.

**Creating Strong Teams**  
View a recording of the web conference for developing a committed and productive team.

**A Suggested Order of Meetings**  
For vestry meetings, this template explains how to focus on missional leadership.

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

**Features**

- Vestry Papers
- Vital Posts
- Tools and Resources

**Register on ECFVP for**

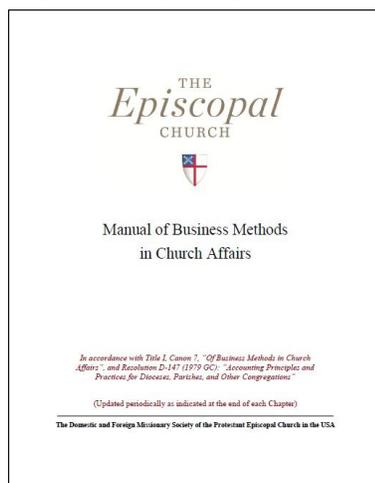
- Bi-monthly emails, including Vestry Papers
- ECF Events and Web Conferences
- Comment and participate in the online community

**ECF**

## Resources

### Manual for Church Business Methods

<http://www.episcopalchurch.org/page/manual-business-methods>



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

#### Chapters Include

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



# Resources

## The Episcopal Church Office of Research

<http://www.episcopalchurch.org/page/studying-your-congregation-and-community>

### The NEW ExecutiveInsite Report

Prepared for: Trinity Cathedral - Cleveland  
 Study area: 3 mile radius - 2230 Euclid Ave Cleveland OH 44115-2405  
 Base State: OHIO  
 Current Year Estimate: 2012  
 5 Year Projection: 2017  
 Date: 9/1/2012  
 Semi-Annual Projection: Spring

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

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

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



#### More Information

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

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

### Information Available

- Parish Report (Average Sunday Attendance and Pledge & Plate) for the past 10 years
- Community Profile (3 mile radius of your congregation) with 12 demographic insights including population, age, and household statistics and trends.



## Contact Us

### Episcopal Church Foundation

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

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

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

Phone: (800) 697-2858



## Contact ECF's Leadership Resources Team



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