Vital Teams: The Basics of Collaborative Ministry

Diocesan Vestry Retreat
Diocese of Southwest Florida
May 7, 2016
DaySpring Episcopal Conference Center

Welcome to Vital Teams!

• The Episcopal Church Foundation
• Vital Teams is a pilot initiative of ECF focusing on:
  • Training for lay and clergy leadership teams
  • Partnering with seminaries and leadership institutions
  • Creating tools for identifying new leaders

What is the Episcopal Church Foundation (ECF)?

Independent, lay led organization, founded in 1949
Empowers congregations through visioning and planning, leadership development, and raising financial resources for ministry
Through our programs, ECF is building a Church...
• Lay and clergy leaders work together to transform the Church
• Healthy, vital, vibrant Episcopal communities of faith
• Meaningful opportunities for Christian stewardship and effective fundraising
• Innovative, mission-based ways to be the Church of the future

Vital Teams’ structure
Introductions

• Presenter
• The Vital Teams Team

Overview for today

I. Vestries as vital teams
II. Three essential ingredients for vital teams:
   • Strong relationships
   • Clear processes
   • Focus on results
III. Identifying next steps
IV. Conclusion and debrief
Part I: Vestries as Vital Teams

Vestries as vital teams
Overview:
• The role of the vestry
• Key vestry responsibilities
• Tools and resources for vestry leaders
• Discussion on next steps

Discussion on purpose of vestry
• What are some of the key responsibilities of the vestry?
• Which do you see as the top priority?
• Where does God come into this?

The role of the vestry
A bit of history
• 'Vestry' as the parish robing room
• With congregational growth came 12 representatives with life-long terms
• Today vestries reflect diversity of congregation (including youth)

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

But what do vestries do?
The role of the vestry

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

- **Mission and Vision**
  - Helps articulate the mission and vision of the congregation

- **New Leaders**
  - Identifies new leaders for the congregation and wider Church

- **Stewards resources**
  - Manages resources and finances of congregation

What the canons say...

- Agents & legal Representatives
- Ensure standard business practices
- Ecclesiastical authority in absence of Rector
- Identify and nominating leaders for holy orders

How do the lists compare?

- **Ongoing Discernment**: Are there practices that your vestry is currently engaged in that helps it to discern where God is calling your congregation at this time and place?
- **Mission and Vision**: How is your vestry regularly reviewing and revising the strategic direction of the congregation? How is this being communicated to the wider membership?
- **New Leaders**: By what means does the vestry identify people who have the potential to be leaders in the organization? For the wider Church?
- **Stewardship of Resources**: How is the vestry ensuring that your congregation is good stewards of all resources including time, talent, and treasure?

1. Ongoing discernment/formation

- Addressing the question of ‘why’ together
- Getting prayer and bible study regularly on the meeting agenda
- Creating opportunities for ongoing formation for vestry members to become disciples
2. Mission and vision

• **Mission** is a succinct description of what it is that God is calling your congregation to do
• **Vision** is a hopeful picture of what your congregation, neighborhood, and wider world will look like once mission has been accomplished
• Importance of clear, hopeful vision when leading organization-wide change

3. Identifying New Leadership

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

Vestry nomination and election processes

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

What the church can learn from community organizing

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

4. Stewardship of resources

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

• Fiduciary
  • Ensuring proper asset and financial management and oversight
  • Salary and benefits for clergy and lay staff
  • Clergy responsibility & accountability

Frequently carried out through

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

Liability (vestry insured?)

• Violation or neglect of fiduciary responsibilities, contracts, or any other legal agreements (employment, wrongful termination, etc.)
Vestries’ role changes depending on church size

The Family Church: 0-50
The Pastoral Church: 50-150
The Program Church: 150-350
The Corporation Church: 350-500+


Questions?

Tools and resources for vestries

ECF Vital Practices

Tools and resources for vestries

The Episcopal Church Office of Research

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

Information Available

• Parish Report (Membership, Average Sunday Attendance and Pledge & Plate) most recently available eleven years
• Community Profile (3 mile radius of your congregation) with 12 demographic insights including population, age, and household statistics and trends.
Next Steps: In the next few months...

• What is one thing that the your vestry can do to prioritize discernment/formation?
• How might the vestry either 1) dust off 2) revise or 3) better communicate its mission and vision statements?
• What needs to be done to strengthen the process for identifying people with the potential for leadership? How can the vestry provide a discernment process and clarify expectations?
• Should there be group norms and, if so, how will people be held accountable to those norms?

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Part II: Three Essential Ingredients for Vital Teams

Three essential ingredients for Vital Teams

• Strong relationships
• Clear processes
• Focus on results
Discussion on building strong relationships

- How do vestry members get to know one another?
- How are new vestry members oriented and incorporated into the whole group?
- Does your vestry hold regular retreats? What is the focus of these retreats?
- Effective teams are built on strong trust and relationships with one another. Why do you think this is the case?

Establishing norms for your team

- What are group norms?
- What is the benefit of establishing group norms for a vestry?
- What are some norms that you’d suggest for your vestry?

The four phases of team development

- Form
- Storm
- Norm
- Perform

Ideas for building strong relationships

- Vestry orientation retreat
- Beginning meetings with relationship building
- Learning and managing one another’s communications styles
Holding a vestry orientation retreat

Opportunity to "form" group
- Emphasis on fellowship and orientation
- Opportunity to create or revisit norms for group

From "Create a holy time away for your vestry"
- Where will it be held?
- Vestry members only?
- Who will lead it?
- How will spirituality and worship be incorporated?
- Will it be more than 24 hours?
- What should the content focus be?
- How will we name our values?
- What if there is conflict in the vestry?

“Bootstrap Your Vestry Retreat” by Loren Meade
- Anna Olson’s “Snapshot of an Urban Neighborhood” (as a way of getting to know one another and wider neighborhood)

Beginning meetings with relationship building

- Conducting a short check-in and Bible study at the beginning of each vestry meeting
- Periodically use an ice-breaker exercise to start the meeting

Learning and managing different communications styles:

- Collaborator, Contributor, Director, Inquisitor
- The Controller, The Analyzer, Promoter, Supporter
- Assertive, Aggressive, (Passive-aggressive) Submissive, Manipulative
Two interactive exercises

Exercise 1:
• Break into pairs and share “Why I joined the vestry.”
• The “listener” will share with the wider group what they heard.

Exercise 2:
• 3rd year vestry members answer the question “What do you wish you had known before you joined the vestry?”
• 2nd year vestry members answer the question “When you were elected last year, what did you learn from those who were already on the vestry?”
• 1st year vestry members answer the question “What do you think you need most from the rest of the vestry to do your job well?”

Questions? Comments?

Three essential ingredients for Vital Teams

• Strong relationships
• **Clear processes**
• Focus on results

Discussion on clear processes

• How does your vestry meet? (Frequency, location, length of time)
• What are the best, most life-giving parts of vestry meetings?
• What are the parts of vestry meetings that need a little work?
• Looking at last week’s agenda, what is the top item?
• What is at the very bottom of the agenda?
• How does your vestry make decisions on tough issues?
• How does your vestry handle regular reports?
Clear processes

- Running an effective meeting
- Consensus decision making
- Facilitating conversations

Running an effective meeting

“Whether we like it or not, meetings are the backbone of our congregational life. They link ideas, people, and action. Nevertheless, approximately 1/3 of meetings are considered unnecessary by people who attend them…”

– from “Backbreaking meetings” by Anne Ditzler

Who serves as meeting facilitator?

General principles:
- Follow the 1:1 rule for meeting preparation
- Define and state purpose of meeting
- Identify intended outcomes of meeting (discussion on, decision about)
- Relationships, process, results

Build a better meeting agenda

A general order for meetings:
- Purpose of meeting
- Formation (Bible study, sharing, skill building)
- Strategic items that need discussion
- Items that require a decision
- Information updates
Build a better meeting agenda

Two additional considerations:
• Using consent agendas for typical business
• Keeping unfinished business on the agenda month-to-month until completed

Interactive exercise

• Plenary discussion on prior month’s vestry agenda
• Flip chart creation of revised order for agenda

Questions? Comments?

Three essential ingredients for Vital Teams

• Strong relationships
• Clear processes
• Focus on results
Discussion on results

• How does your vestry identify its annual goals?
• How many goals has your vestry identified for this year?
• How are these goals incorporated into regular meetings?
• Does your vestry check in regularly on the progress made toward these goals?
• Does your vestry reflect periodically on how you’re doing as a team?
• Are there regular opportunities to give feedback at the individual and group level?

Focus on results

Two main areas:
• Setting goals
• Establishing feedback loops at individual and group level

Focus on results

Setting goals:
• Identify only 2-3 S.M.A.R.T. goals per year
• Ensure that these goals are aligned with mission/vision of congregation
• Revisit these goals and progress on goals at each meeting
• Management by objective method

Setting S.M.A.R.T. goals

• Identifying just 2-3 goals per year
• Use the S.M.A.R.T. method to name strong goals
  • Specific
  • Measurable
  • Assigned to
  • Realistic
  • Time specific
Developing a strategic filter for goals

When naming your top 2-3 goals, consider how they relate to:
- Mission and vision
- Uniqueness
- Financial sustainability
- Identity
- Internal capacity

Discussing goals regularly at meetings

- Add the 2-3 goals to the vestry norms sheet and have present for all members at each meeting
- Add the goals to the monthly agenda as a reminder
- Regularly discuss the goals at meetings

*Management by objective method

- Greater efficiency – through systematic procedures
- Greater motivation – through participation & planning process
- Planning for results – not work

MBO – 5 Criteria

- Prioritize objectives
- Quantify – Must be measurable
- Realistic
- Consistent – Policies and mission
- Compatible

*MBO or MBR – Management by results
Focus on results

• Establishing regular, informal feedback loops
  • At group level
  • At individual level
• Suggested questions for both group/individual feedback sessions:
  • In your opinion, how are we doing as a team?
  • Is it your sense we’re fulfilling the norms we established?
  • What has gone really well? What hasn’t?
  • What would make things go better?

Interactive exercise

• Identify one goal that your congregation has for this year
• Develop this goal until it’s S.M.A.R.T.
  • Specific
  • Measurable
  • Assigned to an individual/committee
  • Realistic
  • Time-specific

Interactive exercise

• Then, on a 1-10 scale, each individual should rate the identified goal for each of the following areas:
  • How connected is it to your mission/vision? 1-10
  • Does it enhance your congregation’s uniqueness? 1-10
  • Does it increase the financial sustainability of your congregation? 1-10
  • Is this in keeping with the identity of your congregation? 1-10
  • Does your congregation have the internal capacity to realize this goal? 1-10

• Compare results and discuss areas of difference

Part III: Identifying Next Steps
Identifying next steps

- Identify at least one practice from each of the three areas covered that you would like to improve upon over next six months
  - **Strong relationships:** Knowing the four phases of group development; beginning meetings with relationship building; holding regular team retreats; recognizing different communication styles
  - **Clear processes:** Running effective meetings; consensus decision making; facilitating conversations; building better meeting agendas
  - **Focus on results:** Use S.M.A.R.T. method to create annual goals; establish feedback loops at group and individual level

Thank You!

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