

Vestry/BC Best Practices

Beyond the canons into some best ways to live and work
together

Some norms for our time together:

- We will begin and end on time
- We are a large group, please stay muted and use the chat for additional discussion and questions
- We work from the assumption that our clergy *and* our congregations are all trying our best
- Please keep clergy, congregations, Bishop, and Diocesan leadership in your prayers

Big Idea: It's a good idea to think beyond the canonical basics when deciding how to live and work together as a Rector/Vicar and Vestry/BC. Intentionality around planning meetings, generating agendas, and setting norms and expectations will help this leadership body run smoothly.

What is the canonical role of the Vestry/Bishop's Committee?

- “agents and legal representatives of the Parish in all manners concerning its corporate property and the relations of the Parish to its clergy”
- Produce and approve a budget, make financial decisions on behalf of congregation, approve expenditures that are not included within the budget.
- Approve candidates for holy Orders
- Manage congregational relationships with Clergy (specifically Rector/Vicar/Dean/PIC)

What is the canonical role of the Rector/Vicar?

- Worship, to include music
- “spiritual jurisdiction of the parish”
- Use of property and space
- Option to preside over Vestry meetings
- The hiring and firing of staff, including other clergy

Best Practices: What we will cover

- Setting expectations
- Generating Norms
- Dealing with e-mail and other communication
- Agendas and Reports
- Planning meetings
- Retreats and Orientation
- Goal Setting and Mutual Ministry

Basic expectations for Vestry/BC members

- Members should be confirmed Episcopalians
- Invested in the life of the congregation – attend worship regularly, contribute financially, are connected to folks in the congregation
- Willing to bring forward concerns, issues, and appreciations from congregation, as elected representatives
- Prepared to be in supportive and mutual relationship with clergy person
- Ready to attend meetings, ask questions, lead and learn!

Other expectations to set before election to Vestry/BC

- How often does this group meet, and for how long?
- Is there a retreat or extra workdays?
- What is the expectation for leadership/committee work/other volunteer time outside of regular meetings?
- What happens if they cannot make a meeting?
- How are members expected to prepare for meetings, and to participate?

Generating Norms

- Norms are articulated ways we normally behave together.
- Areas to discuss with a new vestry/BC and to include in the setting of norms:
 - How will we work with time – do we start/end at stated times or is there another norm for working with timing?
 - How will we make sure all voices are heard?
 - How do we show respect to each other?
 - How will we plan together and communicate with each other?
 - What is the role of email and electronic communication vs. in-person and zoom communication?

A word about E-mail

- E-mail is incredibly useful for task oriented communications and relaying factual information
- E-mail can be a landmine when it is used to convey emotional content, and can escalate tensions when employed for discussion and decision making around issues that carry emotional freight.
- Consider creating a stated norm or policy around email communication for your vestry/BC

Agendas and Reports

- Have a stated norm for how you will work with agendas and reports
- Advance agendas help members prepare
 - Have a clearly communicated way for members to add issues to your weekly agenda
 - If you are using a consent-agenda, send it out a minimum of 5 days in advance
- Some groups like written reports for the sake of having a record and saving time, others find them to be extra work. Decide which way fits your group the best and stick to it.
- Clearly communicate deadlines for written reports and agenda items

Planning Meetings

- Have a clear leader – Rector/Vicar has the canonical right to preside but may delegate this as they choose and is appropriate
- Consider frontloading the more difficult or pressing items, so if you need to end before your agenda is complete you have taken care of top priorities
- If there are tasks that your vestry/BC struggles with, break them up.
- Include a way to connect and build relationship in every meeting – strong relationships build trust and make difficult tasks easier to bear.

Retreats and Orientation

- Many groups need some time at the beginning of their formation to build relationship, connect to vision and experience learning together.
- Consider whether your members also need orientation to the work, or to the culture of your vestry/BC.
- A retreat is able to meet relationship maintenance and task orientation needs for a group in a relatively efficient amount of time, and may also offer some needed retreat time (depending on pandemic, time, and location) for busy folks.
- Consider budget and individual circumstance before asking individuals to pay for an away retreat.

Mutual Ministry Agreements & Review

- Annual process of reviewing the relationship of mutual ministry between a Rector/Vicar and congregation as represented by the Vestry/BC
- Scope should depend on need.
- Usually involves reviewing mutual expectations and doing goal review and setting for the coming year
- Emphasis is on *mutual* ministry – doing intentional work on how the ministry relationship is going between clergy and lay leadership
- Can be helpful to get an outside facilitator for this work
- Agreements should be turned in annually to the Bishop's Office - +Greg reads and replies to every one, and often has ideas for ways we can support you in your mutual work!

D

Questions?