

Elements of Effective Vestries

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Summary

Report and analysis: Five characteristics and Three “deadly sins.”

Appendix: bibliography, summaries of research, and selected documents

Summary

Effective vestries seem to share the following characteristics:

1. A self-understanding as leaders of Christian parish ministry

- Though the vestry, rector and officers are charged canonically and legally with particular responsibilities, each member's scope of concern, as well as the life of the vestry as a whole, is the broad scope of parish ministry.
- This calls for a strategic view of the parish rather than an administrative view. The vestry delegates and avoids micro-managing.
- As a Christian community of ministry, effective vestries self-consciously cultivate personal relationships with each other and with God, treating God as active and present and involved.

2. Healthy, transparent interactions

- Opinions and feelings are freely shared without defensiveness, over-emotionalizing issues or attaching a sense of insult or attack (given or received) to differences among members.
- Discussions are frank, direct, solutions-oriented, and focused on the pertinent issue at hand.

3. Mutual Accountability and Clarity of Expectations

- Leaders and the vestry at large are comfortable with accountability to each other.
- Structures are in place for mutual ministry review between rector, staff, vestry and ministries based on clear, mutually established expectations.
- The Vestry (including the rector) interacts based on clear expectations of group norms.

4. A healthy rector who models these traits and nurtures them among the vestry.

5. Processes and structures that nurture unity, positive interactions and "productive" meetings.

- Group norms that outline specific behaviors expected or discouraged.
- Clarity about the process of discussing agenda items. Discussion norms foster issue-oriented discussion, rather than parliamentary jockeying. Issues are clearly differentiated between those presented for information to the vestry, those seeking the vestry's advice, or those requiring action by the vestry.
- Understand deliberations as a group discernment process, grounding the work in the common seeking of God's voice. Avoid votes unless legally or canonically required.
- Focused agenda prepared in advance.
- Reports issued in advance so that meeting time is spent on the implications of reports rather than reporting.

Preface

During the summer of 2003, I was assigned a research project for my seminarian internship at St. Margaret's in Woodbridge, VA. Amazingly, this assignment matched an interest that had long been brewing in me to examine models of vestry life. I had, as is common, a good sense of how *not* to do vestry, but what would a *healthy* model of vestry be? What are the elements of an effective vestry, and how would one foster the development of these elements in existing vestry life?

The result was an open-ended look into vestry life, reading some literature, but mostly interviewing experienced leaders and observing several vestries in their meetings. Thus, this report is less systematic methodological research and more opinion journalism. However, I have attempted to discern trends in thinking and integrate various ideas and experiences into what I hope to be helpful reflections on vestry life. These reflections cover 'philosophies' of vestry, dynamics of interpersonal relations and structures by which vestries operate. The greatest detail lies in the section on vestry structure: the "nuts and bolts" of vestry life. A considerable amount of background and examples can also be found in the appendix of this report, drawing from interviews and documents from a variety of parishes. To all those who contributed their time and energy to this project, I give hearty thanks and great respect. I have learned more in two months than in several years of vestry experience.

In many ways, this report may be a starting point for further, more focused deliberation. To that end, I heartily invite feedback from those who read this report. What rings true? What observations clash with your experience? What resources might illuminate particular areas of interest? What God has taught you in your experiences with vestry can contribute to this project and a greater conversation about leadership development in the church. Through such conversations, we can become more faithful stewards of our roles as church leaders.

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*Vestry culture and practice of St. Margaret's was largely formed by The Rev. Dr. Sarah Chandler who retired in April, 2003. For further study, other women with leadership experience or insight include The Rev. Carol Anderson, All Saints, Beverly Hills, CA, and Dr. Diana Butler-Bass, Adjunct Professor, VTS.

Elements of Effective Vestries: report and analysis

Introduction: “Effective” vestries

What is meant by “effective” vestries and why choose this term to focus this report? By what criteria are vestries judged to be “effective?” Perhaps it is easier to articulate the problem rather than the solution. Countless parishes and vestries have experienced “bad” vestries. Meetings go on forever, but accomplish nothing. Vestry interactions are adversarial, nasty, mean-spirited, manipulative, blaming, sarcastic, defensive, negative, closed-minded and distrustful. The vestry spends more time on parliamentary procedure and arguing over process than in engaging content. Factions develop and members and leader focus on protecting turf and asserting power. The name of God is absent (unless God’s name is co-opted by a faction for their own purposes), and even more absent is concern for hearing the voice of God. The opposite extreme is only a veneer of congeniality concealing the same bitterness underneath. Perhaps a rotating-door cadre of leadership rubber-stamps decisions without engagement. Perhaps a risk-averse culture avoids making any decisions. These are the extremes that every vestry member and rector wish to avoid, but so often discover. Some vestries have healthy interpersonal relations, but nonetheless leave members feeling frustrated, with a sense that the ministry of the church is not furthered by their life together. Perhaps these negative examples help to shape the characteristics of a desirable vestry.

“Effective” vestries are effective in that they further the mission of the church: service to God, the parish and the world in furthering relationship with God and among people (discipleship and evangelism both fall into this description). As such, criteria for “effectiveness” would include grounding in God (not typically seen as a measure of effectiveness or productivity), working together as a group that builds up the group in relationship with God and with each other, and

accomplishing work which amplifies and empowers the parish to develop in Christian formation and further the work of ministry.

To some degree, such criteria produce predictable results. To have a vestry that works well together, start with people who work well together. To nurture relationship with God, integrate prayer, study and spirituality into group life. Yet despite such obvious goals, countless vestries miss the mark and still have room to grow. This report will examine five characteristics of effective vestries based on my experience and research:

1. A self-understanding as leaders of Christian parish ministry.
2. Healthy, transparent interactions.
3. Mutual accountability and clarity of expectations.
4. A healthy rector who models these traits and nurtures them among the vestry.
5. Processes and structures that nurture unity, positive interactions and “productive” meetings.

Each of these categories is rooted in both people and processes. Each characteristic indicates the kind of people that produce effective vestries, and the processes, structures and norms that both call such people forth, and equip them for effective ministry. The *content* of the vestry’s work plays a limited role in this report, though a few models will be presented. Faithful Christian ministry is assumed, as is a sense of mission and vision for the parish that is compatible with God’s calls for the church. The main questions that this report addresses are centered around effectively engaging this work and the life together upon which this work depends.

1. A self-understanding as leaders of Christian parish ministry.

Leaders of Christian Ministry

By Canon, vestries have two main responsibilities: oversight of finances and property, and choosing individuals for various parish leadership roles such as calling a rector or electing diocesan representatives or parish officers. Diocesan canons often stipulate these roles, functions, and how such elections or appointments should be carried out. Some dioceses leave determination of officers or delegates up to the parish by-laws. Vestries should be very clear on their canonical requirements, both in national and diocesan canon, and in parish by-laws. In many cases, the sole legal action of the *parish* is to elect the vestry. The vestry then makes decisions on behalf of the parish or elects others (e.g. rector, officers, delegates) to certain responsibilities.

With these very specific responsibilities so clearly delineated, and since most lay people are more familiar with managing finances and property than with parish ministry, a mindset often builds of a nuts & bolts management group, charged with the protection of the material resources of the parish. Some vestries draw members experienced on boards of directors. Such models can be very helpful in areas of group dynamics and in wise financial management. However, the church's mission to reconcile the world to God and each other is a much wider concern than the security of parish property.

Effective vestries are not separated from the ministry and spiritual life of the church, but rather integrated to it by a self-identity as leaders of Christian ministry. When such a separation occurs, the ministry of the church can be hampered by risk aversion, protectiveness of resources and an inward focus rather than generosity, ministry and an outward focus. "Where your treasure is, there will your heart be also." If the vestry focuses on property, then the parish will likely focus on property as well, often at the expense of the spiritual development of the parish and mission to

the wider community. Mutuality between clergy and vestry as leaders of parish ministry is vital to a healthy and vibrant parish faithful to God's calls.

Some Diocesan canons address this interest in integrating the scope of the vestry and clergy. Canon 12, section 2 (Diocese of Virginia) reads "Each Vestry shall cooperate with the rector or vicar in promoting the spiritual welfare of his cure and assist him in his duties as defined in General Convention Canon III 14." The Diocese of Ohio includes this mandate in its canons: "It shall be the duty of the wardens to work with the rector in establishing a climate of mutual trust and honesty within which the parish can be provided with effective leadership and its problems addressed and its mission furthered" (Title II, Canon 2, section 7 (c)).

Such mutuality requires the vestry to consider the Christian mission and ministry to and of the parish to be the vestry's concern. This does not eliminate the specific roles given to vestry, officers and the rector. The rector still has canonical authority over liturgy, staff, the use of the building, and other matters. Viewing the rector/vestry relationship based on "who controls what" will segment and factionalize the ministry of the parish, however. The reverse is certainly true: a rector will not serve the parish well by ignoring parish finances. If the rector and vestry see themselves as jointly leading parish ministry, each with appropriate responsibilities, then the life of the vestry adds vitality and strength to the ministry of the parish, and success to its mission.

Consider how such mutuality might work in particular cases where the canons might be clear. The rector almost always has hiring and firing authority over the staff. Would a wise rector make such decisions in a vacuum? Certainly not. On the other hand, should the vestry wage a battle to control the decision over who will be the next Director of Christian Education? A healthy and effective approach would involve extensive and serious dialog between the rector and vestry (and others impacted by this decision), while maintaining awareness that the final decision belongs to the rector. The same can be true of financial decisions, where the rector can play an

active role, even though the vestry has the final decision. Better yet, all parties can work together to establish clear expectations for the goals of the hiring process, or the financial matter in question. Then the rector and vestry (and others involved) are on the same page at the outset. The result is a vestry and rector working effectively together for the building up of the church and its ministry (c.f. Ephesians 4:1-16).

Leadership with a holistic, strategic view

If the vestry understands itself as a body leading parish ministry, the scope of interest moves beyond nuts and bolts and budget line items. Vestries are notorious for endlessly haggling over minutia of budgets without taking significant action for the parish. The same can be true for property decisions, e.g. what ladder should we buy? Where should we store the barbeque grill? Who should we hire to mow the grass? Effective vestries take a strategic approach. What is the vision of this parish? How is the youth ministry integrated into the life of the parish? How is God calling us to reach out to our community? The more that vestries can ask questions such as these and delegate the work of ministry itself, the more effective the vestry meeting time will be in furthering parish ministry at large. This requires moving away from “administrative,” “managing,” or “tactical” functions and toward “visioning,” “planning,” and “strategic” functions.

Big picture thinking also asks each vestry member to view his or her concern to be the entire scope of parish ministry. In many cases, especially where vestry members are leaders of particular committees or ministries, vestry members can see themselves as representatives of certain constituencies of the parish. One person sees himself or herself as the “Christian Ed person” or the “worship & music person” or the “buildings & grounds person.” Such a view can support a factionalized vestry of competing agenda. Then the question is “who wins: the ECW or the choir?” rather than “what’s the best way to handle scheduling meeting rooms?” The former is about winners and losers, control and paybacks. The latter question shifts focus to solutions for a

parish-wide benefit. Some representation and bias will always be present, but when a strategic scope is modeled by leaders and developed in the life of the vestry, ministries thrive and work together for a more integrated parish.

Holistic models of ministry

There are many models for organizing the vestry's attention that strive to insure a comprehensive view. Two models stand out from my research. The Rt. Rev. J. Clark Grew (bishop of Ohio) offers a visual model of parish ministry that begins with worship at the center, with "spokes" that branch out to areas of ministry with no particular priority: "Compassionate Caring," Youth, Education, Stewardship, Prayer and "Peace Making." "Compassionate Caring" might normally be called "pastoral care," but Bishop Grew chose this title to attempt to overcome the sense that only clergy or professional laity do pastoral care. Such caring can be an ongoing and pervasive part of parish life. "Peace Making" might normally be called "outreach," but here again, the bishop seeks to draw us into a mindset of peace making and social justice in any context. Bishop Grew suggested using this model as a way of preventing areas of ministry from slipping through the cracks. Bishop Grew noted that he did not include Evangelism on its own since "all of this [the above ministries] is evangelism."

The Rt. Rev. Mark Dyer (retired bishop of Bethlehem, PA and current professor of Theology at Virginia Seminary) used his background as a Benedictine monk to shape vestry meetings of his parish when he was rector. Bishop Dyer cites "seven signs of a living congregation" in order of priority: Prayer, Teaching, Pastoral care, Worship, Mission (outside the parish and generally oriented toward Christian social ministry), Evangelism, and Stewardship. Bishop Dyer suggests that a healthy parish should be thriving in all seven of these areas. His vestry meetings were structured exclusively to deal with each area, asking "what is the quality of

Prayer in the congregation?” and so on, through each area. Stewardship comes last to avoid bogging down meetings in budget issues (a common piece of advice from my interviews).

Challenges for small parishes

Small parishes can sometimes find challenges in this approach (thinking strategically rather than administratively). With so few people in the parish, the vestry doesn't have a wide body of well-staffed committees to whom the work can be delegated. Often, the vestry members are 80% of the committee members in the parish. Here the challenge can be two-fold. Each member is personally involved in a significant portion of the work of the parish. Each has a personal investment in the work of a particular ministry (or group of ministries). Each is also intensely involved in the details of carrying out the work. This formula can lead to vestry meetings where the details of several ministries are haggled over at great length. When the personal investment is high, people are often challenged to think on a wider parish scale and move from tactics to strategy in the vestry meeting. Building relationships of trust and a discipline of strictly avoiding micromanaging the committees can help to move such a vestry toward a more effective use of their time and energy.

Christian Community

Some parish vestries attract members of boards of trustees for non-profit organizations. Such organizations also have service to the community as their interest, and thus share traits with churches. However, the primary identity of the parish church is as a part of the body of Christ. Even a non-profit organization can develop a mentality of growth, stability and security. The mission of the church, however, often risks such security, growth and stability in some ways. The center of stability in the church should remain its fidelity to God in Christ Jesus. Such an identity impacts vestries in setting a foundation built on relationships with God and with each other. Ministries do not ultimately measure their success on numerical results or organizational

satisfaction, but in faithfulness to God. With this in mind, effective leaders of parish ministry operate with an awareness of the presence and direction of God—not a distant concept, but a living, active and involved God in relationship with the vestry. “You shall love the LORD your God with all your heart, and with all your soul and with all your strength. This is the first and greatest commandment, and the second is like it: you shall love your neighbor as yourself.” If the mission of the church is to further relationship with God and among people, the vestry should be the starting place and base for the Christian Community.

Effective vestries pray together. This does not mean adding “bookends” of prayer¹ to a business meeting, with the same impact as an invocation in the US Congress. Many vestries add bible study or a brief meditation to the beginning of the meeting, rotating leadership over the course of the year. Many include worship, or embed the whole meeting into a Eucharist, where the “business” of the meeting forms the response to scripture or perhaps the offertory. I have participated in or observed several such meetings, and I find that some formats seem to be more successful than others in establishing a context of Christian community and drawing the vestry members together in relationships of mutual trust and cooperation. While rooting a vestry’s work in scripture is an appealing concept, I have found that bible studies and meditations often act as an extended bookend to the meeting, rather than functioning as an integral part of the meeting. Often, the study carries little relevance to the ensuing discussion. In contrast, bible studies designed to be relevant to topics on the agenda could serve to manipulate the discussion behind a mask of devotion.

On the other hand, beginning with silence (contemplative prayer) and praying aloud for each other by name in specific, personal ways seemed to me to have a larger impact on the shape and feel of a meeting. St. Margaret’s in Woodbridge, VA began their meeting with several minutes

¹ A term found in *Discerning God’s Will Together* by Danny E. Morris and Charles M Olsen

of silence, calling to mind the presence of God, and quieting the internal chatter of both the day's previous events and the agenda to come. As the first step in the meeting, this practice of creating listening space for the voice of God changes the context of the vestry's work and the attitude of its members. St. Margaret's then follows with a brief period of faith sharing, connecting with individuals' current life with God. Other vestries have a "check-in" time to bring the group up to date on significant events in the lives of the members. One vestry took prayer requests at length from each member, and then prayed together for all of them. This took perhaps too long a period of time, whereas a more voluntary sharing (especially including how God is connected to the issue) yields similar results without occupying over an hour. St. David's in Ashburn, Virginia begins with a reflection led by the "vestry chaplain." The chaplain is a lay parishioner from outside the vestry who ministers to the spirituality of the vestry and is included with voice in the vestry discussions (but not vote). These efforts call attention to the presence and involvement of God, and build a small Christian community of mutual care in the context of prayer. The personal connection that can be built through these steps fosters trust and interdependence—important personal qualities for rewarding and effective relationships and meetings.

Some vestries structure their discussions to intentionally form the work of the vestry in light of discernment: what is God calling us to do? *Discerning God's Will Together* by Danny E. Morris and Charles M. Olsen presents an extensive model of discernment (see the summary of this method in the Appendix). This model is very detailed and involved, requiring a lot of time over the course of several meetings. As such, this model would be too much for regular work. The authors also seem to favor intuitive personalities so much that several steps should be streamlined and include other ways of deliberating. Waiting on God's direction does not always mean extensive delays. Their analysis would be worth reviewing for large projects, such as strategic planning or building projects or rector searches. While this structure for discernment may not

apply to average vestry meetings, effective vestries always operate with discernment of God's voice as an active and integrated aspect of their work.

For an excellent bible study applicable to vestries, read Ephesians 4:1-16. Consider the emphasis that church unity is not simply in each other or unity at any price, but *in Christ*. The author also calls various leadership roles (apostles, prophets, evangelists, pastors & teachers) to work together "speaking the truth in love" to build up the church in Christ. Ephesians calls leaders in the church to be leaders for the whole church, building up the church in the unity of Christ.

2. Healthy, transparent interactions.

A significant and common problem that vestries face is negative personal dynamics within the group. Volumes could be written on the subject. Many norms of group interaction are well known or obvious: don't be violent, insulting, don't dominate or shut off conversation, don't be accusative, make "I" statements rather than "you" statements. One accomplished rector pushes for only two criteria for vestry membership: emotional and spiritual maturity and lack of "personal agenda." How might one describe "emotional and spiritual maturity," and what are some ways to develop this in the vestry?

Transparency

One aspect of healthy interaction is transparency. Discussions are transparent when opinions and feelings are out on the table. This keeps everyone clear about where each person stands, and allows people to stay connected to each other, even when they disagree. Non-transparent interactions develop when opinions are hidden out of anxiety, fear or distrust, or when messages get sent through third parties or through innuendo or sarcasm rather than direct, plain speech. "Parking lot conversations" become the norm, and people retreat to the emotional safety of their friends, eventually forming factions. If the vestry meeting can be emotionally safe (even in

the midst of disagreement), then parking lot conversations become unnecessary, and factionalism reduces. Sometimes the fear of conflict pushes people to wage their disagreements under a mask of politeness. Such indirect speech impedes a direct response, and carries an emotional weight whose source is hard to understand. Anxiety can build in the whole group when issues are bubbling under the surface and not openly addressed. Such emotional weight unnamed can breed similar responses.

When faced with such a situation, however, one person naming the tension and asking for more clarity can diffuse a lot of the anxiety. If the other parties are willing, such transparency can lead to greater clarity, and greater connection among the group, even when differences remain. For example, consider a comment from one vestry member: “Well, yes, I suppose that the Easter worship was as good as it will ever get in *this* parish...” followed later by “we all know it’s useless to talk about the music...” Such comments don’t get at the heart of the matter, and many members might be reluctant to start a conflict with personal implications regarding the organist or the choir or the organ (the real issue is yet unclear). One response might be to ask the person directly: “what would you like to see change with the music?” Perhaps the person might launch into a personal vendetta against the organist. Returning insult would be destructive, as would simply defending the organist on some other basis. Instead, directly address the issue: “I disagree with your assessment of the organist. When I asked to try some new hymns, we sat down and talked about a few that I liked and we sang one of them the following Sunday.”

Another way to be transparent, especially in crisis, is to name feelings and own opinions. “I feel a little defensive about this because I work so closely with the organist, but I’ll try to understand where you’re coming from.” This is much more effective than trying to understand while feeling defensive—the emotional message of one’s defensiveness carries and produces a lot of anxiety. Naming this defensiveness, however, reduces the emotional weight and allows others

to hear the attempt at understanding. Transparency also means that quieter people might need to be more forthcoming. “I feel a little uncomfortable saying this because most of the vestry feels so strongly, but I don’t like our goals in this program. Ultimately, I don’t agree with its theology.” If the group is unaware of how its decisions impact the group members, then some members might feel gradually marginalized and disconnected. Clarity from minority opinions or from normally quiet members will help themselves and the group at large. In the language of discernment, if someone is silent, the group might be missing something to which God is calling their attention.

Self-Differentiation: not being emotionally “hooked” by others

A few important concepts of interpersonal interaction come from family systems theory, famously applied to the church by Edwin Friedman in his book *Generation to Generation*. My understanding is somewhat limited, but discussion of this theory is widely popular among clergy. Family systems theory can be very complex, but it would be helpful to take a simplified look at a few key concepts. Friedman is famous for his use of the term “self-differentiation.” I believe that the key aspect of differentiation involves staying connected to other people without being “hooked” by their emotional process. One can be differentiated from an issue or idea as well. For example, when someone disagrees with your ideas, you don’t react as if you yourself are being attacked. In groups, highly emotional people often set and control the agenda. They raise the anxiety level of the group and cause the group to react to them. A well-differentiated group will respond to the issue (or even the emotion) without allowing the emotional content to control the discussion or the response. Someone might be enraged at the anthem sung on Sunday. Getting “hooked” by the other person’s rage would mean responding by being defensive in a counter attack for the person’s unreasonableness or perhaps by shutting down and disconnecting. Friedman’s “differentiated” response might be to say calmly “I actually enjoyed the anthem.” A non-anxious response can diffuse the anxiety and clarify your side of the discussion, focusing the

conversation on the substance of the issue, enabling the group to move toward a solution with everyone's involvement.

Triangles

Another common problem is sometimes called "triangulation." For example, "Some people are complaining about the youth group..." This raises anxiety of who these "some people" might be and how widespread the problem is and what the problem might be. In contrast, consider saying, "I am concerned with the choice of movies that the Youth group rented last week."

Another way this works is when a parishioner comes to a vestry member saying, "I can't stand the way the rector leads the bible study." If the vestry member goes to the rector, the vestry member then becomes a third person in between the rector and parishioner. This inhibits clear communication between the two and raises anxiety in all three parties. Such "triangles" can be dismantled by asking the person to speak directly to the rector and declining to claim the role of intermediary.

Dealing frankly with emotionally charged issues can be a challenging task, especially when one is personally invested in something connected with the issue. When going into this territory, one can guard against being emotionally "hooked" by emotions by checking assumptions involved in one's response. "Is he really insulting me, or am I just particularly sensitive or invested in this issue?" "Is this person really challenging my authority to make this decision, or is she simply explaining her disagreement about the decision itself?" Better yet: "What can I learn from this person, even though we disagree?"

Interpersonal dynamics are complex and extensive, but the more that vestries work on them by developing norms and growing personal relationships, the more effective the vestry will become. The parish whose recruitment priorities are simply "emotionally and spiritually mature

and lacking personal agenda” recruits nominees for membership based not on skills, but on traits, on the ability to contribute to a healthy group process as it leads parish ministry. Emotionally and spiritually mature people tend to accept accountability more readily, and thus adopt norms of engagement more effectively, responding to workshops on group dynamics at vestry retreats. Such people also attract more healthy people onto vestry. Perhaps the most important way to foster positive group dynamics is for the rector and wardens to model these practices consistently for the vestry. This leadership will yield significant dividends.

3. Mutual accountability and clarity of expectations.

Mutual Accountability is an important element in effective vestries in two ways. The first is on the level of personality. People who are comfortable with an atmosphere of accountability are less likely to react defensively to criticism and disagreement. This means that conflict, disagreement and evaluations of clergy or ministries are comfortable and productive engagements. The second is on the level of a structured system of accountability. The second relies heavily on the first, but an accountability structure, effectively implemented, can nurture a trust in the system and a higher comfort level with accountability in general.

The Rev. Dr. Ed Kryder, experienced priest and Adjunct Professor of Pastoral Theology at Virginia Seminary, teaches a course called “Mutual Accountability.” Mutual Accountability and mutual expectations are mantras for Dr. Kryder. He recommends working with people to set mutually agreed upon expectations for each other and accepting the mutual accountability implied by such a system. Thus, the rector is accountable to expectations negotiated between rector and wardens (and perhaps a clergy evaluation committee). The vestry also becomes accountable to expectations mutually agreed upon in advance. The simplest form of such an arrangement is an

employment contract. Yet expectations often include the manner in which ministry is carried out, or the emphasis of ministry.

Implementing such a system can start with recruitment of vestry nominees. If interested, a potential nominee can meet with the rector and vestry to discuss the expectations of serving. The recruit should agree to norms such as attendance at meetings and the vestry retreat (with a date specified) before he or she stands for election. Hiring of clergy and staff can go through the same process. Strategic planning can set goals for clergy and vestry and form the basis for ongoing evaluations. Such systems attempt to circumvent surprises by negotiating ahead of time what is important to everyone and what is clearly expected. Accountability is then based on a written set of expectations and based, not upon an imposed structure, but one agreed upon by all parties.

Vestries will benefit from any process that can establish greater clarity of expectations and increase the comfort level of mutual accountability within the vestry and parish leadership. Not only will everyone be “on the same page,” but each person can help others through accountability and assistance when expectations and goals run into challenges.

4. A healthy rector who models these traits and nurtures them among the vestry.

Effective vestries rely on the leadership of a rector who is emotionally and spiritually healthy and mature, grounded in God, able to lead a strategic view of ministry, empowering the vestry and others to do ministry, mutually accountable to the vestry and parish. A rector who embodies these traits will model them for the parish in all of his or her interactions, especially within the vestry meeting. The rector, as the one who presides at vestry meetings, wields a lot of influence to the shape and tenor of vestry discussions, interactions and decisions. Effective rectors thrive on healthy vestries who provide clear expectations and clear, constructive feedback on a

regular basis (not just at a once-per-year review). Such rectors breed practices that will serve the parish long after he or she retires or leaves.

Responding to trouble with the rector

Without such healthy leadership, vestries can still be effective, but their work is made more challenging by a difficult rector. The vestry would then draw on reserves of consistency, well written expectations and direct, pro-active reviews with the rector. Particular issues should be very clearly laid out, directly describing desired behaviors and undesired behaviors. This provides clearly measurable goals rather than vague, subjective judgments. If the rector will not agree to such expectations, it may be appropriate to ask for help from the bishop's office in negotiating what expectations are appropriate. If the relationship between the rector and vestry is particularly problematic, be sure to maintain clear communication with the rector, documenting for the rector (and for yourself) in writing those specific behaviors that are problematic.

By avoiding personality judgments and being specific about how certain interactions affect you, such correspondence can provide a constructive basis for change. For instance, one might write "As we discussed on Saturday, when you do X, it impacts me in this way." Certainly, caution should be taken as to what is important enough to rise to this level. "When you sneeze during Eucharist, my entire relationship with God is disrupted" would be a poor example. Consider: "When you refused for the third time to discuss the possibility of a new Youth minister, I felt shut out of an important issue for the parish. We may ultimately decide not to hire someone, but the ability to discuss the matter in vestry meeting is important to me and my two sons, and, I believe, appropriate for the vestry to discuss."

Such medicine should hopefully not be necessary. Good, healthy leadership can be sought in a search process through clarity of expectations that include accountability. Thus a healthy vestry and healthy leadership can develop together.

5. Processes and structures that nurture unity, positive interactions & “productive” meetings.

The easiest elements of vestry life to examine are the structures and norms by which vestries live and work. Each parish has its unique way of structuring the vestry, unique habits for running meetings, and other periodic functions such as vestry retreats, strategic planning and reviews.

***Vestry structure:** canons & by-laws, recruitment, election and organization.*

Canons & By-laws

The basis of the structure of vestry is found in the canons. National canons override diocesan canons, which override parish by-laws. Every parish should be familiar with the requirements set up in each of these three important documents. Some diocesan canons are very loose about vestry structure; others are very specific as to the number of members and manner of election. Vestries usually range in size from 12 to 15 people, though some can be as small as 9, and one parish I interviewed had 18 people on vestry. Most rectors I interviewed indicated a preference for a smaller vestry, since the quality of group life, sense of trust and engagement is often better in a small group. Changes to the structure of vestry normally require approval by the parish at large through by-law amendment. Review and adjustment of the by-laws is an important process, especially if canons have changed, or if there are confusing or conflicting rules (e.g. is it clear who elects officers: outgoing vestry or incoming vestry?).

Some by-laws and diocesan canons (e.g. the Diocese of Washington) specify election of officers by the *parish*, but most are elected by the vestry (The Diocese of Virginia requires this). Where there is an option, I would recommend election of officers by the vestry as a way to build legitimacy for the officers in the group they are elected to lead. In some cases, canons or by-laws specify that nominees for wardens should be vestry members rather than at-large parishioners. This prevents inflating the size of vestry and may lead to greater continuity between the wardens

and the vestry members. The tradition of many parishes grants the rector the privilege of appointing the Sr. Warden while the vestry elects the Junior Warden. Such systems have advantages and disadvantages. In conflicted parishes, the rector might need the support of a friendly Senior Warden. This arrangement, however, can set up a faction from within the vestry, as well as building potential walls in the process of accountability for the rector. If both wardens are elected by the new vestry, they carry greater legitimacy as intermediaries with the rector.

Recruitment & elections

Parishes have a variety of methods for recruiting, nominating and electing new vestry members. Some avoid this process by drawing names from a hat (though legally, the parish will have to approve this nominating process by some sort of election system, even if it is by acclimation). Many parishes convene nominating committees to recruit a group of nominees that meet criteria determined by the vestry. Effective vestries set criteria to avoid nomination by a rotating door pattern or “who’s my friend?” There seem to be three schools of thought in the formal or informal criteria for vestry nominees. One school looks for demographic diversity first. Most parishes I examined consider demographics after a group of nominees are chosen, by noticing whether or not all candidates have one particular set of descriptions (e.g. all middle aged married white women). If this is so, and especially if the returning vestry members fit the same categories, then they look for candidates with similar qualifications, but whose demographics help to balance representation. No one with whom I spoke sets aggressive quotas and most seem to have a natural proportional diversity in their nominee slate without forcing the issue.

The two other models for nomination criteria are by skills and by traits. Some vestries look for a particular skill set, depending upon what the parish leadership might need in the near future. For instance, if a treasurer is soon to retire, an accountant might be recruited for vestry. Some vestries (though none that I interviewed) slot vestry seats according to areas of ministry that the

elected vestry person would coordinate. Thus, someone is nominated to serve in the “Christian Ed position on vestry.” A few rectors with whom I spoke discouraged this method, and some strongly spoke against charging each vestry member with running a segment of parish ministry. One concern was the “constituency” problem that could turn parish wide decisions into a competition for resources or emphasis between ministries. Vestry members might be liaisons to the ministries, this line of thought would say, but not in charge—not doing the work. This nurtures a broader perspective for each member, and reduces the odds of too much personal connection to one slice of ministry at the expense of the parish big picture. Notwithstanding these concerns, subdividing oversight of ministries to each vestry member is a common practice, and many healthy vestries effectively use this system. If micromanaging or ministry competition becomes an issue in a parish, consider ways in which the structure of vestry and ministry might contribute to this problem.

This line of thinking tends to join with those who recruit based on personal traits. Recall the parish whose sole criterion in recruiting vestry members is “emotionally and spiritually mature and lacking personal agenda.” Considering my enthusiasm for the vital importance of interpersonal relations, I find myself in agreement with this school of thought. If the vestry can think strategically and wisely and work well together, others in the parish with special skills can be brought in to help if need be. Thus the architect with the cranky personality can be on the building committee and advise the Junior Warden in lieu of *becoming* the Junior Warden.

Small parishes may face challenges here. Their pool of applicants is small, and everyone active enough to join the vestry is often doing the work of two or three ministries already. In this case, a small vestry (e.g. 9 members) of well-selected members can work at intentionally staying clear of micromanaging, even though they are all involved in the details. Small vestries are especially important in small parishes, where members tend to be overworked already.

Several interpersonal traits stand out as important in the process of recruiting interpersonally healthy vestry members. As discussed above, interpersonally healthy people are direct, not easily emotionally “hooked” by situations or others’ reactions. They are transparent and candid in expressing themselves. They are able to think strategically on a parish-wide scale, offering a helpful perspective without special interest thinking. They are spiritually healthy—grounded in God and the mission of the church. They are on board with the vision of the parish, but comfortably offer and receive healthy critique as well. They are committed to healthy engagement, especially in the midst of disagreement. They are solutions-oriented and comfortable with accountability. The church should not shrink from expecting such traits from its leaders.

Nominating committees are often made up of outgoing vestry members, sometimes in addition to the wardens, sometimes in addition to at-large members of the parish. Several rectors felt it important to stay uninvolved with the process so as to lend legitimacy to the process and empower the laity. One rector involved in revitalizing a parish chose to be involved in order to stress the importance of interpersonal traits as criteria. Nominations only by outgoing vestry members can lend consistency, but also to stagnation without a long-term view. Involving at-large members of the parish in the committee (including newer members) can help to draw new leadership from the congregation.

Regardless of criteria and nominating committee structure, potential nominees should be clear about what is expected of them as vestry members. Dates of vestry meetings should be determined for a year in advance, as should dates for vestry retreats. Attendance and other group norms should be spelled out in writing. Having the potential nominee sign off on the expectations in writing will help in the accountability process.

Many parishes nominate a slate of candidates equal in number to the open seats (though further nominations can always come from the floor during the parish meeting). Others allow for a

competitive election, usually by nominating candidates numbering twice the number of open seats. Each process has advantages and disadvantages. A non-competitive slate allows the nominating committee to design a balance of traits (e.g. introvert/extrovert) or skills. This balance could be skewed in a competitive election. This is a greater concern for parishes who recruit based on skills vs. traits. The disadvantage of a non-competitive slate is the potential loss of the process's legitimacy in the eyes of the parish at large. Indeed, some vestries become closed systems where outgoing buddies nominate the same buddies that nominated them a few years earlier. The disadvantage of a competitive election however, is the interpersonal effect of competition and having losers. Some parishes compete in a very healthy and friendly way; others do not handle competition well at all. In any event, those parishes with competitive elections always take great pains to recruit those not elected into other parish leadership positions. In a couple of cases, this year's "losers" are often next year's "winners," since all the nominees have been vetted in the process and are all reasonably well qualified.

Organization

A new vestry (2/3 old members and 1/3 new members and the new officers) should have an orientation session to review expectations and procedures as a group. Some vestries have orientation just for the new members, but a review for returning members would help reinforce group norms. Adjustments to group life get instituted through orientation programs. Often, the vestry next goes on retreat to build the group together and renew the outlook for the coming year (see more on retreats below under "strategic processes"). Thus, when the regular meetings start, the vestry will begin with an established and refreshed group dynamic.

Most vestries have little structure beyond the officers. Many vestries create intentional structure within the vestry that connects to the wider parish. Bishop Dyer's vestry used his seven vital signs of parish life to organize the vestry meetings and the parish ministries as well. Each

member of the vestry served as a liaison to one of the ministries, which Bishop Dyer intentionally called “task forces” rather than “committees.” This connects the task forces to the vestry such that the vision and broad ministry goals of the parish are then communicated to the task forces for implementation. Likewise, the needs and perspectives of the task forces influence the vision of the parish through vestry liaisons. Dr. Kryder’s model is similar, except that liaisons definitely chair the committees. However, his view of chairmanship suggests one who draws others in to perform the functions of the ministries—again a strategic view rather than a hands-on chair.

In the group of rectors and vestries that I investigated, the theory of loosely connecting vestry members to committees, rather than direct leadership, seemed to function well. In large parishes, the burden of committee meetings, if mandatory for vestry members, would be unreasonable since there are so many committees. In some cases, committees send representatives on a regular basis to report to the vestry. If the vestry then considers the report from a strategic standpoint, then their work is empowering and effective. If, however, the vestry discussed the details of the management of each ministry, the discussion moved to micromanaging, consuming greater time and hampering progress of the ministry itself. Thus the critical issue is not so much the structure of the vestry vis-à-vis the ministries, but how the vestry responds (strategic and delegating, or administrative and micro-managing).

Structure of Meetings: calendar, preparation, agenda, ground rules/norms, decision making.

Calendar

Vestries primarily interact and accomplish their role in the vestry meetings. The structure of these meetings can greatly impact their conduct, both in the obvious area of content, but also in the kinds of interactions that are evoked by meeting structure and norms. Many parishes become creative with their yearly calendar of when they meet. While many meet on a weekday evening,

some meet on Sunday afternoons or Saturday mornings. Evenings may be a time when people are at their worst interpersonally: tired and worn out and distracted from the day's events. Though some parishes (and their staff especially) may be worn out from Sunday morning's activities, Sunday afternoons may be a fresh and convenient time for many people to meet. However, meeting directly following worship may take parish leaders away from vital fellowship time. Saturday mornings work effectively for some parishes, finding people fresh and ready to engage each other and their common work in a timely fashion. Evenings remain most common, however. Many vestries reduce the rush of a busy evening and set a friendly context to evening meetings by eating dinner together before the meeting.

Most vestries meet monthly, though one vestry I examined meets every two months (with informal discussions on the months in between), and another meets twice monthly. The bi-monthly vestry strives for as strategic a view as possible, whereas the twice-monthly vestry tends toward administrative concerns in their discussions. Most vestries seem to plan for two-hour meetings, with many vestries incorporating dinner into evening meetings, making their time together two to three hours long. A few planned for more time than this, and many who planned for two hours often stretched their time one or two hours longer than planned. Starting and stopping meetings on time is a rule often repeated by so many church and secular leaders, yet duration and sticking to the schedule continues to vex countless vestries. Chronic violation of schedule (especially in evening meetings) drains the patience and energy of vestry members and erodes commitment in other mutually agreed norms. Rectors (and members) should be vigilant in mutual accountability to the agreed meeting times for beginning and ending.

Preparation and agenda

To accomplish this, of course, the agenda should be carefully planned in advance. The vestry cannot consider all possible issues in a two-hour time span. Many effective vestries plan

their agenda either in executive committee (rector and wardens, and possibly treasurer), or in a formally structured agenda committee. One parish's agenda committee included clergy, wardens and a rotation of three members from the vestry. Thus, each vestry member in the 15-person vestry served on the agenda committee roughly twice each year. Agenda committees then plan the agenda in a framework of a self-understanding as leaders of parish ministry with a strategic view and a relational foundation. Agenda committees can determine the issues with the most energy and place them first on the agenda.

Several rectors emphatically urged placing the budget last on the agenda, since the budget commonly consumes a great deal of time and energy without material benefit. Part of the reason for this may be the unique accounting language that governs official financial records. Many discussions often ensue due to translating the format of the report into terms clear to those inexperienced with financial accounting methods. Many parishes use a narrative budget, and report monthly according to the broad categories of this budget. Narrative budgets categorize according to ministry area or some other broad subdivision so that the pertinent questions for budget review are "Does this ministry have adequate resources, and what guidance or stewardship might be valuable to insure its success?" Full financial records can be provided for those who might be concerned about potential manipulation of accounting by such a system. Most detail questions, however, can be handled outside vestry meetings (with the treasurer, wardens, rector, or the finance or executive committee). If such concerns are not satisfactorily clarified, then the matter can eventually be brought to the vestry as an agenda item.

Regardless of the report style or format, reports (especially complicated reports such as the budget report) should be completed and distributed to vestry members well in advance of the meeting for their mandatory review *prior* to the meeting. Vestries with this discipline then use the meeting to discuss the *implications* of the report, rather than listening to the presenter read the

report itself. Furthermore, this method provides opportunities for errors and confusions to be caught and corrected or clarified in advance of the meeting. This discipline will cut enormous amounts of time reading reports and hashing out detail questions. However, implementing this as a new standard can challenge many vestries, requiring diligent accountability and coordination until the group adopts this as a more natural habit.

When setting the agenda, there should be clarity about the scope of the issue. What is to be accomplished by discussing the issue? What is the purpose or goal of bringing it before the vestry? Several rectors give clarity to such discussions by distinguishing between issues that are for information, discussion, or action. Information issues are brought to the vestry for their information where no discussion or decision is required, such as a staff report. Discussion issues are open to response and interchange among the vestry, but the action that may be taken in response to the discussion comes from someone else. For instance, the rector may seek the advice or feedback of the vestry on liturgy, but the rector ultimately makes the final decision. Likewise an open issue regarding music may create feedback that will be passed on to the choir director to handle, without the vestry attempting to micro-manage. Action issues, on the other hand, require not only report and discussion, but a decision or action from the vestry. Such actions might include a decision about the budget. Distinguishing what *type* of issue is before the vestry lends clarity to the scope and purpose of raising the issue. This also clarifies the roles and responsibilities pertinent to the discussion (e.g. is this the rector's decision or the vestry's decision or something to be delegated). Clarity about roles helps to tailor what kind of response is elicited, both in the amount of discussion, and the emotional investment in its outcome. A healthy rector and vestry will set such role clarity within a context of cooperative leadership, thereby avoiding a sense of territoriality.

Some vestries set the agenda according to a regular rotation of ministry consideration. Bishop Dyer's vestry set their agenda based on his "seven vital signs of a living congregation." Modeled after Bishop Dyer's experience in Benedictine communities, the first question would be posed: "what is the quality of prayer in the life of the congregation? How can we enhance it?" Then each person in the vestry would respond in turn. When offering critique, the member would ideally offer a solution to the issue, keeping the focus not on complaining but enhancing. Each vestry member would offer his or her comments without discussion by the larger body. When all have finished, the rector then offers what might be obvious by then: the sense of where the energy is in the vestry around the issue (prayer in this example), and where God might be calling them to go based on these comments. The interactive discussion then ensues within the focus provided by the rector.

This method ensures that each person has an opportunity to speak before the content of the conversation goes off in one direction. The rector then acts as one discerning God's call and the corporate sense of the vestry, helping to focus the discussion away from tangential issues and onto substantive, forward-looking, mission-oriented concerns. The agenda then proceeds through the other areas as time allows (prayer, teaching, pastoral care, worship, mission, evangelism, and stewardship). If these seven are not completed by the time the two hours are up, the remaining items are put off to the next vestry meeting. Meetings in this parish normally took two meetings to move through all seven areas.

Many vestries set agenda based upon the timely issues of the month, with regular reviews of areas of ministry reporting on a rotating basis. The budget is almost always reviewed each month. Several recommended putting the budget last to keep efficiency in the meeting and to keep a context of ministry leadership rather than financial protectiveness. Clarity about the scope of the

discussion (to inform, discuss or decide) will also help to keep the group on track and bring a sense of accomplishment to the meeting.

When forming the agenda, all of the above elements of effective vestry are considered. For instance, administrative issues should be clearly framed as information for the vestry, thus avoiding the vestry's micromanaging of the situation. Ministry reports should have the purpose of presenting the place of this ministry in the mission and vision of the whole parish. The agenda can also provide intentional ways to set a context of Christian community, prayer and mutual support.

Prayer in the agenda

Many vestries embed the agenda in some form of worship. One vestry varied the placement of worship to avoid some members skipping the worship part of the meeting! There are various types of prayer, study and worship used in vestry meetings (see the analysis at the end of section one above). My inclination would be to recommend beginning with extended silence, brief call to prayer, voluntary intercessions for vestry members, and collects that lay the concerns of the parish in God's hands and call to mind the vestry's life as a Christian community in the presence of God. Bible studies or meditations added at this point are most effective if they serve to guide the vestry's approach to their life together, rather than either being irrelevant or speaking to an issue before it gets raised. Amid the schedule of "business" items, issues for prayer for the parish can be included, creating an integration of business and life before God. The agenda can include forms of worship such as Eucharist or Evening Prayer if such forms serve to provide a balanced and integrated agenda in a time appropriate for the vestry's temperament and availability.

Ground rules & norms

In the meeting itself, there are various patterns of interaction or group norms by which vestries carry out their discussions. The most well known system is Roberts Rules of Order. This perennial manual of parliamentary procedure has a history of providing some sense of fairness to

multiparty deliberations in the most adversarial of contexts. Roberts Rules were not, however, designed as an aid to a small group leading Christian ministry in a parish context. Many rectors viscerally react at the prospect of using Robert's Rules due to the complex and bureaucratic method of insuring orderly and fair discussions. In my experience with vestries made up of amateur parliamentarians, Robert's Rules can become a lead weight around the neck of a vestry with any interest in a collegial relationship or discernment of God's voice. Consider the effect that "calling the question" can have on a discussion before all are heard or on-board with the issue. The sense of winners and losers is never as palpable.

Having said that, Robert's Rules do provide the default standard when all else fails, or when an issue requiring a vote is indeed adversarial. The Rules can also be locally adapted, if need be (with proper agreement). One rector uses Robert's Rules fairly strictly, but in response to the demographics of the vestry. In this parish, many on the vestry are well versed in Robert's Rules and are comfortable in this style of deliberation. Furthermore, many vestry members are CEOs of their companies, and used to being in charge. Robert's Rules helps to keep the discussion balanced and to focus the discussion on a well-crafted proposal, requiring thoughtfulness beforehand and clarity in language. Such proposal-based discussions tend to wander less and are more action-oriented.

Whether vestries strictly apply Roberts Rules or some local pattern is in place, there is perhaps more importance in *clarity* about how discussions move forward and how decisions are made. Confusion about the "rules of engagement" yields immense interpersonal and procedural damage. Consider what happens when one person's comments are cut-off on one topic due to time, only to be followed by another person offering a long speech on an item not even on the agenda. The person cut-off can easily (and justifiably) resent the uneven application of the principle of time management, leading to mistrust and division. Such anxiety then surfaces in

other disagreements, adding to the oppositional energy on the vestry. Everyone should be clear as to the norms of discussion and decision-making. Does the rector participate in discussion? Does the rector vote? Do we wait to vote until everyone is ready to vote? 2/3 of the people? Majority? On what basis are people's comments "managed" by the rector (e.g. cutting off or redirection)? Does discussion stop when a motion is made? Are anonymous third party comments allowed in discussion (e.g. "somebody told me they would revoke his pledge if we hired Sally...")?² If we slotted ten minutes for discussion, can we extend discussion, and under what conditions? In short, what are the expectations of how the meeting will proceed?

While most vestries simply follow the agenda in a comfortable pace, moderated by the rector, when the discussion breaks down or bogs down, greater clarity of expectations among the whole group can be helpful. Some vestries institute unique ways of moderating the discussion. Ed Kryder found that the tension of vestry discussions remarkably reduced when a rule was adopted that any motion made in one meeting should be discussed in that meeting, but not voted until the following meeting. This allowed the first meeting's discussion to be more free flowing and imaginative, and allowed for prayerful consideration over the course of the ensuing month before voting.

Consider Bishop Dyer's format of discussion, following his seven areas of ministry. Each person speaks first; the rector then sums up the discussion of the vestry when the mind of the vestry seems clear. If there is unclarity about the direction of the vestry in the ensuing discussion, the issue is held to the next meeting if possible. This format is unique, and requires a vestry that trusts the rector implicitly, since the rector holds a lot of interpretive power in this model, acting as the framer of the discussion. The right rector would be a marvelous facilitator to the vestry; the wrong rector could skew the interpretation to his or her position. Of course, the vestry members,

² The answer is NO! Avoid these triangles and have the third person take responsibility for the comment.

having heard all of the comments themselves, could soon notice this abuse and question the rector's interpretation.

Decision Making

Bishop Dyer also strongly avoided votes, including seeking "consensus." His concern about consensus is that one or two people can then hold up the group by their resistance, and lend to polarizing people by their positions. This view of consensus may assume polling of sides to check for rigid dissent. Another view of consensus might see the issue a bit softer, taking time to build willingness to support a course of action. One view of consensus is that most are in favor of the decision, while those who would favor a different course of action agree to support the decision of the majority.

Clearly, the rectors with whom I spoke sought some way to avoid winners and losers in the decision making process. They favored taking the time to persuade dissenters to come on board, and delaying or discouraging decisions that only had a slim majority approval. Their objective was to make decisions that were wise and unifying for the whole parish (again see the objectives of Ephesians 4:1-16). The Rev. Dr. Francis H. Wade, rector of St. Alban's, Washington D.C., suggests that in a voluntary organization, the support of 75-80% of the people is required for any measure to be effective. In the case where there are some on the losing side of a decision, pastoral follow-up is important to keep people engaged and valued and integrated in the life of the vestry. This sends a message to the whole vestry that winning or losing particular votes does not disrupt the valued place of each member. Both proponents and dissenters will benefit from this message, lest either group see the situation in terms of triumphant winners and bitter losers.

For complex and major decisions such as capital campaigns, a move of the parish, and the call of a new rector, deliberative processes that seek to intentionally discern the voice of God are crucial to maintaining the mission of the church. As mentioned above, *Discerning God's Will*

Together by Danny E. Morris and Charles M Olsen presents an extensive model of discernment that is worth examining, taking from it the segments that are helpful to the particular parish and decision.

Of course, decision-making goes much more smoothly if there is plenty of money to pay for ministries. When income reduces, the tension goes up all around the vestry, adding to the tension and energy of other discussions. I did not address this issue in great detail in my research, though my instinct, based upon my observations of the style of many effective leaders, is to keep the focus on the ministry. If the income goes down, then discern what God is calling the parish to focus on in ministry. While other spending will be cut to ensure this focus, the emphasis and energy is not primarily on cutting, but rather on building. The spiritual sense of decision-making, then, is not on death, yielding a survival-mode response of resistance, but on discernment, yielding a thriving ministry, albeit in a smaller scope or focus. The vestry then changes its sense of self from mortician to midwife.

Strategic processes: retreats, planning, leadership development, contracts, and reviews.

Retreats

Apart from the regular business of vestries, strategic processes are important to its long-term vitality and strength. Vestry retreats have become a common and important part of the life of vestries. Generally held overnight (or over the whole weekend), vestries hold a retreat as soon as possible after the election. Thus the retreat becomes the basis for vestry life through the year. My research did not look deeply into the structure of retreats, but the basic purposes on which to focus are building positive group dynamics, interpersonal closeness, group spirituality, and norms for vestry life. An orientation to the general pattern of meetings is often a helpful exercise for new and returning vestry members.

Vestry retreats can also be important occasions for long term planning, at least for considering what lies ahead in the coming year. Some vestries hold two retreats: one at the beginning of the year primarily for community building and norm setting, and the second in the middle of the year for long term planning (including preliminary budget work). This provides a sizable block of time for each task, and allows the vestry to gain experience before beginning the planning process. Many rectors recommend using an outside facilitator to run the retreat (rather than the rector) to bring freshness and a degree of objectivity to the shape of the meeting. This also allows the rector to brainstorm with the vestry without concern for managing the discussion.

Planning

Effective vestries engage in regular long-term planning. Parishes gain several benefits from the formation of parish mission or vision statements and strategic plans for developing ministries to support it. This work clarifies the basic purpose and identity of the parish for the vestry, staff, parish and outsiders (including visitors and prospective members). Many parishes lose sight of why they exist and rarely re-examine their sense of the particular mission to which God has called them. The planning process helps to re-examine and discern this calling, and plan for the structures and resources to answer it. Strategic planning involves identifying basic values and goals, and the opportunities and challenges that face the parish in the future. Discernment plays an important role in this process, both in listening to God as well as listening to the parish and the local and wider community.

Leadership Development

Long-term effectiveness depends on ongoing leadership development, both in equipping leaders and raising new ones. All too often, a set group of people perennially holds leadership roles in a parish without developing new talent and sharing these roles with new faces. An old adage says that 20% of the people do almost all of the ministry in a parish. Yet this need not be

true. Developing marginally involved members into active members, and developing active members into leaders avoids stagnation and a myopic view of parish life. Parish leaders at all levels should constantly seek out new people to be involved in parish work, and gain experience in leadership roles. This means, however, that the “old guard” must move into new roles to make room, including, perhaps, simply in the pews for a little while. While vestries rarely institute structures to do this, a culture of leadership depth in a congregation will foster this kind of thinking all the way through the ranks, fostering creativity and new energy. The most formal system for leadership development includes continuing education for clergy, staff and senior lay leaders. This will yield benefits of vitality and creativity, especially for rectors with a long tenure.

The accountability process discussed above in section three includes accountability structures such as formal contracts and regular reviews. Contracts should clarify the terms of time, benefits and expectations for the staff member, including (and especially) the rector. Expectations should describe the involvement of the rector in each area of ministry, citing certain competencies desired, and certain goals set. Competencies describe those traits necessary for effectively carrying out regular roles while Goals set specific targets for the position that are directly related to the specific vision or mission for the parish. Goals and Competencies should describe the characteristics desired in concrete terms. Expectations should be clear, mutually agreed upon, measurable, realistic and relevant to the mission and vision of the parish.

Contracts should include agreement to a review process for accountability. Reviews between rector and staff (and between wardens and the rector) should start with frank and comfortable accountability as an ongoing part of their interaction. Thus when an issue arises in a formal review process, there should be no surprises. Limiting feedback to a formal process held only once per year can yield poor snapshots of performance. One recommendation involved three evaluations: a self-evaluation, a report from an evaluation committee, and a rector evaluation. In

the case of the rector, the three include self, committee and wardens. These three evaluations are then compared and discussed among the three authors (or groups). The basis for the review is the contract itself, specifying the mutually agreed upon expectations. These evaluations should not only apply to staff, but should include the wardens as well, helping to keep the wardens and vestry accountable to expectations of them.

These systems and structures are designed to nurture unity, positive interactions and an effective, productive result from the vestry's life together, in the short term and the long term.

Avoiding trouble in the future: three “deadly sins”

There seems to be three elements that breed serious disease in vestries. In order of importance, they are:

- 1) Unhealthy interpersonal traits
- 2) Structures that hinder working together and sow distraction, dissention and distrust.
- 3) Unhealthy leaders

Unhealthy Traits

In all my interviews, I found leaders of varied caliber, a variety of vestry structures, meeting formats and strategies. All the strategies seem to attempt to draw the vestry into healthy interaction. Yet some of these strategies were polar opposites: Several accomplished rectors rejected Roberts Rules with great venom; one rector insisted on it. Both views defended their strategies based on effectiveness of their particular group. After observing some vestries with little intentionality to their format or ground rules, it became clear that starting with healthy vestry members allows the other elements to fall into place.

Starting with interpersonally *unhealthy* vestry members, however, could be the death knell, no matter how polished the meeting norms or how skilled the rector. With particularly troubled

vestries, little positive change will happen until recruitment and election processes help to provide a group of healthier people who will respond to good norms and modeling by healthy leadership. While it is possible to help existing members mature, the vestry needs a critical mass of healthy people to truly shape the group culture in a positive direction.

Structures

Healthy leaders and vestries are often hindered by the way they work together. Meetings run endlessly, confusing reports draw people into discussions of the minutia of parish business and arguments are generally over vestry procedure rather than substance. Good leadership in the meeting can solve many such issues, but good structures of clear expectations and regular accountability can demand good leadership from the rector and require solutions to chronic deficiencies. For instance, if the expectation of efficient meetings is not met, then the rector can be held to more detailed criteria for good leadership. The rector might also realize that others might have better moderating skills and choose to assign another person to preside over the discussion (one experienced rector chose this path at the outset to allow greater freedom for him to enter the discussion).

Unhealthy Leaders

Unhealthy leaders can wreck the effectiveness of vestries. Unhealthy rectors can infuse a sense of competing agenda, distrust, factionalism, manipulation and adversarial process into a vestry. Unhealthy rectors (primarily those concerned with their own control over the vestry) can undo effective group norms in order to shore up his or her own power. However, I place this disease last in my list since healthy vestry members would resist being hooked by the emotional content of the discussion and would confront vagueness and innuendo to bring greater transparency. Furthermore, structures of accountability, faithfully used, would provide a check on such abuses. With clear expectations and a system of accountability used properly, methodically,

patiently and transparently, even particularly pathological leaders would either face reform or a rather well-documented case for the bishop's intervention. If a parish has a system of expectations and accountability in place and uses it in the search process, such extreme cases can be avoided entirely.

Healthy leaders, on the other hand, who are willing to work patiently for long-term change, can often (not always) slowly work back through the system to build a healthy, effective vestry. An interpersonally healthy rector will first of all model transparent and above-board relationships to the church, nurturing such interactions among laity. Unless the vestry or parish leadership is remarkably iron-clad (and it sometimes can be), structures can slowly be integrated into the life of the parish and vestry that move away from adversarial relations to a more collaborative pattern. Recruitment of new members can focus on interpersonal traits rather than skills or political standing and meetings can use a variety of techniques to make the best of what group culture is there.

Conclusion

Effective vestries are not born only by implementing a new format (though healthy structure can help). These elements of effective vestries are built on lives and a group life that is well grounded in God, embracing the best of Christian virtues, mutually interdependent, holding together patience and accountability, speaking the truth in love, and structuring their common life together to build up the church in Christ. The more that vestries and clergy embrace these principles and habits, the better the chances are that all the other elements of effective vestries will fall into place and perpetuate themselves for the long term.