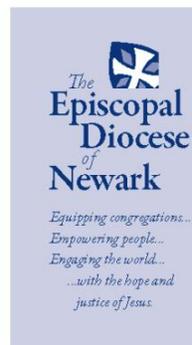


HEALTHY WAYS FOR CLERGY & VESTRIES TO WORK TOGETHER

DIOCESE OF NEWARK

VESTRY UNIVERSITY 2014



The Rev. Canon Gregory A. Jacobs
Canon to the Ordinary & Chief of Staff

31 Mulberry Street, Newark, NJ 07102
973-430-9900
gjacobs@dioceseofnewark.org
www.dioceseofnewark.org

Maintaining Healthy Clergy-Vestry Relationships

Vestry University 2014

Why Are We Offering This Workshop?

A true story: Both wardens in one of our congregations asked to see me about some "difficulties" they were having with the rector. "The rector doesn't respect the wardens or the vestry". "The rector makes decisions without consulting us". "The rector's working motto seems to be "it's my way or the highway' ". One of the wardens candidly confessed, we don't communicate, we avoid one another". And on and on it went for a good ½ hour.

After the wardens had recited their list of "Sins the Rector has committed", I innocently observed: "All that you say may be true, well and good, but my friends, it takes two to tango, and I `m not hearing what you are doing proactively to deal with this issue". And when we dug deeper, we unearthed a congregational culture that had been perennially characterized by non-communication between clergy, wardens and vestry, triangulating as the chosen method of communicating, and an utter lack of respect for one another evidenced in even the simplest conversations.

Truth be told, this is by no means an isolated occurrence in our diocese. The Bishop's Office in the past few years has had to intervene in more than a few instances where there was a total breakdown in the relationship between lay leaders and clergy. Many of these situations, sadly enough could have been avoided had the clergy and the leadership put in place some healthy practices that promoted open, honest, and healthy behaviors among one another. Too frequently, a culture of suspicion, disrespect, and intimidation had infected the congregation years before, and the clergy and lay leadership were merely the latest actors in the parish tragedy.

So the question of moment is: How do we promote healthy relationship among ourselves and with our clergy?

How do we go about working proactively to develop good professional and personal relationships among one another?

And by the way, it takes both.

The goal of both clergy and lay leaders must be to mutually support and empower one another's ministries, and I stress the word "mutual". There is no "I" in the ministry that vestries and clergy are called to do together.

Only a commitment by both to a continuing process of open and candid communication, mutual ministry, congregational transparency, and trust will lead to healthy working relationships. At bottom is a fundamental understanding of the entire leadership (clergy and lay) that this is truly "shared" ministry, and a commitment to engage in ministry in the spirit of Christ.

Establish Norms

As Aretha Franklin would say: It's all about R-E-S-P-E-C-T.

--See, ***RESPECT handout [A]***. There must be a mutual understanding of how we play together—Let's call them Sand Box Rules.

—"***Characteristics of Healthy Vestry/Rector Relationship***" [B].

The goal here is to set norms of conduct at the very outset. A few vestries have made it habit of reading these norms and characteristics before every meeting. One diocesan officer I spoke to recently, advocated that every congregation ought to have a code of conduct or a variation thereof beyond the Baptismal Covenant to articulate the values and expectations of its members.

Roles and Responsibilities

Too often, vestry members do not understand their roles and responsibilities or those of the clergy. You cannot create a healthy system if you are unclear about what you are to do and what is expected of you.

Handout: Duties of Rector (Canonical) [C].

In my work with vestries and clergy, the duties of the rector that frequently lead to clashes are:

- Clergy's final responsibility for music and liturgy
- Authority over parish buildings and access to them
- The direction, hiring and firing of staff

The canons also set out specific duties for vestries. ***See: Handout [D]***

Essentially, responsibility for the church buildings and grounds, finances, parish budget, and compensating clergy all rest with the vestry. **No problems here right?**

However, there is this basic reality: "Those who choose to defend their actions by resorting to the canons, have in most cases, already lost the war."

A healthy relationship between vestry and clergy can't be achieved by always trotting out the canons or parish bylaws as the final arbiter. In fact, resort to the canons by either party is a sure sign that the relationship is breaking down. So we need to come up with a set of expectations for clergy and vestries in the exercise of their ministries.

In our diocese, the Bishop has issued a document called "Responsibilities of a Priest". Using the ordination vows of the priest as a framework, it sets out the expectations our diocese has of its priests. ***See, Handout [E].***

Sadly, far too many vestry people simply don't have a clue what priests are called upon to do in their professional and personal lives. This document might be helpful in clearing up many of the misconceptions and misunderstandings that often occur when vestries don't take the time to learn and discuss these Responsibilities with their clergy.

And, for vestry's expectations and responsibilities, [The Vestry Resource Guide](#) put out by the Episcopal Church Foundation is a great resource for all vestries and clergy to "read, mark and inwardly digest".

In ***Handouts [F] and [G]***, I tried to highlight some of the most important collective and individual responsibilities of vestries and vestry members. Unfortunately, I find that far too many vestry people have little idea of what they are getting into when they agree to serve on a vestry. So, we could do worse than share these 2 handouts when recruiting new members for the vestry.

After all, our church expects our vestry members to be leaders, and leaders lead by example. So it is important that an invitation to serve on a vestry, underscores the commitment of the vestry person to congregation, vestry, and clergy. There is an implicit undertaking of the vestry person to be a role model as it were in one's relationships with clergy and lay people; in one's financial stewardship; in assuming leadership on key committees; and in one's willingness to be open and transparent in all that you do. **Any questions?**

OK. Let's talk about some practical ways that you can build healthy relationships between clergy and vestry.

1. **Be a pastor to your pastor.** Tell your clergy that you are praying for them. Drop them a card or an encouraging email. Take them to lunch.

Insist that they take time off, take vacation, go on sabbatical, and take their annual continuing education. Remind them that they don't have to be workaholics-- that the church will still carry on if they don't attend every committee meeting.

You know, some of us clergy are so wedded to our vocations, that we literally need to be told to "get a life". So insist that your clergy have a life apart from the church. Healthy relationships require that everyone bring their best healthy selves to their ministry.

2. **Treat your clergy as an equal.** This may sound strange, but too many people still put clergy on a pedestal. The beginning of a healthy relationship with your clergy starts with a basic appreciation that they are human too, and no less prone to stumble and fall than the rest of us. Unreasonable expectations (often unstated) heaped on clergy carry the seeds of untold anxiety for clergy, and of never-to-be fulfilled demands for perfection from parishioners.

By the same token, guard against treating the clergy as a servant or hired hand, or just another employee. We all need to appreciate that ministry is a unique calling, not a J-O-B. The assumption that the clergy are trained to do the congregations' bidding without complaint simply won't wash nowadays. Abuse of clergy that often rises to the level of abuse and bullying is a growing problem in the church and one worth taking note of in our congregations.

3. **Engage in ethical conduct at all times. Handout [H].**

This is taking the Sandbox Rules and putting them to work in our clergy/vestry relationships. Here, the challenge is to look beyond our own personal agendas and to be able to see the big picture.

For instance, are we committed to our own openness and transparency in all our relationships? Do we understand that even confidentiality has its limits? For example, many times a parishioner's insistence that we not share something with the rector has nothing to do with maintaining confidentiality, but in fact, invites triangulating.

Another question: Have we and the clergy worked at developing a mutual trust that translates into "having one another's back", even if we disagree? That trust requires a commitment as a vestry and clergy to communicate the same message to our congregation, resisting the temptation to editorialize, even if we are all not onboard with the decision. **Is there anything in Exhibit [H] that you would like to comment on?**

4. **Review the spiritual value of your meetings.** Most vestry and vestry committee meetings that I have attended appear as if they have no time for God. Literally, you have to look hard and long at the agenda to discover the presence of God, Jesus or the Holy Spirit.

A token prayer may be said at the outset, and then it's on to discuss business, business, business for the next two plus hours. Healthy relationships cannot take place in the church apart from God. So every meeting should begin with prayer, followed by spiritual reflection, and some modest time for personal check-in. You may also decide to read the Sand Box Rules and/or the Rules for Healthy Clergy/Vestry Relationships before getting down to business.

These exercises serve to ground everyone in the Spirit and in the core values that provide the framework for discussing church matters. Some vestries have even appointed one of their number to monitor conduct

throughout the meeting, ensuring that core values are being adhered to by all present.

Handout [I] outlines a sample agenda for clergy/warden meetings, and ***Handout [J]*** suggests some expectations in the conduct of vestry meetings.

5. **Conduct an annual mutual ministry review**

Every clergy letter of agreement provides for a mutual ministry review (MMR) that is to be performed within 6 months of the clergy's arrival and every year thereafter. You can find a complete description of an MMR on our website. If your vestry has not done an MMR with your clergy, you need to do one (quick, fast and in a hurry!). I would guesstimate that in most of the vestry-clergy conflict cases that I deal with, there has never been a mutual ministry review.

And that's a shame, because the very purpose of the MMR is for the clergy and the vestry to meet and explore together what has worked well over the past year, what hasn't, what could be done better, and what we plan to do in the coming year. All of this is done in a framework of cooperation and accountability so in each of those four areas I just mentioned, you are tracking: (1). Who all (clergy, wardens, vestry, congregation) is responsible for getting the task done?; (2). If the task was not done or completed, why not? [and what did we learn from that?] (3). Who and what might be needed to get that task done?; and (4). Who will be responsible for next year's tasks and what support will they need to get the job done.

The cost for an MMR is very modest, is led by one of our congregational consultants, takes about 3 hours to do, and most importantly, is one of our

best tools for promoting healthy relationships between vestry and clergy. The key point to stress here, is that this is truly a “**mutual**” ministry review, because it is rooted in the premise that the clergy, wardens, vestry and congregation are all equally invested in and responsible for the mission and ministry of our churches.

6. Hold an appreciative clergy performance review.

There is good news and bad news about clergy performance reviews. The good news is that if they are used appreciatively in order to celebrate what is going well and provide clear and reliable feedback about the clergy’s ministry and challenges in that ministry, they are fine. However, more often than not, performance reviews become a referendum on the clergy’s supposed short-comings—the problems and concerns that are raised overwhelm whatever good the clergy might have done. At its worst, performance reviews become the chief vehicle for getting rid of the priest who has somehow fallen out of favor with a vocal or powerful faction within the congregation.

Handout [K] provides some good advice about the reasons for doing a performance review, and what it should be designed to do. The process and procedure need to be prayerfully and carefully worked out as a cooperative exercise between the vestry and the clergy before the review is even conducted. The review itself should be objective, appreciative, and conducted more as an open, honest dialogue than a Grand Inquisition. The results should be shared in some summary form with both the vestry and the congregation after it has been discussed with the clergy and agreement reached on what will be shared.

7. Go on Vestry retreat.

Ideally, every vestry and clergy should designate an overnight on a weekend each year for purposes of both assessing and planning mission and ministry. Some vestries devote part of the retreat to doing the MMR, but the retreat should also be seen as a time for group spiritual renewal and reflection, prayer, relaxation, team building, and group socializing, in addition to vestry business. An educational component or a focus on a particular ministry initiative might also be woven into the retreat.

The aim of the retreat should be pretty obvious—it's an opportunity to devote some intentional face time to creating and building healthy relationships. If held soon after a vestry election, it also serves the purpose of orienting new members to the vestry's sandbox rules, roles and responsibilities, as well as getting to know other vestry members' passions, gifts, and interests.

RULES FOR RESPECTFUL CONVERSATION ("Sand Box Rules")

- R** Take **RESPONSIBILITY** for what you say and feel without blaming others. Use "I" statements.
- E** **EMPATHETIC** listening, allowing others to complete statements before beginning one's own.
- S** **SENSITIVITY** to differences in communication styles and to the need for all to be heard.
- P** **PONDER** what you hear and feel before you speak, allowing a moment of silence and giving space for reflection.
- E** **EXAMINE** your own assumptions and perceptions.
- C** Keep **CONFIDENTIALITY**
- T** **TOLERATE** ambiguity-- because we are **not** here to debate who is right or wrong.

IN OUR CONVERSATIONS

- We Listen----->That We Might Understand & Learn From One Another
- We Speak----->From Our Own Experience & Understanding
- We Accept----->Others' Experiences As Valid For Them
- We Honor----->Silence & The Feelings of Others
- We Learn----->There Is No Absolute Truth!

HANDOUT A

Characteristics of Healthy Vestry/Clergy Relationships

- Clergy and Vestry members are physically, emotionally, and spiritually healthy
- All understand their ministry as collaborative and cooperative (There are no Lone Rangers, Chief & Indians, or personal agendas).
- High degree of trust is expected and established through mutually-agreed upon behavioral and procedural norms.
- Decision-making is open and transparent and dedicated to building consensus.
- Each member's competence and input is acknowledged and valued. Roles and boundaries are clear, understood, and respected. Responsibilities of members are clear, understood and respected.
- Members are mutually accountable for carrying out their agreed-upon responsibilities.
- Information is shared among the members and open communication is valued and practiced.
- Confidentiality is maintained.
- Disagreements are resolved within the vestry. Clergy and Vestry members do not engage in unauthorized email, "parking lot", or personal appeals to constituents/congregation.
- A significant part of every Vestry meeting is devoted to some sort of spiritual practice.
- At least as much attention is paid to the dynamics of the meeting ("How well are we working together?") as to the outcome of the meeting ("How much got done?")

10/3/14 File. Vestry Healthy Relations

HANDOUT B

RESPONSIBILITIES OF CLERGY IN CHARGE (From the Canons of The Episcopal Church)

- Directs spiritual matters (SUBJECT TO BISHOP) & has “full direction and control of all guilds, societies, and associations” within the parish
- Has full authority/responsibility for worship and all spiritual matters
- Chairs vestry meeting
- Has authority over use of all parish buildings and access thereto
- Responsible for instruction in the Faith
- Responsible for instruction in Christian Stewardship
- Prepares persons for Baptism, Confirmation, Reception and Reaffirmation
- Announces Bishop’s visitation. With vestry, presents the parish register and reports on spiritual/temporal affairs to the Bishop.
- Maintains a discretionary fund
- Reads House of Bishops’ pastoral letters
- Records all baptisms, funerals, confirmations, and marriages
- “Final authority in the administration of matters pertaining to music”
- Reports on spiritual status of parish at Annual Meeting
- Joint responsibility (with Vestry) for filing annual parochial report
- Selects and directs all assisting clergy and staff

HANDOUT C

RESPONSIBILITIES OF VESTRY **(From the Canons of The Episcopal Church)**

- Assume responsibility for property and business interests of congregation:
 - Vestry acts as the agent and legal representative of the congregation concerning church property and relationship between congregation and the clergy
- Create and maintain congregation's budget
- Compensate clergy per diocesan compensation guidelines
- Assures payment of diocesan pledge
- Provide for an annual audit as determined by the diocese.
- Cannot sell or encumber church property without approval of Bishop (advice and consent of Standing Committee required)
- Oversees investment of parish funds
- Keep order in the church during worship
- Inform bishop of clergy vacancy, oversee call of clergy, changes in clergy compensation or terms of clergy contract
- Assist in the "furtherance of the Gospel and well-being of parish"
- Joint responsibility with rector for filing of parochial report
- Report on status of parish on Bishop's Visit

HANDOUT D

RESPONSIBILITIES OF A PRIEST IN THE DIOCESE OF NEWARK

It is the calling of the priest to “proclaim by word and deed the Gospel of Jesus Christ, and to fashion [one’s] life in accordance with its precepts.” Book of Common Prayer (BCP 531). Desiring that all clergy fully and faithfully live into their ordination vows and the canons of The Episcopal Church and the Diocese of Newark, this diocese seeks to insure that each of its presbyters engages in an active, balanced, and healthy ministry and personal life.

Every priest should faithfully live into his/her vows to be “a faithful pastor to all whom [he/she] is called to serve” and “to pattern [his/her] life (and that of his/her family, household or community) in accordance with the teachings of Christ, so that [he/she] is a wholesome example to [the]people” (BCP 532). To that end, the following expectations for priests in this Diocese are provided.

Will you respect and be guided by the pastoral direction and leadership of your bishop?

- Attendance at the Annual Convention of the Diocese of Newark.
- Attendance at the Clergy Conference and Clergy Days announced by the Bishop.
- Attendance at the service for the renewal of ordination vows and rededication held on Tuesday of Holy Week.
- Attendance at the Clergy Conversations with the Bishop or Canon to the Ordinary.
- Inform and/or seek the advice of the Bishop’s Office for any serious legal, financial, pastoral or professional matter affecting the life of the congregation or the priest.
- Announce to and prepare the congregation for the Bishop’s Visit and give information as to the state of the congregation, spiritual and temporal, in the categories requested by the Bishop.

Will you be diligent in the reading and study of the Holy Scriptures and in seeking the knowledge of such things as may make you a stronger and more able minister of Christ?

- Observe daily times for prayer, Scripture reading, and meditation or otherwise engage in some Rule of Life.
- Maintain a regular program of continuing education each year, including participation in workshops, seminars, and seminary courses designed to enhance clergy professional skills.
- Participation in an annual mutual ministry review with the wardens and vestry conducted by a facilitator from outside the congregation.
- Plan with the vestry and congregation, a periodic sabbatical for refreshment, renewal and growth.
- Participation in diocesan clergy groups as appropriate or required by letter of agreement (e.g., Fresh Start, Transition Ministry Clergy)
- Participation in CREDO and similar programs designed to promote clergy professional, vocational, and personal development.

Will you endeavor so to minister the Word of God and the sacraments of the New Covenant, that the reconciling love of Christ may be known and received?

- Ensure that all persons in the congregation receive instruction in the faith and ministry of the Church.
- Ensure that all persons in the congregation are instructed concerning Christian stewardship.
- Ensure the preparation of persons for Baptism, Confirmation, Reception, and Reaffirmation.

HANDOUT E

Will you undertake to be a faithful pastor to all whom you are called to serve, laboring together with them and your fellow ministers to build up the family of God?

- Encourage the development of “shared ministry” as the model for congregational life that seeks to hold both clergy and the people they serve accountable for that ministry, and emphasizes the partnership that must exist if that ministry is to be realized.
- Engage in creative ministry however the Holy Spirit may choose to manifest herself
- Encourage and participate in joint ministry with other diocesan congregations and clergy as well as other denominations, faith communities and community organizations.
- Encourage and work with wardens and vestry to insure compliance with the filing requirements and other mandates of the national church and diocesan canons (e.g., parochial reports, diocesan pledge, financial audit).
- Provide all information to and cooperate with the Church Pension Fund.
- Establish and maintain a clergy discretionary fund.
- Maintain the Parish Register
- Active engagement in district meetings and activities, and encouragement of lay participation in these events.
- Involvement in the life, councils, or activities of the Diocese of Newark.
- Attendance at services for the ordination of Deacons and Priests, and at the celebrations of new ministry for clergy within your district.
- Inform volunteers, lay employees and leaders of and encourage their compliance with Diocesan- required anti-racism, Safe Church, sexual harassment/exploitation prevention and similar trainings required by state law, canons or resolutions of Diocesan Convention.

Will you do your best to pattern your life [and that of your family *or* household, *or* community] in accordance with the teachings of Christ, so that you may be a wholesome example to your people?

- Practice responsible stewardship of financial resources, adopting the tithe as the minimum standard of giving, or engaging in a systematic plan of moving towards that minimum.
- Adequate attention to physical health, including responsible use of alcohol and drugs.
- Adequate attention to emotional health, seeking professional help when there is a need to do so.
- Observe the 48-hour /week time off requirement in the letter of agreement.
- Observe each year the vacation and other time off for recreation and refreshment mandated by the letter of agreement.
- Maintain regular contact with other clergy, spiritual director, and/or professional therapist.
- Spend intentional and significant time “away from the congregation” with family, friends, and /or be engaged in community activities.
- Report to the Bishop any incident or allegation that may constitute a violation of the disciplinary canons (Episcopal Church Canons, Title IV).

Mark M. Beckwith
Bishop of Newark
September 2011

CLERGY EXPECTATIONS OF THE BISHOP'S OFFICE

In the Diocese of Newark, "the Bishop's Office" is comprised of the Office of the Diocesan Bishop and the Office of the Canon to the Ordinary and their respective support staff, the Executive Assistant to the Bishop, and the Administrative Assistant for Diocesan Ministry Services.

- The Rt. Rev. Mark M. Beckwith, Bishop of Newark
973-430-9976; mbeckwith@dioceseofnewark.org
- The Rev. Canon Gregory A. Jacobs, Canon to the Ordinary & Chief of Staff
973-430-9915; gjacobs@dioceseofnewark.org
- Mrs. Kay Lark, Executive Assistant to the Bishop
973-430-9976; klark@dioceseofnewark.org
- Mr. Randy Johnson, Administrative Assistant for Diocesan Ministry Services
973-430-9906; rjohnson@dioceseofnewark.org

With respect to clergy of the diocese, it is the policy of the Office of the Bishop to provide guidance and counsel in support of a mutual desire (diocese and clergy) to promote and maintain meaningful, healthy and life-giving professional and personal lives.

Pastoral and personal matters concerning clergy should be primarily directed to the Bishop via email or phone call. In the absence of the Bishop, such matters should be directed to the Canon to the Ordinary. Please know that the Bishop's Chaplains are also available to respond to pastoral and personal needs of clergy. A list of the chaplains and other pastoral resources available to clergy may be found on our diocesan website.

Matters involving ministry discernment, deployment or ministry transition, warden/vestry matters, or congregational mission and ministry should be addressed via email or phone call to the Canon to the Ordinary.

Normally, the Bishop will only accept appointments to meet with clergy (and/or a member of a clergy person's family) or official representatives from the vestry or executive committee (usually the wardens).

With respect to internal congregational matters, the Bishop will not accept appointments to meet with lay people alone, nor encourage communications from them. In such situations, lay persons will be asked to address their concerns directly to the clergy and/or wardens of the congregation.

The Collective Responsibilities of Vestry Members

- A. To work with the Rector to help the congregation discern and carry out its God-directed mission and ministry.
- B. To create and approve the annual budget.
- C. To be the legal representative and agent of the church in the conduct of the church's affairs.
- D. Insure that all the church's business affairs are conducted in accordance with the diocesan and national canons and parish by-laws.
- E. To assist in stewardship, membership, and leadership development.
- F. To keep parishioners aware of what's going on in the church, the diocese, and the worldwide communion.
- G. To provide clergy and members of the lay pastoral ministry with information about parishioner needs.
- H. To act as liaison between the clergy, staff and the congregation.
- I. Provide adequate compensation for and evaluation of rector, staff, and lay professionals.
- J. To provide financial support and oversight for parish ministries and programs.
- K. Identify & encourage new blood" for vestry, programs, and ministries.

The Individual Commitment of Vestry and Executive Committee Members

Commitment to Provide Leadership

- Help to carry out the mission and shape the vision of the congregation: Vestry member is an agent for change and transformation
- Assumes role as leader and models leadership for the congregation.
- Challenge the parish to be what God is calling it to be
- A discipline of daily devotion and prayer.
- Should be active witnessing for the gospel; "Walking the walk..."
- "Faith in God" and an ability to live it and articulate it.
- Models stewardship of time and talent
- Should "Strive to tithe" and commit to leave bequest to the church
- Identifies and helps train future lay leaders
- Constructive participation in the deliberations of the church (congregation and diocese)

Commitment to Vestry

- Prompt and regular attendance at all vestry meetings and retreats.
- Regular and prompt attendance at church services.
- Frequent contact with your constituency and with the clergy and staff.
- Participation on vestry committees
- Adherence to vestry norms of conduct
- Basic knowledge of the parish by-laws and pertinent diocesan and national canons.
- Basic knowledge of the policies and procedures of the parish; baptism, marriage, funeral, memorials and gifts, church use
- Basic knowledge of what clergy and staff do and their letter(s) of agreement
- Basic knowledge of what parish committees and organizations do.
- Maintaining a vestry notebook; monthly meeting papers, canons, by-laws, policies & procedures, congregation newsletter
- Ability to understand church's finances and explain them to parishioners.

Commitment to Congregation

- Providing clergy and staff with information concerning parishioner concerns, needs, and issues.
- Represent parishioners to best of your ability
- Communicate, Communicate, Communicate with congregation, diocese, community, and one another
- Participation in one or more parish organizations or lay ministries of the church.
Attendance at most church functions.
- Active participation in outreach activities.

Ethical Responsibilities of Vestry Members

1. Take the broad view, representing the interests of all of the people who are served by the congregation
2. Maintain confidentiality.
3. Do not use the vestry or the congregation itself for personal gain or advantage.
4. Make decisions for the good of all, not representing any particular constituency or position within the congregation.
5. Have an open mind; do not pre-judge issues or ideas.
6. Build a community of trust, doing nothing to violate the trust of the vestry or of the entire community of faith.
7. Focus on mission and policy, not attempting to manage the day to day affairs directly.
8. Work with the Rector through direct information sharing, not through second-guessing.
9. Exercise my vestry authority as a within the confines of the vestry itself or as delegated by the vestry.

SUGGESTED AGENDA FOR CLERGY-WARDENS MEETINGS

- Prayer For Our Time Together
- Sharing Scripture (e.g., “Dwelling In The Word”)
- Personal Sharing (What’s going on in our lives?)
- Check In (Clergy and Wardens): What are the positives, the challenges, and the concerns in our congregation?
- Creating Agenda for next Vestry Meeting
 - Review minutes of prior meeting
 - Consideration of any unfinished business
 - What needs follow-up (and who will do it)?
 - Priorities for next Vestry meeting
 - New matters to be addressed
- Review of tasks to be done by clergy and wardens: What?, When?, Who?
- Prayer of Thanksgiving For Our Time Together

10/2/14 File: Clergy-Wardens Agenda

HANDOUT I

EXPECTATIONS FOR CONDUCTING VESTRY AND EXECUTIVE COMMITTEE MEETINGS

- A Vestry Notebook for each member
 - ✓ Parish by-laws
 - ✓ Diocesan canons
 - ✓ Contact information: vestry, clergy and staff
 - ✓ List of programs/ministries and chairs
 - ✓ Minutes and reports from annual meeting
 - ✓ Parochial Report
 - ✓ Monthly financial statement
 - ✓ Parish budget

THE AGENDA

- Wardens will meet with clergy prior to meeting to discuss issues and plan agenda
- Agenda, minutes of last meeting, financial reports, and meeting materials to be distributed prior to vestry meeting if at all possible
- Agenda should contain all items to be discussed (suggest providing corresponding time frame for each item) **Note:** Additional items should not be added to agenda at the meeting
- Make certain most pressing items are near the top of the agenda
- Agenda should contain time for clergy's report and wardens' report
- Financial report should be part of each agenda

THE MEETING

- Meetings held at regular intervals with sufficient notice of time and place
- All meetings should be conducted according to Robert's Rules of Order.
- Meeting should be no longer than two hours unless body of the whole expressly approves extended time.
- End on time even if parts of agenda items must be postponed
- Time limits for discussion should be observed and enforced
- Determine at outset if quorum is present: who is expected to arrive , excused absences, etc.
- Meetings should begin on time regardless of who is present
- Rector normally presides throughout the meeting unless discussion concerns sensitive issues involving clergy (e.g., performance, salary, etc.)
- In absence of clergy-in-charge, senior warden is to preside
- Written minutes must be taken by the clerk or designee at each meeting
- Minutes of prior meeting should be clear, concise and conform to agenda with pertinent documents attached
- A Treasurer's Report (written) should be presented at each meeting with appropriate documents and explanation.
- Meeting opens with prayer (Spiritual reflection or Bible Study strongly recommended). Consider time for individual check-in
- Encourage written reports (distributed ahead of time) rather than oral presentations by members
- No issue should come up for final decision if critical documents are not present. Instead request persons gather information and report back on date certain.
- Abide by meeting norms of conduct (See "Rules Of Engagement")
- End with a closing prayer

Mutual Ministry Review and Performance Review

Mutual ministry reviews and performance reviews are two separate processes. The **mutual ministry review** (MMR) is designed to occur after the first six months of a new ministry and annually thereafter. The purpose of the MMR is to examine the partnership between clergy and laity. It is intended to assess how the congregation is doing. The MMR is an opportunity to celebrate what has been done well and to identify what might be done better. The focus in the MMR is on the **common ministry** engaged by the whole community. The starting point is often the vestry/clergy relationship, but in some forms the MMR can include a congregational survey or contributions from key representative constituencies within the congregation. The MMR should be facilitated by a congregational consultant from outside the congregation in order to permit full participation by all vestry persons and to promote a fair and objective review of mutual ministry. Materials relating to MMRs are available on the diocesan website.

A **performance review** is considered to be a periodic review of an individual's performance in a given position, measured by defined job duties and roles. The aim of the performance review is to clarify job responsibilities and expectations. The review evaluates performance against agreed-upon criteria and notes areas where performance has exceeded, met, or failed to meet expectations. In the church context, the aim is to develop the unique ministry of the priest and the nurturing of new and complementary gifts. The review is most often conducted by a performance review team of vestry persons which may also include selected members of the congregation.

How are they related?

The **MMR** is uniquely dedicated to focus on the way the clergy and the vestry work together as a **team** to achieve the goals of the congregation and to fulfill the mission of the church. The clergy's **performance review** focuses on the **individual** gifts and skills that she/he brings to the congregation.

When done well, the MMR results in the members of the vestry and the clergy understanding what each must do working together to realize the agreed-upon goals of the congregation's ministry. The focus of the MMR is never on the clergy alone, but also recognizes the responsibility of the vestry to be a partner in the mission and ministry of the congregation.

Both the MMR and performance review should be built on a foundation of trust and conducted in a constructive and objective manner. The expected outcome of the MMR is an agreed-upon plan for future ministry that includes specific goals and clear responsibilities of clergy and vestry (and congregation) in meeting those goals. Each understands what their particular role is for attaining the goals and objectives. Therefore at the end of the MMR process, it should be possible for both clergy and vestry to determine where efforts need to be focused, what the roles and responsibilities of the parties (vestry, clergy and congregation) are, and what the ministry priorities will be for the coming year.

Conducting A Performance Review

Reasons to Conduct a Performance Review

- A time to celebrate and recognize what is going well
- Need to identify and address in a constructive manner ministry areas needing improvement.
- Provide clear and reliable feedback
- Strengthen relationships by sharing information
- Minimize/eliminate unrealistic expectations
- Renews personal and congregational goals and commitment

Characteristics of a Positive Performance Review

- Based on agreed-upon objective criteria and pre-established goals
- Provides opportunity for give and take in discussion
- Conducted in a supportive climate and “safe place” that helps clergy hear what is being said about the effectiveness of their ministry
- Results in clear, measurable expectations and goals
- Provides opportunity for individual development and ministry skills enhancement through continuing education, agreed time off for study, or recognized weekly “Sabbath”.

Key Steps

- Develop an agreed-upon process for conducting the review
- Form a team (vestry or vestry+congregation representatives) to conduct the review
- Conduct review on a regular cycle
- Collect and use relevant information—current , specific and attributable
- Encourage the clergy to engage in self evaluation and discernment of ministry
- Share findings and arrive at conclusions
- Agree upon specific measurable goals and objectives for next review period
- Summarize conclusions for vestry
- Enlist vestry as active supporters of the action plan

Performance Reviews and Clergy Compensation

The Diocese of Newark recommends that clergy should receive an annual merit review to determine if an increase in salary is warranted. The performance review is one element in determining the appropriate increase percentage. Other factors to be considered include:

- Scope of duties
- Length of service
- Salary paid to clergy in congregations of comparable size and ministry*

The Diocese publishes guidelines on the recommended percentage increase that equates to different levels of performance. Also available on the diocesan website is the **Clergy-in-Charge Performance Appraisal**, a sample form for vestry use.

*The Church Pension Fund publishes an annual report with compensation information by church size in each diocese at www.cpg.org/research

Additional Resources

- Clergy Performance Review Form (Diocese of Texas) www.epicenter.org
- Mutual Ministry Review for Clergy and Parishes (Diocese of Florida)
<http://www.diocesefl.org/index.php?mod=mutMinReview>

File: Mutual Ministry Review and Performance Review.docx