

“Vestries are from the Counting Room and Clergy are from the Sacristy”

Maintaining Healthy Clergy-Vestry Relationships

Vestry University Spring 2017

Why Are We Offering This Workshop?

The title of this workshop points to a reality in most congregations-- that vestries are usually are more focused on business and operations (The 4 Bs: Budgets, Buildings, Boilers, and Butts in the pews). While clergy are usually more concerned with the 4 Ms: (Ministry, Mission, Mass, and the Messiah). My point today is that despite these different church orientations, clergy and vestry have to create a working relationship based on their mutual desire to make real the Kingdom of God in the place where they are uniquely called to do ministry.

It ain't easy because we are human after all, and prone to all the foibles and frailties that humankind is heir to. Conflict is in some sense inevitable particularly in our congregations where parishioners are often passionate about church issues. But confrontation is rarely the answer. Parking lot and clandestine email conversations are clearly not the answer. And attempts to demonize or ostracize others is not the stuff of true Christian community. So we as church leaders have the responsibility of always seeing the bigger picture, recognizing that it ain't about us—but rather about keeping our hearts and minds “stayed on Jesus” as the old gospel hymn reminds us.

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 1/2 hour.

After the wardens had recited their catalog 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 was the chosen method of communicating, and an utter lack of respect for one another was evident in even their simplest conversations.

Now, I wish I could say that what happened in this congregation an isolated occurrence in our diocese. But it isn't. It's a growing trend-- In fact, the Bishop's Office has had to intervene more than a few times in recent years where there was a total breakdown in the relationship between lay leaders and the 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. Too frequently, a culture of suspicion, disrespect, and intimidation had infected the congregation years before the latest blow-up--with the clergy and lay leadership being merely the latest actors in the parish tragedy.

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

"How do we work proactively to develop good professional and personal relationships among one another?"

Here's the Deal. 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 openness and transparency, and trust will lead to healthy working relationships. At bottom must be a fundamental understanding by the entire leadership (clergy and lay) that theirs is truly a "shared" ministry, with a commitment to engage in ministry in the spirit of Christ.

So where do we start?

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**. **[Comments?]**

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

The goal here is to set norms of conduct at the very outset. I know a few vestries that have made it a habit of reading these norms and characteristics before every vestry 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 in all types of settings. So handout B might serve as a template for a code of conduct for your congregation as well as your vestry.

Roles and Responsibilities

Too often, I discover that vestry members just don't understand their roles and responsibilities or those of the clergy for that matter. You cannot create a healthy system if you are unclear about what you are supposed to be doing and what is expected of you. By the same token, vestries must also understand what clergy do.

Take a look at: ***Handout C: Duties of Clergy In Charge (Canonical)***.

In my experience with vestries and clergy, the duties of the clergy in charge 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 **[COMMENTS?]**

O.K. Let's take a look at ***Handout D—Responsibilities of Vestry***

The canons also set out specific duties for vestries. Essentially, the vestry has the primary responsibility for the church buildings and grounds, finances, parish budget, and compensating clergy. **No problems here right?**

Let me issue this warning: While the canons may set the framework for understanding roles and responsibilities, "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. When you do, it's 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.

Let's look at ***Handout E- Responsibilities of a Priest in the Diocese of Newark.***

In our diocese, the Bishop has this issued this document, using the priest's ordination vows as a framework. It sets out the expectations that our diocese has of its priests.

Sadly, far too many vestry people simply don't have a clue what priests do in their professional and personal lives. I hope 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, far less discuss these responsibilities with their clergy. A useful exercise at vestry retreat would be to use this document as a framework for discussion.

As for the vestry's expectations and responsibilities, I recommend The Vestry Resource Guide put out by the Episcopal Church Foundation as a great resource for all vestries and clergy to "read, mark and inwardly digest". How many of you are familiar with the Resource Guide?

In ***Handout F-- "Collective Responsibilities of Vestry Members"*** and ***Handout G--"The Individual Commitment of Vestry and Executive Committee Members"***, I highlight some of the most important collective and individual responsibilities of vestries and vestry members. These handouts should be included in a vestry notebook given to every vestry person.

They could also serve as job descriptions when you are recruiting new members and you get asked that inevitable question: "So, what does a vestry person do anyway?"

It's important that an invitation to serve on a vestry emphasizes a commitment to the congregation, to the vestry, and clergy. As a vestry person you will be a role model in your relationships with clergy and lay people; in your stewardship of treasure, time and talent; in assuming leadership on key committees; and in your 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.** Let your clergy know 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 insist on putting their 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 a hired hand. We should all appreciate that ministry is a unique calling, not a J-O-B. It is a vocation! The assumption that the clergy are trained to do the congregations' bidding without objecting, simply won't wash nowadays. Mistreatment 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. If you have any doubt that this is a serious problem, look at the report of our Dignity in the Workplace Task Force on our website.

3. Engage in ethical conduct at all times.

Handout H- Ethical Responsibilities of Vestry Members.

Here's where we take the Sandbox Rules and put them to work in our clergy/vestry relationships. The challenge is to look beyond our own personal agendas and to be able to see the welfare of the entire congregation.

For instance, are we committed to our own openness and transparency in all our relationships? And do we understand that even confidentiality has its limits?

For example, many times a parishioner will insist that we not share something with the clergy. But what's really going on has nothing to do with maintaining confidentiality, but in fact, invites triangulating, pulling you into the web of an unhealthy relationship.

Here's the fundamental question: Have we and the clergy worked at developing a mutual trust that translates into "having one another's back", even if we don't always see "eye to eye"? That kind of trust requires a commitment as a vestry and clergy for everyone to communicate the same message to our congregation, to resist the temptation to take it to the parking lot or to the email, even if we are not onboard with what was decided. Is there anything in Exhibit H that you would like to comment on?

4. **Review the spiritual value of your meetings.** Many vestry meetings that I attend act 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.

There may be a token prayer said at the beginning, 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 here's a suggestion:

Start every meeting with prayer, followed by spiritual reflection ("Dwelling in the Word"), and leave some modest time for personal check-in by the clergy and vestry members. You may also decide to read the Sand Box Rules out loud and/or the Rules for Healthy Clergy/Vestry Relationships before getting down to business.

These exercises are meant 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 followed by everyone.

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 finally, what we plan to do in the coming year.

All of this is done in a framework of cooperation and accountability so that in each of these four areas, you are tracking: (1). Who (clergy, wardens, vestry, or 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’s rooted in the premise that the clergy, wardens, vestry and congregation are all equally invested in and accountable 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, performance reviews 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 can 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 -- Mutual Ministry Review and Performance Review 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; learn about clergy, warden, and vestry roles and responsibilities, as well as getting to know other vestry members' passions, gifts, and interests.

Winding Up.

Well our time is nearly up. Are there any questions or comments? Thanks for coming out today. And thanks so much for all you do.