

# **VESTRY WORKBOOK**



**A four-session training course  
for Vestry members**

**Produced by Education Action  
for the  
United Diocese of Glasgow and Galloway**

## Introduction

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Vestries are vital. Their role is central and their proper functioning critical to the wellbeing of any charge. Therefore it is essential that those elected to a Vestry are properly equipped for their responsibilities. Just as all who offer a ministry of pastoral care or worship-leading in this Diocese receive training for those tasks, so too should Vestry members for theirs.

This workbook has been produced by the Education Action Group of the Diocese of Glasgow and Galloway to offer just such training within this diocese. It is intended to supplement the materials available elsewhere in the Province, namely the 'Guidance and Resources for Vestries' to be found on the Provincial web site<sup>1</sup>; Vestry members should take the time to acquaint themselves with these materials. It also draws on resources found in two different places - 'The Vestry Handbook', published by the General Synod Office in 2001<sup>2</sup> and 'Vital Vestries', a workbook on behavioural aspects of Vestry membership published by Local Collaborative Ministry in 2005 – thus making these materials more readily accessible to a wider audience.

The Workbook can be used in a variety of ways. Congregations may wish simply to give every Vestry member a copy upon election and encourage them to 'read, mark, learn and inwardly digest' the contents by themselves. More fruitfully however, Vestries - or better still, regional groupings of Vestry members - might decide to work through the contents sequentially in the manner of a training course; to this end, we have placed some of the 'foundational texts' in Appendices and arranged the training material into four 90-minute 'sessions'. The Education Action Group is very willing to offer help and guidance if the latter route is chosen, arranging for external facilitation if requested.



indicates group discussion



indicates facilitated input



indicates plenary session



indicates worship time

**5** indicates approximate number of minutes to be spent on that particular section of input

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<sup>1</sup> [www.scotland.anglican.org/index.php/organisation/](http://www.scotland.anglican.org/index.php/organisation/)

<sup>2</sup> This publication is currently undergoing revision. We thank the General Secretary of the Scottish Episcopal Church for permission to use material from it.

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### Suggested further reading

#### Readers

1. *Creating "Breadlike" Boards* Charles Olsen
2. *My top ten list of vestry responsibilities* Scott Evenbeck

*Like good stewards of the manifold grace of God,  
 serve one another with whatever gift each of you has received.  
 Whoever speaks must do so as one speaking the very words of God;  
 whoever serves must do so with the strength that God supplies,  
 so that God may be glorified in all things through Jesus Christ,  
 to him belong the glory and the power forever and ever  
 (1 Peter 4:10-11)*

*Therefore, my friends, I implore you by God's mercy to offer your very selves to him:  
 a living sacrifice, dedicated and fit for his acceptance,  
 the worship offered by mind and heart.  
 Conform no longer to the pattern of this present world,  
 but be transformed by the renewal of your minds.  
 Then you will be able to discern the will of God,  
 and to know what is good, acceptable, and perfect.  
 (Romans 12, 1-2)*

*Dear Lord,  
 we elect, but you confer authority.  
 We occupy roles, but you form hearts.  
 Help us to have the courage to lead by serving  
 and putting aside the world's easier ways.  
 Help us to emulate your apostles,  
 not as in the early days  
 when they craved power and preference,  
 but in the latter days after Calvary,  
 when they prayed only for courage and wisdom.  
 All this we ask in the name of the One  
 who led by serving and suffering.  
 Amen*

## Session 1 Vital Vestries

*Aim: to ensure that everyone is acquainted with the role - and expected behaviour of - a Vestry member.*



In small groups (3s or 4s depending on your numbers) share what you think is the purpose of a Vestry; try to come up with one short sentence summarising the group's understanding which you are prepared to share with the other groups. **5**



Plenary feedback: facilitator to jot down the main points on flip-chart paper **10**

### What is the remit of a Vestry?



To answer that question, we need to begin by looking at the foundational documents of our Church. The responsibilities of a Vestry are defined by the laws of the church, (i) the Code of Canons of the Scottish Episcopal Church', particularly Canons 35 and 60, and the (ii) Digest of Resolutions of the General Synod. Canon 35 details the responsibilities of the Vestry regarding the care, insurance, reordering and removal of church fabric and property, as seen from the following extracts.

**Facilitator to read out/summarise these, answering any questions as s/he goes. 10**

**CANON 35:** Of the structure, furniture and monuments of churches and the due care thereof

3. The Vestry with the Rector shall cause all proper and reasonable care to be taken of the places of worship within its charge, and of the furniture and ornaments thereof and shall use every endeavour to keep them decent, clean, and in good repair. The Vestry shall make provision for the adequate protection and insurance of all Church fabric and property.

#### Resolutions under Canon 35

3. The Vestry, unless the duty is placed under the constitution of the charge on Churchwardens or others, shall be responsible for seeing that a detailed inventory of all church goods and ornaments, registers and other property belonging to the charge in accordance with the print in use with the authority of the Bishops, which has been issued by the General Synod, subject to any adjustments thereof which may be approved from time to time by the Standing Committee of the General Synod, shall be prepared and kept up to date, and a copy of such inventory, amended from time to time as necessary, shall be sent by the Vestry to the Registrar of the diocese.

**CANON 60: Of Vestries**

1. The Vestry shall co-operate with and generally assist the Rector in all matters relating to the spiritual welfare of the congregation and the mission of the whole Church. subject always to the canonical rights and duties of the clergy.
2. With the Rector the Vestry shall, unless the duty is placed under the Constitution of the charge on Church Wardens or others, have the care of the property and fabric of the Church including the parsonage house or houses, halls, offices and any other properties acquired in connection with the Church and gifts and bequests, unless otherwise directed, accruing to the Church for whatever purpose, and shall see to the safe custody, maintenance, insurance use, and administration of the same.
3. The Vestry shall make such reports on and compile such inventories of the matters committed to its charge as may be prescribed by resolution, and shall take whatever steps it considers necessary or which shall be required by the Bishop in Synod for the safe custody and preservation of such reports and inventories
4. All such reports and inventories shall be made available to the Bishop when required, or to the Dean as provided in Canon 42, or by resolution thereunder, or to any Diocesan Official upon the Bishop's instruction.

The third avenue of guidance is the (iii) Constitution of the Charge. The Constitution of a congregation is the document which details the particular arrangements made for that charge's governance. It is the duty of all members of Vestries to make themselves acquainted with the terms of the Constitution of the Charge, and to see that these are adhered to. The constitution sets out, *inter alia*, the make-up of the Vestry, arrangements for re-election and the arrangements made for chairing it.

A Model Constitution is available which is intended as a guide to congregations who have no Constitution or who require to alter an existing Constitution. The new Model largely follows the format of the edition issued in the year 2000 but incorporates significant new material compliant with the Charities and Trustee Investment (Scotland) Act 2005. It has been reviewed by the Office of the Scottish Charity Regulator who has confirmed that a charge adopting the new Model would have charitable purposes and would pass the relevant parts of the charity test under the Charities Act. The Model Constitution can be found at

[www.scotland.anglican.org/media/organisation/vestry\\_resources/incumbency\\_model\\_constitution.doc](http://www.scotland.anglican.org/media/organisation/vestry_resources/incumbency_model_constitution.doc)

The sections of most relevance to Vestry membership are contained in Appendix 1.

Fourthly, it is important that all individuals holding office in the Church are aware of their responsibilities under the (iv) Charities and Trustee Investment (Scotland) Act 2005. The principal areas of compliance identified in the Act are set out in the Information Note shown on the Guidance and Resources Section of the Provincial website<sup>3</sup>; we have summarised the points of particular relevance to Vestry members in Appendix 10. OSCR (the Office of the Scottish Charity Regulator) has also published its own “Guidance for Charity Trustees” which is available from the OSCR website [www.oscr.org.uk](http://www.oscr.org.uk) - a useful resource for assistance on the legislation.

A Vestry is normally elected at the Annual Meeting (AM) of the Charge from among the Constituent Members. Office bearers, either appointed by the Vestry or elected at the Annual Meeting, should normally include the Secretary, Treasurer, Paying Officer, Gifts Secretary, Lay Representative and Alternate Lay Representative. One person may hold more than one of these offices; for further details of these roles, see the Vestry Handbook . Where the functions of the Paying Officer and/or Gifts Secretary are carried out by someone other than the Treasurer, they are functions delegated by the Treasurer. The Lay Representative, appointed under Canon 63, represents the congregation in the Diocesan Synod. The Alternate Lay Rep. acts in the absence of the Lay Rep. Normally, they are elected at the AM unless another meeting is called specifically for that purpose.



### Trust and co-leadership

A Vestry clearly plays an important part in the life of a congregation, working with the clergy in all matters relating to the spiritual welfare of the congregation, plus having responsibility with her/him for the management of the temporal affairs of the charge. Clergy and laity both have vital though different leadership roles in a congregation; this is collaborative leadership writ large. Thus one of the issues we need to address from the very beginning is that of trust; a relationship of trust and mutual respect will enable clergy and Vestry to work effectively – without that, little can be achieved.



In separate vestries (if you are doing this regionally) discuss the following questions:

***How is trust between cleric and Vestry built up?***

***What actions on the part of clergy or Vestry tend to diminish trust?***

***What might your Vestry do to develop better working relationships?*** **10**



Plenary feedback; facilitator to jot down on flip-chart the main points heard **10**

<sup>3</sup> [www.scotland.anglican.org/index.php/vestry\\_resources/category/C120/](http://www.scotland.anglican.org/index.php/vestry_resources/category/C120/) Under the section entitled ‘Charity Regulations Guidance’, the Provincial web site contains a series of documents to assist Vestry members deal with the specific requirements of the regulations. There are also links to the various pages on the OSCR website.



### Being clear about roles and responsibilities

One of the ways in which trust is built up is by everyone being very clear about their roles, the expectations of others upon them and the limits of their responsibilities. Apart from any legal obligations imposed by the documents listed on pages 5-7, the Church expects Vestries to perform other functions which are included in the list below. **The facilitator should enable the group to get an overview of the roles and responsibilities listed below<sup>4</sup>, charting up any questions/issues and addressing them as you go.**

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### Vestry responsibilities

1. Assisting and co-operating with the Clergy in matters relating to the spirituality of the congregation.
2. Ensuring that the terms of Resolution 7.6.1 of the Digest of Resolutions are implemented. The Resolution fixes the first two priorities of a Congregation to:
  - a) pay the minimum stipend and allowances for its Clergy
  - b) contribute the required amount of Diocesan and Provincial Quota.
3. Ensuring that the Code of Good Practice contained in the SEC booklet "Safeguarding Children and Young People in the Church" is adopted and implemented. Copies of the booklet and an implementation pack are available from the General Synod Office.
4. Ensuring that the Charges are aware of the requirements of the Health and Safety at Work Act, 1974. The full range of HSE priced publications can be purchased via the HSE Books website or from HSE Books at: HSE Books, PO Box 1999, Sudbury, Suffolk CO10 2WA. Tel: 01787 881165 or [www.opsi.gov.uk/](http://www.opsi.gov.uk/) Priced publications are also available from HMSO and good booksellers.
5. Complying with the requirements of the Food Safety (General Food Hygiene) Regulations 1995. All organisations which offer for sale any type of food or drink must ensure that anyone handling that food, including volunteers, undergoes hygiene training. For more details see Food Hygiene (H&S FH) in Appendix 2.
6. Notifying the Diocesan and General Synod Office, of any changes in Office Bearers.
7. Preparing a fresh mandate for the Bank, showing any new authorised signatories. It is recommended that there be more than one signatory, but the decision on how many, and who they should be in addition to the Treasurer, is for the Vestry.
8. Ensuring a proper handover of all books and records to a new office bearer.

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<sup>4</sup> Some of these responsibilities may be, and often are, delegated to sub-committees or particular office bearers, but ultimate accountability remains with the Vestry. Powers of delegation may be limited and where there is any doubt, the advice of the Registrar of the Diocese should be sought.



9. Retaining for reference an up-to-date copy of the Code of Canons, the Digest of Resolutions of the General Synod, the Charge Constitution, correspondence with the Office of the Scottish Charity Regulator (OSCR) to confirm recognition of charitable status detailing the Scottish Charity number and confirmation of Data Protection Act registration/notification, where appropriate.
10. The management of Church funds, including the raising and spending of money.
11. The approval of a firm budget for the next financial year and, if possible, the production of a draft budget for the following two years.
12. The review at Vestry meetings, of the Treasurer's report and management accounts, and of any investment valuations. There should also be a periodic review of the level of giving.
13. The review at Vestry meetings of all other office bearers' reports, as necessary.
14. The approval or otherwise, of significant payments not specifically authorised in the budget, before such payment is made.
15. The timeous payment of stipend and all Clergy costs. In the case of linked Charges, these will be shared on a mutually agreed basis.
16. The review and approval of the Annual Accounts, and preparation of the Annual Report of the Members of the Vestry for submission to the Annual Meeting comply with the Charities Accounts (Scotland) Regulations 2006.
17. The care, maintenance and security of the Church's property. (See Canons 35 and 60).
18. The preparation and approval for submission of all applications for grant-aid, including buildings and maintenance grants, as well as augmentation and travel grants.
19. Maintaining adequate insurance protection over all Church property, contents, fixtures and fittings, and employer's and public liability.
20. Ensuring that, if one employee or more (part time or full time) work in the Church premises, the requirements of the Fire Precautions (Workplace) Regulations 1997 are implemented. (For the purposes of the Regulations "employee" means a person who works under a contract of employment, whether express or implied and, if express, whether oral or in writing. A minister of religion carrying out normal parochial duties is not subject to a contract of employment and will not be an employee although the position under fire safety law has not been tested. Likewise an organist in receipt of an honorarium is not likely to be considered to be an "employee.") Churches Main Committee Circular 1998/2, "Fire Precautions Guide", provides guidance on the implementation of the Regulations: copies, at a cost of £2, can be obtained from: Churches Main Committee, Church House, Great Smith Street, London SW1P 3AZ Tel: 020 7222 1265 [www.cmainc.org.uk/](http://www.cmainc.org.uk/)
21. Ensuring compliance with the law generally in relation to Church activities.

## Clerical responsibilities

- Canon 22 states that *'subject to the rights and duties of the Bishop, responsibility for divine worship in every congregation shall rest with the Rector, and shall extend to overall control of all aspects of divine worship, including organ, music and choir. Before making any material change to the conduct of worship or form thereof, it shall be the duty of the Rector to consult with the Vestry and congregation in order to ensure that any proposed change is adequately prepared and explained, and is not unacceptable to the congregation generally.'*
- Under the Model constitution, the Rector shall, after consultation with the Vestry, have the right to appoint any Assistant Curate/s whom the Bishop may license for the work of the Charge. The stipends of stipendiary Assistant Curates shall be such as are agreed upon by the Rector and Vestry, but shall be not less than the scale approved by the General Synod for the time being.
- Under the Model constitution, the chair of a Vestry meeting, who shall have a casting as well as a deliberative vote, shall be the Rector, or in the case of his/her absence, a member elected by the Vestry. However it is perfectly proper for the Rector, as chair, to pass particular aspects of a Vestry meeting over to another with particular expertise or delegated responsibility, and for her/him to lead on a topic for that section of the agenda.
- The Code of Canons requires certain returns to be made to the Diocese. The preparation and submission to the Diocese of Annual Schedules and Lay Representatives' returns will normally be the duty of the clergy. The preparation and submission to the Synod Clerk of the annual membership and sacramental statistics for the year is also an obligation of the clergy. Likewise it is the duty of the clergy to ensure that all deeds and documents, as detailed in the Code of Canons, (Canon 61 Resolution 7), Digest of Resolutions, or the Charge Constitution, are held by the Diocesan Registrar for safe-keeping. These must include the Title deeds to all Church property and a signed copy of the current Constitution and any amendments.



In separate vestries (if you are doing this regionally) discuss the following questions:

***With which of the mandated responsibilities are you most comfortable and uncomfortable? What could the Vestry do to help its members become more secure in these responsibilities?***

***Among the joint responsibilities of Vestries and clergy, which are the strengths and which the weaknesses of your Vestry? What might be done to build on the strengths and address the weaknesses?***



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The facilitator should gather up any unanswered issues for consideration in the next session, and communicate how any flip-chart notes will be circulated.. The group may wish to conclude this first session with a time of reflection using one of the readings or the prayer on page 4, and/or a time of open prayer for the healthy functioning of their Vestry/ies. **10**

### Preparing for the next session

- **One of the questions that is often asked by Vestry members is, ‘how do we balance the spiritual and mission-related responsibilities with the managerial ones which seem to be writ so much larger in the documentation above?’ It is with that question that we shall begin next time, so you may like to ponder it beforehand.**
- **Think about a specific period in your life as a Vestry member when you felt the work you were doing in that capacity was making a significant contribution to the mission of your congregation. Note down for yourself what you did, and what others did, that made it feel such a vital time. If you are a fairly new Vestry member, think instead about a time when you, as a congregational member, saw the Vestry taking a real lead in helping your church become ‘mission-shaped’.**

**God creates the Church, and invites us to participate in the process.**

**A congregation's leaders are the stewards of that creation and hold it in trust.**

**The congregation has been given the resources needed to do the job God has called it to do.**

**Leaders identify and allocate those resources, enabling the Church to carry out its mission.**

**They also lead the congregation in celebrating and giving thanks for these resources.<sup>5</sup>**

**Speaking the truth in love  
we must grow up in every way  
into him who is the head, into Christ,  
from whom the whole body,  
joined and knit together  
by every ligament with which it is equipped,  
as each part is working properly,  
promotes the body's growth  
in building itself up in love  
(Ephesians 4, 15-16)**

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<sup>5</sup> *The Vestry Resource Guide Volume 1* The Episcopal Church Foundation New York (2005)

## Session 2 Visionary Vestries

*Aim: to ensure that vestry members are aware of their responsibility, shared with the clergy, to guide the mission of the charge, and to enlarge the range of tools used for this purpose.*

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### Mission-shaped Vestries

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One of the ways in which to marry the seemingly disparate areas of a Vestry's responsibility – those of ministry and administration - which we noted last time is to conceive of everything that a Vestry does under the overarching banner of a vision for the charge's mission. The Vestry is the body within the congregation that, with the clergy, leads the mission of the charge. It

- helps to discern the vision towards which God is drawing that particular congregation
- articulates and communicates the vision
- holds the congregation accountable for its realisation of that vision

This is not to minimise the need for Vestries to manage congregational affairs competently and professionally; that is, after all, part of their canonically-defined vocation. But such management needs to occur within a culture of discernment about what God is calling the charge to be and to do; in other words, about the mission-shaped ministry of the congregation.

The clergy and Vestry are responsible for seeing that the mission is clearly defined, communicated appropriately and regularly reviewed. A statement of the congregation's mission should:

- identify its goals
- state the populations, communities or areas the congregation is called to serve
- indicate how the goals are to be accomplished
- identify ways for the congregation to recognize progress toward the goals.

The Vestry reviews the congregation's mission, its current programmes and facilities, and plans for the future. Although the development of a strategic plan can be delegated to a subgroup, ultimately it is the clergy and Vestry that must make sure that such planning occurs, is formally adopted, and is supported. They also ensure that this plan is reviewed regularly and communicated to all members of the congregation. A periodic assessment of the needs of the congregation and wider community are also key components in determining whether to introduce, alter or eliminate a programme.



In separate Vestries (if you are doing this regionally) discuss the following questions:

***What mechanisms does your Vestry use to enable vision-building and mission? List these and be prepared to share this with the other groups.***

In plenary: share the methods that the various Vestries represented have used, outlining what has worked well and what was not so useful – and why.



Facilitator to jot down on flip-chart the main points and commit to circulating this information later 20



**Tools for mission planning:** If your Vestry has not been using any tools to enable the discernment of vision or engage in mission planning, then it will be necessary to think about how you might go about this. Some tools are listed below; choose one or two to examine: **20**

(i) In this Diocese we particularly recommend the tool of **Mission Action Planning**, an iterative



process<sup>6</sup> with four stages – Review, Choose, Plan and Act. The method enables a congregation to assess its strengths, weaknesses and the mission opportunities afforded by the changing context in which it is set, and to make appropriate plans for its immediate and longer- term future. Members of the Diocesan Mission Core Group can be invited to come and lead such a process with your Vestry so that you yourselves can then

roll out the method subsequently in the congregation. The method is well described in the following book: *How to do Mission Action Planning: A Vision-Centred Approach* Mike Chew and Mark Ireland SPCK 2009. A copy of this is available in the Mission and Ministry Library in the Diocesan Office.

(ii) Several congregations have used the course **Leading Your Church into Growth**. Again members of the Diocesan Mission Core Group are very willing to come and train a Vestry in using the short form of that course, 'Four Studies and a Party', which enables a congregation to discern its vision and plan an effective strategy for mission and growth.

(iii) A third useful tool is **Appreciative Inquiry**, dubbed 'a search engine for the positive core of a system'. Instead of focussing on the problematic side of congregational life (as is so often the tendency), AI pays attention to the *positive* so that it may become even more fruitful in the future. It uses a process of inquiry to discover people's best experiences; these are then used as the basis for imagining a future and designing processes and structures that will make the imagined future a reality. Thus the imagined future is not just a fantasy because it is grounded in the actual experiences of the people involved.

<sup>6</sup> Process for arriving at a progressively 'better' decision or a desired result by repeating the rounds of analysis or the cycle of operations

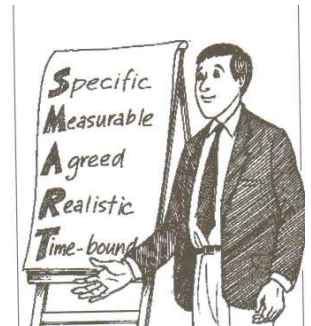
The method comprises the following five stages - you may also come across a four-stage model: 'initiate, inquire, imagine and innovate'

- 1 Define: commit to the positive; prepare and focus
- 2 Discover: interview one another to discover the times when the organisation was at its best
- 3 Dream: envisage the organisation as if the peak moments were the norm rather than the exception
- 4 Design: design ways of creating the dreamed-of organisation
- 5 Deliver: implement the changes

A longer outline of the method is contained in Appendix 3

(iv) Even using a tool as basic as '**SMART planning**' can transform the way a Vestry helps to build the congregation's mission, ensuring that the goals it sets itself are feasible, realistic and achievable in the short-term.

- Specific:** be clear about the specific goals and who the plan is for
- Measurable:** agree how you will be able to measure progress, and what criteria you will use for that
- Achievable:** ensure that the goals are possible, but involve a bit of stretch
- Resourced:** or realistic; ensure that there is sufficient human and financial resources
- Time-bound:** be clear about the timing for starting, reviewing and completing the process



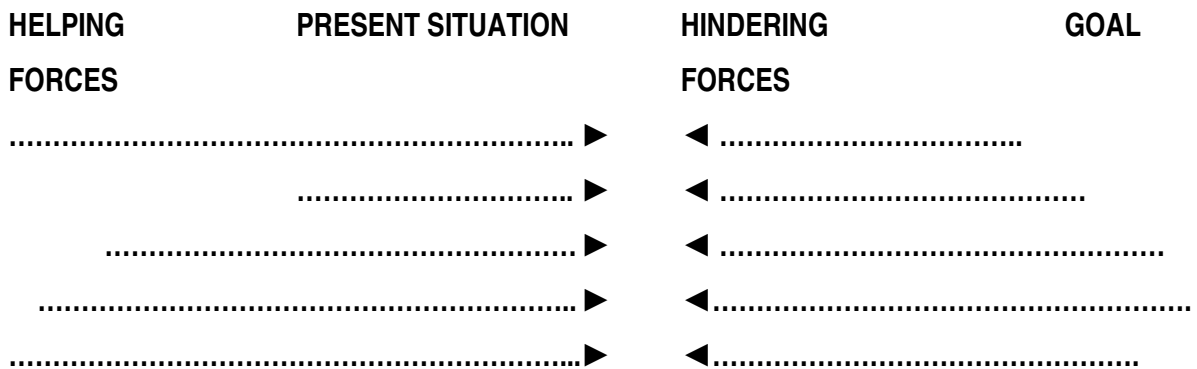
(v) Another simple but effective tool is **SWOT**, a planning process that offers a way to create a full and balanced description of the *status quo* both inside and outside the congregation. SWOT is a description of the **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (sometimes SWOC – Challenges) that face the congregation. These are the internal and external conditions that influence the congregation's condition over time. The process of planning allows a Vestry to describe these conditions in order to discern a faithful future. The SWOT analysis is most commonly graphed in the following way.

Internal Inside the congregation	<b>STRENGTHS</b>	<b>WEAKNESSES</b>
External Outside the congregation	<b>OPPORTUNITIES</b>	<b>THREATS</b>

A longer outline of the method is contained in Appendix 4

(vi) **Force Field Analysis** is a model for use when Vestries have already analysed their situation and decided on a major goal. If this goal proves to be very ambitious and not immediately attainable, then 'Force Field Analysis' can help to find *intermediate* goals which will enable the situation to be moved forward towards the overarching goal. It does this by looking at the forces which are helping to reach the goal and those which are hindering or pushing in the opposite direction.

- The Vestry draws the following diagram on flipchart paper, defining briefly the present situation and the major goal to be achieved.
- List the helping forces on the left hand side, drawing larger or shorter arrows to indicate the strength of the forces which are pushing the present situation towards the goal.
- On the right hand side list the hindering forces which prevent change or reduce its power. Again use longer or shorter arrows to indicate the strength of these forces.



One can move towards the goal either by increasing the helping forces or by weakening the hindering forces. Sometimes the more pressure that comes from the helping forces, the more resistance develops in the hindering forces. In such cases, it is often best to start by reducing the hindering forces.

- Choose either one of the helping forces which could be strengthened or one of the hindering forces which could be reduced or weakened. Taking this 'force' as the new situation, identify the goal in relation to working with this force.
- Draw a new diagram listing the helping and the hindering forces related to this new sub goal. This process can be done 2 or 3 times.

Working on the diagrams stimulates a process of intense conversation in the Vestry and helps it work out a strategy involving one or more clear sub-goals which will be concrete steps towards the major goal. (Taken from *Parish Review Resources Diocese of Ipswich and St Edmundsbury Mark Sanders*)



**In individual Vestries:**

*Discuss how you might go about introducing one of these new techniques into your practice as a Vestry/the life of the congregation. What might be the difficulties and pitfalls? What might be the benefits? How might you go about this?*

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**Plenary feedback:**

facilitator to jot down on flip-chart the main points in the discussion and commit to circulating this information after the session.

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One of the best books on this topic of strategic mission planning is *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* Gil Rendle and Alice Mann The Alban Institute 2003. It is available from the General Synod Office Library.

**Preparing for the next session**

- **Think about the skills, attributes and experience you bring to Vestry service. In answering that question, think broadly; do not limit your response to traditional work-related skills alone.**



The facilitator should gather any unanswered issues up for consideration in the next session and agree a mechanism for finding answers to any unanswered questions. The group may wish to conclude this second session with a time of reflection using one of the short Bible Studies in Appendix 5 and/or a time of open prayer about ways in which you can become a more 'visionary Vestry'.

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*In light of all this, here's what I want you to do. While I'm locked up here, a prisoner for the Master, I want you to get out there and walk - better yet, run! - on the road God called you to travel. I don't want any of you sitting around on your hands. I don't want anyone strolling off, down some path that goes nowhere. And mark that you do this with humility and discipline - not in fits and starts, but steadily, pouring yourselves out for each other in acts of love, alert at noticing differences and quick at mending fences. You were all called to travel on the same road and in the same direction, so stay together, both outwardly and inwardly. You have one Master, one faith, one baptism, one God and Father of all, who rules over all, works through all, and is present in all. Everything you are and think and do is permeated with Oneness.*

*But that doesn't mean you should all look and speak and act the same. Out of the generosity of Christ, each of us is given his own gift ..... He handed out gifts above and below, filled heaven with his gifts, filled earth with his gifts. He handed out gifts of apostle, prophet, evangelist, and pastor-teacher to train Christ's followers in skilled servant work, working within Christ's body, the church, until we're all moving rhythmically and easily with each other, efficient and graceful in response to God's Son, fully mature adults, fully developed within and without, fully alive like Christ.*

*No prolonged infancies among us, please. We'll not tolerate babes in the woods, small children who are an easy mark for impostors. God wants us to grow up, to know the whole truth and tell it in love - like Christ in everything. We take our lead from Christ, who is the source of everything we do. He keeps us in step with each other. His very breath and blood flow through us, nourishing us so that we will grow up healthy in God, robust in love.*

Ephesians 4: The Message Translation

### Session 3 Vibrant Vestries

*Aim: to ensure that vestries are operating as professionally, efficiently and courteously as they ought.*

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Spend a moment thinking of groups/committees you have belonged to. Recall the worst and the best experience. Cloudburst these memories in plenary.	<b>5</b>
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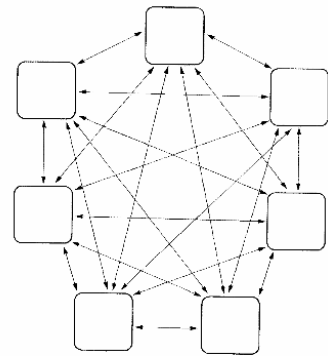
**Group needs and norms:** a Vestry is a ‘group’, and groups have certain needs and norms. We have already seen that Vestry members need to have a clear understanding of the overall purpose of a Vestry, as well as of what is expected of them as individuals. But there are many other issues; the facilitator should spend the first part of the session working through *some of the* following with the group, allowing for questions and discussion. **35**

- **Vestry members need to know how long the meeting will be.** The maximum length of a Vestry meeting should be 90 minutes; longer than that and people lose the ability to contribute efficiently, especially if the meeting is held in the evening when members have already done a day’s work. To ensure that meetings do not drag on, it is advisable to
  - (a) circulate reports in advance so that they can be taken as read and only the salient points need to be dealt with at the meeting
  - (b) it is good practice to prepare a timed agenda – i.e. allocate approximate times for each issue and mark that in the right margin. This allows a proper weighting of the agenda and means that trivia do not take over the time allotted for more substantive issues.
  - (c) ‘Matters Arising’ is a time for correction and update only
  - (d) Bids for ‘AOCB’ should be invited *at the outset* and an agreement taken by the Chair at that point as to which can be dealt in this meeting and which will need to be held over for a subsequent meeting.
  
- **Vestry members need to feel comfortable** when they are at work, as they would in any small group. They need room to work, especially room to spread out papers; they need the room to be at a comfortable temperature and be well ventilated. They need to be able to see and hear each other. They need to know not only what the parameters are concerning time-keeping, but whether late-comers will be tolerated, and whether the meeting will always start on time. If this does not happen, people will be more likely to arrive later. Time-keeping also involves finishing on time; if sessions do not finish on time, there will be an increased tendency for people to drift away.

- **Vestry members need to feel accepted, needed and included** as in any small group. We will look at some exercises that enable members to feel more comfortable each with the other in a moment, but it needs to be stressed at this juncture that knowing each others' preferred names/titles is crucial to good working. This might seem obvious, but the experience of one of the authors of this workbook is that Vestry members' knowledge of each other's names sadly cannot be taken for granted.

- **Vestry members need to understand something of their group's dynamics**

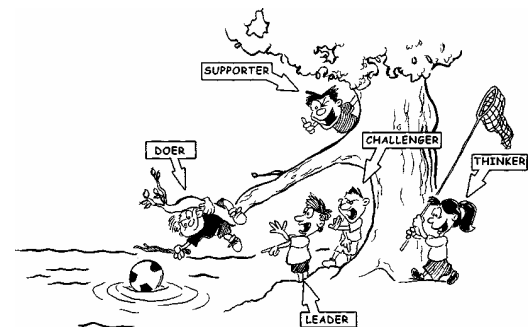
Groups are very complex. The number of possible relationships in a group can be defined mathematically by the number of people in the group multiplied by that same number minus one and the result divided by two. So, even in a Vestry of 10 members, there are 45 possible different relationships that can occur at any given time. Often Vestries get bogged down into fixed patterns of communication; if X speaks, then Y will always be the first to answer, or worse, contradict. Vestries



can ask an external observer to sit in on a meeting and draw the human interactions that take place during it; members later analyse this 'map' and receive helpful data regarding who tends to remain silent and where the main channels of antagonism and fruitful discourse lie.

- **Vestry members need to understand each other**

Many of us will have undergone a 'personality typing' exercise in the past and so have come to a better understanding of our learning style, our preferred behaviours during stress and calm, or our leadership style. One of the most helpful activities a Vestry can engage in is to take part in such an exercise *together*, for this helps members come to a better understanding of each other's personalities.



Understanding *why* someone reacts the way they do every time certain issue is raised, or responds negatively whenever a certain person speaks, is a huge step on the road to better collaborative working. There are several tools on the market to aid such enquiries, some of which are outlined on the next pages.

1. *The Learning Styles Questionnaire* Peter Honey and Alan Mumford Peter Honey Publications Ltd (2000) [www.peterhoney.com](http://www.peterhoney.com) A self-assessment questionnaire (80 questions) that helps you identify your preferred learning style(s): activist, reflector, theorist and pragmatist. The handbook also outlines those activities that will dovetail with your style and those from which you will find it more difficult to learn. Thus a 'reflector' will learn most easily when s/he is encouraged to watch think/chew over activities and allowed to reach a decision in her/his own time, but will find it more difficult when given insufficient information on which to base a conclusion. Experience has shown that understanding the foibles of one's own strongest style(s), and those of others, helps groups to co-exist - and thus work together - more easily. It is worth taking time in your group to run this analysis.

2. *The Myers-Briggs Type Indicator* [www.myersbriggs.org/my-mbti-personality-type/mbti-basics/](http://www.myersbriggs.org/my-mbti-personality-type/mbti-basics/) One of the most helpful and widely-used psychometric questionnaires, designed to measure psychological preferences in how people perceive the world and make decisions, is that developed by Isabel Myers and Katherine Briggs, first marketed in 1962. It is a non-threatening and thoroughly enjoyable way of gaining understanding about different types of personalities and how they interact with each other. It offers valuable insights into the gifts that different types of people bring to their work situation and suggests how and when they need the gifts that other people have to offer.

You have probably heard people refer to themselves by way of a number of initials e.g. INTJ; this is how the results of a MBTI analysis are depicted. If you would like to use this tool in your group, please contact the diocesan Mission Core Group which can arrange for someone to come and lead a session.

#### Dichotomies

<b>Extraversion</b>	<b>Introversion</b>
<b>Sensing</b>	<b>iNtuition</b>
<b>Thinking</b>	<b>Feeling</b>
<b>Judgment</b>	<b>Perception</b>

Malcolm Goldsmith and Michael Kindred have written a useful book which builds on the understandings of the MBTI tool. *Developing Team Work from an Understanding of Personality* 4M Publications (2002) See also *MBTI Manual; a guide to the development and use of the Myers Briggs type indicato*). Myers, Isabel Briggs; McCaulley Mary H.; Quenk, Naomi L.; Hammer, Allen L. (1998). Consulting Psychologists Press; 3rd ed edition. ISBN 0-89106-130-4.

3. *Belbin Self-Perception Inventory: Team Role Analysis* [www.belbin.com/](http://www.belbin.com/) One of the most powerful analyses was that conducted by Dr Meredith Belbin and published some twenty years ago. He maintained that whatever the task of the team, there are certain types of contribution that are needed for all decisions. Again, this is best carried out with the help of a skilled practitioner of whom there are several in the Province. For further reading see *Management Teams; Why They Succeed or Fail* R. Meredith Belbin Heinemann (1981). The nine team roles ('a tendency to behave, contribute and interrelate with others in a particular way') are summarised below:



The **Plant** tends to be highly creative and good at solving problems in unconventional ways.



The **Monitor Evaluator** is needed to provide a logical eye, make impartial judgements where required and weigh up the team's options in a dispassionate way.



**Co-ordinators** are needed to focus on the team's objectives, draw out team members and delegate work appropriately.



**Resource Investigators** provide inside knowledge and make sure that the team's ideas carry to the world outside the team.



**Implementers** are needed to plan a practical, workable strategy and carry it out as efficiently as possible.



**Completer Finishers** are most effectively used at the end of a task, to polish and scrutinise the work for errors, subjecting it to the highest standards of quality control.



**Teamworkers** help the team to gel, using their versatility to identify the work required and complete it on behalf of the team.



Challenging individuals, known as **Shapers**, provide the necessary drive to ensure that the team keeps moving and does not lose focus or momentum.



**Specialists** are individuals with in-depth knowledge of a key area.

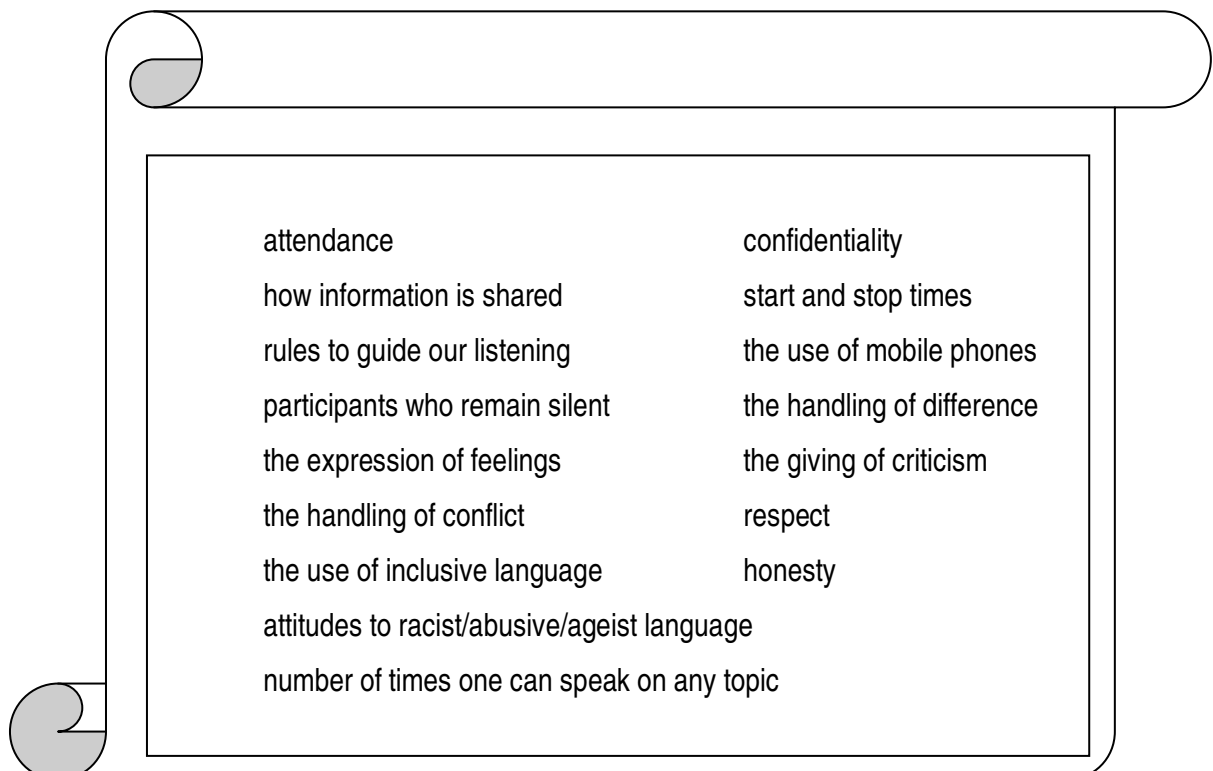
4. *Style Profile for Communication at Work* Susan Gilmore and Patrick Fraleigh Friendly Press (1992) [www.friendlypress.com](http://www.friendlypress.com) This Personal Style Profile is designed to help people understand better how they work. Style can be thought of as one's characteristic way of perceiving and thinking about yourself, others and things. If you know more about your own style preferences and the style preferences of others, you can do a better job of anticipating and coping with whatever may come your way. The questionnaire contains 20 items and you are asked to rate each of the four possible responses for every item. Each person who takes the questionnaire receives two sets of scores, one set for calm conditions when the world is characterised by the ebb and flow of ordinary stress, and one set for storm conditions when the person's world is characterised by troubled waters that signal distress. Four styles emerge 'accommodating/harmonizing'; 'analyzing/preserving'; 'achieving/directing'; 'affiliating/perfecting'. Once again there are several people in the SEC who have been trained in the administration of these tests.

5. *Enneagram* [www.enneagraminstitute.com/intro.asp](http://www.enneagraminstitute.com/intro.asp) The Enneagram is a psychological model of how individuals understand and organize their perception about experience. It identifies nine positions ('ennea' – nine in Greek) of attention that affect the ways in which each of us responds to the sacred and to others. This is yet another personality type indicator which like the other typologies describes different character types. But this one is concerned with us making a change and turning ourselves around ('conversion' or 'repentance'). It confronts us with the compulsions and laws under which we live and aims to invite us to go beyond them to take steps into the domain of freedom. For two books which place this in the setting of discernment see *The Enneagram. A Christian Perspective* Richard Rohr ssf and Andrews Evert Crossroad Publishing (2004) and *Enneagram II: Advancing Spiritual Discernment* Richard Rohr ssf Gracewing (1995).

- **Vestry members need to agree to some norms of good practice**

Any group very quickly begins to establish psychological norms: how we behave here, what is acceptable and what is not; how we treat each other; how hard we work; what kind of humour is appropriate and so on. As this phenomenon happens anyway, it can be used as an opportunity to create the most conducive learning or working environment. So Vestry members should be encouraged to form a 'contract' or 'covenant'; a negotiated agreement which identifies what is expected of each member. "*Covenant agreements allow a group to design its relationship so that it honours the group's interests and embodies the group's values. Covenant agreements specify how a group will work together. They define what each participant can count on from the other*".<sup>7</sup> In other words, agree explicitly how you are going to create the most productive working environment by setting 'ground rules'; these establish a set of behavioural norms for this particular Vestry.

For example, such a list might be formed around the group's expectations of the following areas:



<sup>7</sup> *Practicing Right Relationship* Mary Sellon and Daniel Smith Alban (2005) 96-7



The art of negotiating a contract will involve patient listening and the achieving of consensus, and will take time. This is best done as an introductory exercise apart from the normal business meeting, probably held soon after the AGM of the congregation, and perhaps in the setting of a social evening for members to get to know each other.

However it is all very well *establishing* a set of guidelines in the form of a Vestry Contract, but these need to be *upheld*. It is useful to circulate a copy to each member and to ask very deliberately mid-way through the Vestry term of office “how are we doing in terms of our covenant?” The reflection at the end of the meeting (see below) might also include the question “did we do business in a manner faithful to our contract?”<sup>8</sup>

- **Vestry members need to take time to get to know each other**

This practice - variously termed ‘checking in’, ‘logging in’ or ‘weather reporting’ in the literature - while simple, is remarkably effective in changing the way Vestry members regard each other and interrelate. It consists of beginning each meeting by taking the time to let each person speak briefly of something significant that has happened in her/his life in the period since the last meeting. This might simply be by asking each to speak of a recent cause for joy or sorrow in their life, or else the question might be framed as follows:

*How have I seen, felt, discerned God’s presence in my life since the last meeting?*

Obviously answers need to be limited to a sentence or two so that the process doesn’t take up the entire meeting time, but even a short process is worth doing; experience has shown that Vestries that know each other at a deeper level work more effectively together.

Similarly at the end of a meeting, members can ‘check out’ by going around the group twice, keeping the answers to a sentence or two:

*Where have we seen God’s presence in this meeting?*

*Where have we blocked God’s spirit in this meeting?*

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<sup>8</sup> For further reading about the forming of contracts, see “Forming and living the relationship” in *Practicing Right Relationship: Skills for Deepening Purpose, Finding Fulfilment and Increasing the Effectiveness in your Congregation* Mary Sellon and Daniel Smith Alban (2005) “Contracting for success” Section 2 (9) *The Trainer’s Toolkit; Bringing Brain-Friendly Learning to Life* Kimberley Hare and Larry Reynolds Crown House Publishing (2004). For a sample Covenant/contract from a congregation in the American Episcopal Church, see Appendix 6

- **Vestry members need to build in time away together**

Many Vestries find it valuable to schedule an 'Away-Day' into their year's calendar of meetings. This may be a Quiet Day when they pray and sit in silence together, or else a 'vision-building day' led by an external facilitator when they reflect upon the direction of the congregation and their role in guiding that, or else a time when they share food and news together as a community – or a mixture of all three. In some areas of the diocese, the exigencies of geography make it difficult to go away to a retreat centre or convent, and so a neighbouring church hall of a different denomination is used, affording the benefits of being 'off-site' for the day without unnecessary travelling. In Appendix 7 we offer the programme used by one Vestry for a recent vision-building day.

- **Vestry members need to see that their investment of time and energy makes a difference**

There is nothing more dispiriting than belonging to a committee where the agenda never changes from meeting to meeting because decisions are not taken nor actions planned; the same goes for Vestries! The Chair needs to ensure that agreement is reached on the course of action to be taken in relation to each item on the agenda, and not move on until that has been agreed, preferably with the Minute-taker noting in the right-hand margin the initials of the person/s who will action that item and the time by which it requires to be done. Naming those who will action the various tasks helpfully raises the level of corporate responsibility and individual accountability. If there is a major issue that requires more thought than is possible at the meeting in which it is first raised, then a methodology and a timescale for further consideration need to be clearly stated so that things do not drift. Vestry Minutes and the subsequent agenda should be circulated well in advance of the upcoming meeting.

- **Congregations need leaders who are visibly committed.**

Vestry members must actively give of their time, talent and treasure if they expect members of the congregation to do so as well. This includes:

- participating regularly in worship, as well as in educational and other types of programmes
  - pledging financial support to the congregation
  - offering talents to support the congregation's ministry
  - being active disciples in daily life and work
  - being mindful of the sacrificial giving of time and talents of *other* volunteers in the congregation and finding ways to affirm, appreciate and applaud these
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*Resistance to framing the work of a board as worship tends to come from the conviction that 'there is a place for everything and everything should be in its place'.  
Worship belongs to Sunday and sanctuary; Bible study belong to house-groups; prayer belongs to worship.  
But an inspirational moment in a meeting does wonders in loosening the strings of resistance!  
And those inspirational moments will come once worshipful work is attempted.  
Let the only rule be "meetings are worship". All else will flow to and from that fountain.  
Then we can drink from its fullness. Olsen (1995), 26*



### **Vestry business as worshipful work**

One of the ways in which Vestries can become more 'vibrant' is by making their work more worshipful. The second half of the session should be spent examining some of the ways in which this can happen, with contributions from the group about their experience of using any of these, or their anxieties about so doing.

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Many Vestries meet for prayer or a Eucharist half an hour before the scheduled start time of the meeting, but often people find themselves unable to attend this (especially if it is held in the early evening) and so turn up purely for 'the business part'. Here we suggest ways of integrating prayer or Bible Study into the agenda of the meeting itself so that the two 'parts' are seen as a seamless whole and the meeting does indeed become 'worshipful work'.

**Bible study:** Some Vestry meetings have traditionally started with a short reading from scripture – why not enlarge this to engage in some form of corporate reflection upon the chosen passage (next Sunday's Gospel; one of the set lections for the day) and its implications for the agenda ahead? Two methods that might be used for this are offered in Appendices 8 and 9, namely Mutual Invitation Bible Study and Contextual Bible Study

**Prayer:** Charles Olsen writes as follows; *Members of a church council used the term 'bookend prayers' to refer to the perfunctory way in which prayer can be scheduled and offered at the beginning and close of the meeting. It traditionally separates out the spiritual aspects of the meeting from the 'business at hand'...If we redefine the activity of the people of God serving on church boards and see it as worshipful work, then prayer can no longer be relegated to a book-end position; it will saturate the agenda and thread its way throughout the meeting. Church boards that are 'doing board differently' are discovering ways to allow prayer to permeate the whole meeting.* Here we have adapted some of Olsen's suggestions for 'permeating' Vestry meetings with prayer. Some may seem whacky to you; remember this is not a prescriptive list but rather a basket of suggestions to catalyze your own practice. Borrow and adapt at will!

- **Create an atmosphere of worshipful work**

Place a symbol of the life of your congregation in the centre of the table/room and light a candle at the start of the meeting. Blow it out at the close. The meeting is thus viewed as 'holy ground'.

- **Frame prayers to the agenda**

Frame traditional opening and closing prayers in relation to the agenda of the meeting. The invocation might focus on an image of God and create an openness to/awareness of the Spirit's presence and leading. The closing prayer might be a thankful offering for the work of the meeting lifted to God.

- **Intersperse prayers of thanksgiving**

Follow each committee report or grouping of business with prayers of thanksgiving. Imagine that the 'stuff' of the meeting is piled on the table in front of you. Sort through the stuff at intervals and identify occasions for thanksgiving. Ask a designated member to voice a prayer. Or the whole group could participate in naming each blessing and respond in unison ('We give you thanks, O Lord') or by singing a responsive line from a familiar hymn with a thanksgiving theme, such as 'Now thank we all our God', or a Taizé chant.

- **Offer prayers of confession**

Confession covers not only errors and sins but also weariness, frustration, confusion, boredom and so on. Naming 'how things really are' and 'what is left undone' are healthy processes, but by themselves they can paralyse a Vestry; so why not take time to offer these to God?

- **Take 'time-out' for prayer**

After twenty minutes of debate and discussion over an issue on which people seem divided, the egos take over. Some groups have found it helpful to take three to five minutes of silent 'time out' for personal refocusing and prayer. Let each silently consider these questions:

- *Am I closing myself off from information that we need to make this decision?*
- *Whom do I need to forgive to be more fully present here?*
- *What is an image of God than needs to come to bear on this setting?*
- *How does the scripture that we read shed light on this issue?*
- *Am I operating in a need-to-win or need-to-save face mode?*
- *How would servant leaders make this decision?*

Time-out periods could be called by a strict clock setting, or by the meeting chair, or by any member who requests it at any time for any reason.

- **Rotate prayer**

At the beginning of the meeting, assign each person to a certain fifteen minute segment of the meeting; during that assigned time, the member should pray silently for each person in the group and for the process in which the Vestry is engaged.

- **Sing prayers**

Send each Vestry member home with a hymn book and the assignment to select one verse of any hymn that best captures the mood of the congregation at the present time. Sing one or two of these through at the meeting. Some

Music heals the soul and the community. We cannot sing together if each person is striving to sing more loudly, competing for the spotlight. In a similar way, I am sure that singing together in harmony, learning to sing one's own note, to find one's place in the melody, forms us as brethren, and shows to other people what it is like to live together without competition and rivalry. You can see how a community lives together when you hear it sing.

Timothy Radcliffe OP *I Call You Friends*

Lord, it is night.  
The night is for stillness.  
Let us be still in the presence of God.

It is night after a long day.  
What has been done has been done;  
what has not been done has not been done;  
let it be.

The night is dark.  
Let our fears of the darkness of the world  
and of our own lives rest in you.

The night is quiet.  
Let the quietness of your peace enfold us,  
all dear to us,  
and all who have no peace.

The night heralds the dawn.  
Let us look expectantly to a new day,  
new joys,  
new possibilities.  
In your name we pray.  
Amen

Vestries have never sung together and discover unusual talent! The blend of many voices also moves the Vestry along the path of corporate spirituality. Often discussion and discourse are anything but harmonious. Singing together models the harmony to which they aspire.

The presence of wonder and mystery in music also helps break up the rational framework of most meetings by adding some 'grace notes'

### Preparing for the next session

**Think about the last time there was a vacancy in your charge. Recall what you as a vestry member did and what your responsibilities felt like during that time.**

To close the session, the facilitator might invite the group to listen to someone reading the Ephesians 4 passage on page 18 and then spend five minutes in silence reflecting upon it, followed by a time of open prayer and/or use of the prayer above from the New Zealand Prayer Book.



## Session 4 Vestries in a Vacancy

*Aim: to examine the various tasks that the Vestry needs to tackle together during a vacancy and to offer some tools for so doing.*

The procedures to be followed when a vacancy arises are detailed in the "Vacancy Procedures for Vestries" booklet, copies of which are obtainable from the Diocesan Office. These procedures have been drafted by ecclesiastical and legal advisers, and it is important that they are followed.. It is stressed that Charges envisaging or approaching a vacancy **must obtain the booklet on the subject.**



Think back to the last time your charge was in a 'time of transition'/vacancy. Share with members, preferably from another Vestry if you are doing this in regional groupings,

- ***how the process of writing a profile was handled; by whom and over what timescale.***
- ***how the process of discernment was handled; by whom and over what timescale.***
- ***the kind of preparation you engaged in for the task of interviewing candidates***



Facilitator invites feedback, charting up examples of good and bad practice 5  
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### Holding the fort 15

One of the occasions when a Vestry needs to be at its most vital and versatile is during the period when there is no cleric in post, that time that is called either 'an interregnum' or 'a vacancy' – or preferably 'a time of transition', since the ministry of the congregation continues and is certainly not suspended. The transition time is a time for a congregation to examine who it is, to look at where its mission and ministry is going next and who it needs to help lead that. 'Transition' carries the connotation of moving from one place to the next and is an appropriate word as this can indeed be a dynamic time in the life of the congregation in which it discovers opportunities for growth and renewal.

A healthy transition and effective ongoing ministry during the transition time are goals that the Vestry should actively pursue. Researchers who have studied the time when a congregation is between priests have identified five developmental tasks as essential if the congregation is to emerge from the interim period ready to support the new Rector with renewed enthusiasm and fresh hope:

- |  |                                    |
|--|------------------------------------|
| reviewing history                      | dealing with grief, loss and anger |
| evaluating and planning for the future | developing leadership              |
| encouraging lay ministry               |                                    |

### Some transition activities

- Coming to terms with history: acting on the realisation that the former rector has departed, and that the congregation will be different now; seeing the past as the prelude to a new future
- Establishing a new identity: claiming a new awareness of itself as a congregation independent of the past rector; redefining who it is now as a family of God.
- Adjusting to new patterns of leadership that naturally evolve when a key individual leaves the organization; allowing new leadership to come to the fore constructively.

During this time, Vestry members should

- **model engagement in congregational life** with their time, talent, and treasure: people sometimes retreat during transition times because they feel uncertain about the future. Uncertainty is natural, but your congregation needs you!. Costs can rise during an interim time and cutting a pledge can cause real harm to the success of the search. (Some charges find that giving drops during this time because of people's uncertainty about the future.)
- **ensure good communication.** A Vestry must ensure that the Congregation is given information on how ordinary pastoral care is to be carried out, on how emergencies are to be notified to the Interim Priest and about progress in relation to a new appointment.. The presence of a non-stipendiary cleric will be invaluable during this period, but it must not be assumed that s/he can undertake all the work done in the past by a stipendiary colleague. The Interim Priest should be invited to attend Vestry meetings occasionally. Where a Charge has NSM clergy, it is advisable that they be included in the process of appointing a new priest. It is suggested that they are co-opted on to Vestries as non-voting members for any discussions about the vacancy and future incumbent.
- **maintain appropriate boundaries with the previous Rector.** Parishioners may be tempted to ask the previous Rector to officiate at occasional offices after they have left. In order for the charge to move on, they have to embrace the ministry of the Interim and later the next Rector. It helps everyone if these boundaries are honoured. There may be special circumstances that lead the Interim priest to ask the previous rector to co-officiate at an event, but that is always at his/her purview.
- **re/connect with the diocese:** often during a vacancy a congregation will be more open to working with diocesan representatives and receiving their support. In places where there has been conflict between Diocese and charge, the transitional period will provide a unique opportunity for relationship rebuilding. The Diocese has skills and resources at its disposal that can be of use to a charge during a time of transition.

But vacancies are times of uncertainty and thus anxiety, and congregations often approach them with trepidation. People may be feeling ‘betrayed’ by the Rector’s leaving, fearful that beloved traditions might vanish or anxious that they won’t like the new leadership. The experience of transition between clergy raises the anxiety level of the parish because the congregation is thrown into disequilibrium. As anxiety rises, behaviour emerges from the lower part of the brain and thus becomes more instinctual. Emotional reactions override thoughtful responses. Those who are most vulnerable because they are least able to regulate their emotional reactions act out this anxiety by provoking conflict, misperception, rumours, and division. Others seek quick fixes to relieve their discomfort. Under the stress of anxiety, it is not unusual for a charge to regress to familiar and less mature patterns of behavior which can include blaming, triangling<sup>9</sup>, secrecy, sabotage, attacks, and a herd mentality in which negative emotions can spread quickly from one person to another. Old troublemakers who might have been under control during the last incumbency may step out of the shadows during a period of anxious regression.

Usually such experiences are short-lived. If the congregation has normally operated with a low level of anxiety, it will readjust under the steady and non-anxious resilience of a skilled Interim priest and a mature Vestry. But if the congregation has been subject to chronic anxiety, usually due to earlier unresolved trauma (sometimes generations ago), the anxiety of the transition can tip the scale, quickly ratcheting up emotional reactions. When this happens, a seemingly innocuous issue such as a small change in worship, a sermon, or a staff change can cause such reactions to spiral out of proportion resulting in a polarized congregation and an intolerance towards well-differentiated, mature leadership. If interventions are not made early, the resulting conflict can shut down the process of honest self-reflection and effective discernment. Moreover, good candidates always “get wind” of such situations and many withdraw from consideration.

If a parish has a history of chronic anxiety, the Vestry is wise to call upon a consultant early in the tenure of the Interim priest; approach the Mission Core Group for such a person. If significant conflict should arise, it is best to take time to address this rather than move too quickly into the discernment process. An acutely anxious parish in which there is conflict or an inability to contain troublemakers may need to plan for a longer interim period than normal. This will almost always go against the wishes of parishioners who may pressure the Vestry to move quickly to call a new priest. In such circumstances, the pressure to bring things “back to normal” is intense. To succumb to this pressure is to ensure the continuation of the chronic anxiety and in all probability a problematic new incumbency.




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**Invite any comments on the foregoing**

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<sup>9</sup> When x and y are having a problem and x, rather than address the problem with y directly, gets z involved.





**Procedure:** normally no major action will be taken to fill a vacancy until the existing incumbent has left. At the start of the vacancy, the Bishop (or Dean) will meet with the Vestry to discuss plans for the future, and outline the procedure to be followed to find a new Rector. S/he will outline the procedure to be followed to find a suitable person, and will probably wish to be involved at all stages in the process. Nothing should be done by the Vestry or by individuals to seek a new Rector until that meeting has taken place.

For the period of the vacancy, the care of the vacant charge both in the provision of services and the pastoral care of the congregation shall be the responsibility of the Bishop, who may appoint a priest to act as Interim priest or place the charge in the care of a Diocesan Chaplain or invite some other cleric to take services and attend to other pastoral duties. The emoluments and expenses during a vacancy shall be provided by the Vestry. The Communicants and other Rolls and Registers of Baptisms, Confirmations, Marriages, Funerals and Burials shall be held by such person and in such manner as the Bishop may direct.

**Property:** before the existing Rector departs, the Property Convener should visit the Rectory to find out which fittings and fixtures belong to the Rector, and which to the Rectory. Once the Rectory is vacant, insurance cover may be restricted, and certain special precautions may be required. Advice should be sought from the insurance company.

When the Rectory is vacant is a good time to consider carrying out improvements which may be required. There may also be spare finance at this time. The work to be done should follow a full inspection by a qualified person. If a Quinquennial Review has been undertaken in the past year, this may serve the same purpose. Redecoration should only be undertaken after discussion with the new Rector. Section 2 of chapter 6 in the Vestry Handbook gives recommendations on clergy housing. It is possible to apply for Provincial grants and loans towards the improvements. Details of how to do this may be found in chapter 9 of the Vestry Handbook.

**Profile:** the Vestry will be required to produce a congregational Profile. The purpose of this Profile is to enable a congregation to discover its strengths and weaknesses and to discern the direction of ministry in the future. The Profile may take some time to produce, so it is important that work starts on it as soon as possible. It is often useful to involve other members of the Congregation in this exercise.

Most congregations have a self-image of who they are; the work on the profile, if it is done properly, will reveal whether or not this self-image is accurate. The transition period is an opportunity for the congregation to take a good look at themselves. No person or group can ever hope to accomplish any change unless they have a clear picture of who they are today. So this is a time to look at the congregation's past, present and future, its history, its present needs, its goals. The task at this stage is to respond to two key questions:

*What does this congregation need to learn about itself?*

*What is the best way to learn it? (e.g., surveys, interviews, parish meetings, research and statistics, etc.)*

Consider, too, the strengths and weaknesses of the congregation, its gifts and its needs, and its place in the purposes of God.

*What is the particular mission of this congregation?*

*What is needed to accomplish that mission?*

*What difference would it make to us, to our community, the world, if we no longer existed?*

The results are condensed into a document known as a "parish profile," including the profile of the desired clergyperson, outlining the skills, experience, qualifications and leadership style needed as determined by the study. All charges, but especially those that have experienced significant trauma, conflict, stagnation and/or decline, will find it most productive to take sufficient time to reflect on their history, values, vision for future ministry and the kind of leadership needed.





**Interviewing candidates:** it is likely that several Vestry members will be involved in the selection of the new Incumbent, so we have included some material on the process of interviewing.

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*Almighty God, giver of every good gift:  
Look graciously on your Church,  
and so guide the minds of those who shall call a priest for this charge,  
that we may receive a faithful pastor, who will care for your people and equip us for our ministries;  
through Jesus Christ our Lord. Amen”*

At the heart of the calling process lies discernment: discernment of the gifts in the ministry of a priest who can help your charge fulfil its mission, and discernment of the gifts in the strengths and challenges of your charge that can help fulfil a priest's ministry. Your work on the profile will have identified the gifts God has given your congregation. Now we turn to seeking evidence of the gifts God has given those who are candidates in your process.

Many people have learned interviewing skills in their work, or through voluntary or community service. Such skill backgrounds can be adapted to the specialized process of interviewing clergy in the name of the Church. However there is an added dimension to this particular task; this is about seeking God's will for the congregation and then, of equal importance, for someone whom God is calling to be your leader. Charges, therefore, do not interview priests only in order to “hire” them to fulfil a contract. Neither do priests come “applying” for positions only to suit some personal ambition of their own. Congregational leaders and priests come together with a common faith and a common task - to seek the guidance and will of God for God's people in that particular time and place. It is indeed a time of *inter-viewing*; a time for priest and people to *view* each other searchingly through the eyes of faith, to pray hard for each other, to ask hard questions, and finally to make hard decisions. When the hearts of all concerned are open to God's guidance, then we have grounds for hope that God will bless the call and support the covenant between parish and priest.

An interview is a mutual testing of call: a priest's potential call to a particular charge/cluster and a charge's/cluster's call to a future with a particular priest; each party is preparing to make an important decision about the future. The interview process seeks to predict or anticipate a future relationship largely on the basis of two sets of past experience: of the candidate and of the charge (as reflected through its interviewing representatives). Conclusions for both parties will come about as they discuss their experiences, describe what experience has taught, and consider how the two sets of experiences promise to match or clash.

Interviewing is discovery; each person taking part in the interview, including the priest, should seek to discover for her/himself and for the charge: “Will the relationship wear well, through good times and bad, in the deepest of human experiences?” You may make new discoveries about each other; facts about the priest and about the parish that did not get written down beforehand. Look at the whole ministry of the charge, not only the ministry of the priest. The ministry of the congregation and its members is up for “viewing” as well as that of the priest. The priest and interviewing committee must get to know each other well enough to avoid inadequate impressions or snap decisions. Provide sufficient time and opportunity to be with candidates in a variety of situations.

#### Beforehand

- Become a team: You need to feel like a team to be able to trust each other and be comfortable about disagreeing with one another. Familiarise the interviewing committee with each other and the process, and begin to build relationships. Establish ground rules for healthy discussion, openness, respect and disagreement.
- Spend plenty of time talking about how you will handle interviews and visits. Role-playing can be a useful tool to help the interviewing committee familiarise itself with the art of interviewing as well as to sensitise itself to how it feels to be interviewed. A priest who is not a candidate can be helpful in the role of a candidate.
- Send ahead materials to help prepare the candidate, including a schedule for the time to be spent with you. Include these elements:
  - informal times for candidate (and candidate’s spouse) to meet people individually and in small groups;
  - tour of church facilities and community;
  - opportunities for candidate to meet with staff members, vestry members, etc;
  - formal interview with whole committee;
  - private time and space for candidate and candidate’s spouse;
  - attention to specialized needs of each candidate (e.g., exploring employment opportunities for spouse, visiting schools, etc.).
- Each candidate should know where his/her interview fits into your process. Are you just beginning with a long list of candidates, or is this interview coming close to a final recommendation? Or are you somewhere between those two extremes?

## The Interview

- An interview is a face-to-face exchange to help an individual and a group get to know each other. Try to create an attitude of mutuality between the candidate and those representing the congregation. Be prepared for, and open to, questions which the candidate may ask. These can profitably shape as much as half of the interview. How they go about learning about you helps you understand how they work.
- The best setting and arrangement of the room depends on the personality of the interviewing committee. Some prefer meeting around a table, which is more formal. Others prefer a more casual “lounge setting.” A setting in which a candidate sits before “a panel” should be avoided.
- Some committees work best from a set of “standard questions” and assigned areas of responsibility for answering questions; other work better with a more relaxed conversational style. This should be discussed beforehand and a decision made on the style they wish to use. In either case, attention must be given to structuring the interview:
  - build good rapport at the beginning before getting down to business
  - keep moving so you don't get bogged down in one subject, however interesting
  - bring the interview to a definite end on time
  - since it is distracting to have everyone writing during the interview, someone should be appointed for each interview to take notes and write a summary. Everyone should understand how the record is being kept.
- An interview is not a grilling or a confrontation. Nor is it an occasion for finding out facts which should be a matter of record, on paper, for both congregation and clergy. Interviewing should shed light and interpretation on recorded information, particularly where terms and concepts may mean different things to different people.
- Vestries should remember that they are acting not only in their own name but in trust for the people of God in this congregation. Be clear about the level of confidentiality required.

Framing questions: every question you ask can be evaluated three ways:

- *What does it have to do with the position?*
- *Why do we need to know?*
- *Would I be willing to answer the same question about myself?*

You should agree in advance as to what questions must be included in every interview, and write them down ahead of time. These are the “core” questions for your search process. They should be based on the parish profile and job criteria and should be the same for all interviews. Trick questions have no place in clergy interviews.

You may also want to ask specific questions based on information already on hand about the person to be interviewed. Information about the parish and about a priest should be studied together by the committee in preparing specific questions for each candidate. This sets up opportunities for mutual exchange based on what records show about expectations for the parish and for the priest.

It is generally more helpful to focus on how the priest functions rather than how s/he expresses concepts. Try to elicit stories of actual experiences rather than recitals of theory or listings of credentials. Ask questions which will lead the candidate to describe specific achievements or accomplishments. Achievements point to skills, abilities and effectiveness, and may be more useful measures than mere length of experience. A rule of thumb is: the way a person describes handling a situation in the past indicates how he/she might act in the future. Avoid “Yes/No” or other short answers. You will be watching to see whether the priest draws naturally, attractively and with confidence on the resources of education, experience and faith. Sample questions are offered in Appendix 11.

**Some examples of good practice:**

*What comments or questions do you have regarding our parish Profile?*

*Tell us about a time when . . .*

*What do you want us to know about . . . ?*

*Give us an example of . . .*

*You say . . . about yourself. How has that been demonstrated?*

*Describe an experience where . . .*

*How do you . . . ?*

*What is your experience with . . . ?*

- For each category of questions, your objective is to discover what may happen in the life of your charge and its members if this priest is called.
- Answers may be less important than the feeling or attitude behind them - energy, conviction, enthusiasm, sensitivity, respect for acceptable differences and contagious personal faith.
- It is important to know not only about the priest's prayer life and spiritual journey but how s/he would guide and accompany other people.

Listen attentively	honour the ideas and concerns of others by listening with care
Practice courtesy	observe relaxed courtesy
Speak for self only	listen and speak from an "I" position
Model transparency	act with honesty, openness, directness.
Honour confidentiality	respect private or personal confidences when appropriate
Refrain from judging	resist speculation or censure about the motives or spiritual maturity of others.
Communicate consistently	make careful, consistent communication a priority.
Be open to the new	be receptive to exploring new ideas and possibilities

#### Afterwards

- Once the formal interview is concluded, there must be a time for reflection and prayer. It is suggested that the Vestry does not make a decision until 24 hours after the interview.
- No matter how the interview goes, the candidate should leave the interview feeling good about him/herself. This is the responsibility of the interviewing committee.
- Feedback for each candidate may help her/his personal growth even if your charge is not a good "fit." Don't keep the candidates waiting after your decision.
- Everything of a personal nature revealed by the candidate is privileged information and should never be disclosed. All records should be destroyed after the call is extended and accepted.
- Once a priest has been eliminated from your consideration, s/he should be notified promptly, with an expression of gratitude for the time and attention given.

- Vestries should promptly pay all travel and accommodation expenses to the candidate(s)
- If the new Rector has been appointed from outwith Scotland, the General Synod Office will provide a "Welcome Pack". The Vestry should ensure that this has been received by the new Rector.
- A date for removal should be agreed. Guidance about financial assistance for removal costs may be found in chapter 9 of the Vestry Handbook
- It is the responsibility of the Vestry to ensure that the Rectory is clean and ready for occupation, with all services connected and in working order.



### Invite any comments on the foregoing

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The facilitator should round off the series of sessions with appropriate thanks where due. The group may wish to conclude this final second session with a time of open prayer giving God thanks for all that has been shared, discussed and learned.

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# APPENDICES

## APPENDIX 1 Model Constitution (extracts)

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**Vestry.** The temporal affairs and the general management and control of the Charge shall be under the management of a Vestry consisting of the Rector *ex-officio*, the Lay Representative *ex officio*, and<sup>10</sup> not more than eight nor fewer than three constituent members, three to be a quorum. The members of the Vestry from time to time shall be considered "Charity Trustees" of the Charge and have the consequent duties and responsibilities arising from that position. Any person disqualified from acting as a Charity Trustee for the purposes of the 2005 Act as amended or superseded from time to time shall be disqualified from being a Vestry member. The Vestry shall meet at least twice a year, and the Chair, who shall have a casting as well as a deliberative vote, shall be the Rector, or in the case of his/her absence, a member elected by the Vestry. Special meetings of the Vestry may be called at any time at the request of three members by notice in writing addressed to the Secretary of the Vestry or at the request of the Rector. Of the elected members at least one shall retire annually, and shall not be eligible for re-election that year<sup>11</sup>. The elected member(s) to retire shall be those who are the longest serving and, in the event of there being more than one member in such category, the identity of the member to retire shall be determined by lot. Casual vacancies in Vestry membership (or in the office of People's Warden) occurring between Annual Meetings of the Congregation may be filled by the Vestry until the next Annual Meeting of the Congregation. A casual vacancy in the office of Rector's Warden shall be filled on the nomination of the Rector. All members of the Vestry shall be selected from the constituent members of the Congregation. [The Secretary and Treasurer appointed by the Vestry, if constituent members of the Congregation, [and the Rector's Warden and the People's Warden] shall be members of the Vestry, *ex-officio* and shall be entitled to vote OR The Secretary and Treasurer appointed by the Vestry shall not be members of the Vestry and accordingly shall not be entitled to vote]<sup>12</sup>. Any Vestry member who in the reasonable opinion of the Vestry becomes incapable of adequately discharging their functions by reason of ill health or otherwise conducts themselves inappropriately may be removed from

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<sup>10</sup> *In the case of congregations where it is desired to have churchwardens the following clause should be substituted for the remainder of the sentence "one churchwarden to be appointed annually by the Rector or Priest-in-Charge (to be known as the Rector's or Priest's Warden), one churchwarden to be elected by the congregation at the Annual Meeting above referred to (to be known as the People's Warden), and not more than six nor fewer than three constituent voting members, three to be a quorum.*

<sup>11</sup> *If there is significant difficulty in recruiting vestry members, it may be desired to omit the provision forbidding re-election in the year of retirement.*

<sup>12</sup> *Whether the Secretary and Treasurer should be members of the Vestry needs to be carefully considered and the position may vary from congregation to congregation. If such individuals play an actual role in the decision making of the Vestry or are involved in the general control and management of the of the administration of the congregation's affairs, they will be regarded as "charity trustees" and it would be appropriate for them to be accorded power to vote. Where such individuals are remunerated the provisions regarding trustee remuneration in the 2005 Act will need to be carefully adhered to. In circumstances where such individuals do not play such a role of general control and management (which may for example be the case where external professionals are employed in such offices, it would be more appropriate for them not to be charity trustees and accordingly not have a vote. In considering these issues, it may be that differing conclusions are arrived at in relation to each respective role.*

Vestry membership upon the unanimous vote of the other Vestry members at a meeting of the Vestry after they shall have heard the Vestry member concerned unless he or she has declined to be heard or is prevented from doing so by disability, illness or long term absence from attending and the reasons for such removal shall be recorded in the minutes of any such meeting and any such removal shall be subject to the written authority, which authority can be withheld, of the Bishop within 28 days of the Vestry's vote on that matter and the Vestry member concerned shall be entitled to make written representations to the Bishop before the Bishop provides any written authority on this matter.

**Duties of Vestry (and Churchwardens).** The Vestry shall ensure that the needs of the whole Church in regard to mission work at home and overseas and the other objects of the General Synod may receive the interest and support of the Congregation. The Vestry shall generally assist the Rector (subject always to his/her canonical rights and duties) in every way in their power in all matters affecting the spiritual welfare of the congregation.<sup>13</sup>

The Vestry shall have charge of the fabric and property of the Church, and of any Rectory (or Parsonage), Schools, Halls or other property which may be acquired in connection with the Charge, as well as all gifts and bequests for endowment, charity or other purposes which may accrue to the Church from time to time. They shall be bound to keep the buildings and properties in repair and insured against fire and other risks including public liability, and to discharge all property burdens and responsibilities, and to assist the Rector or Priest-in-Charge in the safe custody of the Church plate, registers and other documents. The Vestry shall be responsible for keeping the Rectory (or Parsonage) wind and water tight, and in proper sanitary condition, the Rector being responsible to the Vestry for ordinary internal repairs - unless otherwise arranged between the Rector and the Vestry. (*The matter of internal repairs may be made the subject of a special arrangement between the Rector and the Vestry.*) The funds of the Charge so far as not used for the acquisition of property to be used as a Rectory or Parsonage or otherwise in connection with the Charge may be invested in any kind of investment

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<sup>13</sup> Where Churchwardens are appointed, their duties should be set out in the constitution. In circumstances where the Churchwardens' duties are intended to reflect the provisions contained in Resolution 1 under Canon 35 and under Canon 60.2, it may be appropriate to include a provision as follows:

*"The Churchwardens shall be responsible for seeing that a detailed inventory of all such goods and ornaments, registers and other property belonging to the charge in accordance with the print in use with the authority of the Bishops subject to any adjustments thereto which may be approved by the Standing Committee of the General Synod shall be prepared and kept up to date and shall send a copy of such inventory, amended from time to time as necessary, to the Registrar of the Diocese. With the Rector, the Churchwardens shall have care of the property and fabric of the Church building including the parsonage house or houses, halls offices and any other properties acquired in connection with the Church, unless otherwise directed, and shall see to the safe custody, maintenance, insurance, use and administration of the same. The Churchwardens shall report to the Vestry on the above matters. (In the event of such a clause being included, the earlier provisions of Clause 13 would need to be amended to reflect the fact that certain duties fall on the Churchwardens rather than the Vestry.)"*

(including an investment in heritable property) but such investment may only be made after the Vestry have had regard to the suitability of the proposed investment for the Charge and the need for diversification in so far as appropriate for the Charge and before exercising any power of investment and when reviewing the Charge's investments, the Vestry shall comply with the provisions of the 2005 Act, including consideration of whether proper advice requires to be obtained. The Vestry shall have the power to delegate its investment management function in accordance with the provisions of the 2005 Act.

The Vestry should take cognisance of good practice guidance that may be issued by the Office of the Scottish Charity Regulator ("OSCR ") or by the Church from time to time in relation to issues of practice or procedure affecting the Vestry's activities and responsibilities. The Vestry may only apply the property and funds of the Charge in furtherance of the Charge's charitable purposes.

**Office-Bearers to be appointed by the Vestry.** The Vestry shall appoint a Secretary and a Treasurer who need not be members of the Vestry. The offices of Secretary and Treasurer may be combined. It shall be the duty of the Secretary (a) to ensure the keeping of minutes of the proceedings of the Vestry and of the meetings of the constituent members of the Congregation; (b) to exhibit same when called upon to any member of the Vestry; (c) to issue notices of meetings; (d) to conduct necessary correspondence, and generally (e) to conform to instructions received from the Vestry. It shall be the duty of the Treasurer (a) to prepare and keep the accounting records of the Charge; (b) to prepare annual accounts, and submit them to the independent examiner/auditor appointed in terms of Article 8 hereof; (c) to ensure lodgement in a bank or building society, in an account opened in name of the Charge for that purpose, all monies received by him/her on behalf of the Congregation; (d) to exhibit when called upon his/her accounting records to any member of Vestry, and generally (e) to conform to instruction received from the Vestry. The bank or building society account shall be operated in such manner as the Vestry may direct.

**Annual Report of the Vestry.** The Vestry shall, at the Annual Meeting of the Congregation, present a (written) report upon their transactions during the preceding year, including the congregational accounts under their charge, with the independent examiner's/auditor's report thereon. The report and accounts shall be made available to the Congregation before, at or after the Annual Meeting and a copy shall be provided to any member of the Congregation upon request to the Treasurer. A copy of the accounts and of any other written reports submitted to the Annual Meeting shall be appended to the minutes of the Annual Meeting.

**(a) Appointment of Rector.**-The appointment of the Rector shall rest with ;<sup>14</sup> and the Patron (or Patrons) shall, immediately on a vacancy occurring, communicate with the Bishop, and thereafter act in consultation with him/her in the filling up of the appointment. Upon presentation to the Bishop of a duly qualified person, and the Bishop's acceptance of the same, he/she shall be instituted as soon as possible. The person appointed shall enjoy as Rector all rights secured to him/her by the Canons or this Constitution as from the date of his/her institution (or collation).

Or, alternatively, where the Bishop is Patron:-

**(b) Appointment of Rector.** The appointment of the Rector shall rest with the Bishop (in consultation, where required, with the Vestry or representatives nominated by the Congregation for the purpose), and upon his/her choice of a duly qualified person the institution or licensing shall follow as soon as possible. The person appointed shall enjoy as Rector all rights secured to him/her by the Canons or this Constitution as from the date of his/her institution, collation, or licensing.

#### **Remuneration for Services - Vestry Members**

Vestry members may be remunerated for services provided to the Charge but only if any such remuneration for services satisfies the provisions of the 2005 Act as amended or superseded from time to time and any such remuneration shall be decided in accordance with the provisions of Clause 22.

**Remuneration for Services - Stipend of Rector**<sup>15</sup>. In the event of the Rector being appointed on a stipendiary basis, the stipend of the Rector shall be decided in accordance with the provisions of Clause 22 and be of such amount, and be provided in such manner, as may be agreed between him/her and the Vestry to the satisfaction of the Bishop, at not less than the rate of the sum approved by the General Synod as the Standard Stipend for the time being (or an appropriately reduced sum as agreed between the Vestry and Rector and approved by the Bishop in the event of the appointment being part-time). The Stipend shall be payable by equal monthly instalments not later than the last Thursday of each month less income tax and national insurance contributions and, unless otherwise agreed by the Bishop, after deduction of any sums received by the Rector by virtue of employment or other ecclesiastical or secular work. Where the Rector is a member of the Scottish Episcopal Church Pension Fund pension contributions shall be made to the fund at the rate established by the General Synod from time to time. No person shall, by reason only of his/her being a member of the Vestry, be deemed responsible personally for payment of stipend or pension contributions.

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<sup>14</sup> Before the adoption of this Constitution, it must be settled in a conference between the Bishop and representatives of the Communicants of the Congregation who the Patron or Patrons shall be.

<sup>15</sup> The provisions regarding payment of stipend may require alteration where responsibility for payment is shared between more than one charge.

**Appointment to other Offices.** The Vestry may, with the concurrence of the Rector, appoint suitable persons as Organist, Choirmaster, Verger, etc. In the case of such officials, the Rector or Priest-in-Charge shall have the right to require their dismissal, subject to an appeal to the Bishop by the Vestry should the latter disapprove.

**Conflict of interest.** (i) Any decision by the Vestry as to stipend, remuneration, contract, arrangement or other personal benefit received by a Vestry member and any discussion on such items shall take place in the absence of the Vestry members concerned and shall be made in accordance with the provisions relating to remuneration in the 2005 Act as amended or superseded from time to time; and (ii) Vestry members shall declare any conflict of interest and the Secretary, or other Vestry member, shall keep a record of conflicts of interest and any Vestry member with a conflict of interest shall refrain from participating in any deliberation or decision of the Vestry with respect to the matter in question. Where there is any doubt as to whether a conflict has arisen or may arise, appropriate professional advice should be sought.

**Alterations in Constitution.** No alteration shall be made in this Constitution as regards Article 3 hereof, which is fundamental. As regards the other Articles hereof, alterations may be made by a Resolution passed at a special meeting of the constituent members of the Congregation by a majority of two-thirds of those present and voting, confirmed at a special meeting held not sooner than one nor later than three calendar months thereafter by a simple majority of those present and voting, and afterwards assented to in writing by the Bishop. The notice calling such meetings shall specify their purpose and shall state where a copy of the suggested alterations may be inspected. Any such alteration must be notified or consented to by OSCR in accordance with the 2005 Act as amended or superseded from time to time.

**Possible Suspension of this Constitution.** If at any time (whether during a vacancy in the incumbency or not) it shall happen that the Charge shall become so reduced in numbers or in financial resources that the Constitution of the Church can no longer be kept in operation nor provision made for the maintenance of a Rector, this Constitution may be suspended, in accordance with the provision laid down for such an eventuality in the Code of Canons (Canon 36) or similar canonical provision.

**Possible extinction of Charge.** If it shall be decided by the Bishop in Synod, with the concurrence of the Diocesan Synod, that it is impracticable to maintain the services of the Charge, all the rights and duties of the Vestry as guardians of the property and funds shall devolve upon the Property Trustees as previously appointed in Article 4 hereof, a majority of whom - subject always to the veto of the Bishop -

shall form a quorum for transacting any necessary business, and all such properties and funds as may be disposable shall be disposed of or utilised as the Bishop in Synod, with the concurrence of the Diocesan Synod, may from time to time determine. In the event of an emergency, pending the summoning of the Diocesan Synod, the Bishop in consultation with the Property Trustees will take such steps as may seem to him to be necessary and right. The Bishop or Property Trustees shall ensure that appropriate consents are obtained from OSCR in relation to any amalgamation, winding up or dissolution of the Charge.

**Reference.** In the event of any difference arising among the Rector, Assistant Clergy, Vestry or constituent members of the Congregation or any of them with regard to the interpretation of this Constitution or the rights or obligations of parties hereunder or otherwise relating hereto, the same shall be referred to the Bishop of the Diocese for his/her decision, whose award or awards, interim or final, shall, subject to a right of appeal to the Episcopal Synod, be final and binding.

## **APPENDIX 2 Food Safety**

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The need for high standards of food safety has been highlighted in recent years in a number of well-publicised incidents of food poisoning. The fact that the most notable of these arose from lunches served in a church emphasises the need for Vestries to adopt a responsible attitude toward food safety. There are three main areas that should be considered:

### **Training**

It is a legal requirement that those involved in preparing or handling food which is supplied to others are trained in food hygiene to a level appropriate for their job. For example, there could be one person in each congregation, trained to at least intermediate level, in overall charge of co-ordinating catering. The nature of the training required will depend on the nature of the catering undertaken. Food hygiene courses at different levels have been designed by The Royal Environmental Health Institute of Scotland (REHIS). Such certificated training may be delivered by further and higher education establishments, private trainers, or the local authority. Alternatively, non-certificated training may also be delivered. Usually the trainers who provide REHIS training will also offer short, uncertificated training which can be tailored to the needs of individual organisations. (If non-certificated training is undertaken, a note of the content of the training programme, the date and the people trained, should be recorded and made available to Environmental Health officers on inspection visits).

### **Registration of Premises**

Registration of premises used for food business is required by law. Generally speaking, if you are only supplying tea, coffee, biscuits, cans of juice and potato crisps, you will not need to register. If the church premises are used for more extensive catering, then consideration should be given to the registration of the premises. You should consult with your local council Department of Environmental Health regarding the nature and use of your premises and agree with them if registration is appropriate. If other groups use the church premises for catering purposes, the Vestry is responsible for ensuring that the premises supplied are appropriate and registered if required.

### **Use of Home Caterers**

The Vestry is responsible for all food served by the church – this includes food prepared by church members at home and brought to the church. Given that it is much more difficult to control the environment within which such food is prepared, consideration should be given to limiting the use of such home caterers to low risk foods such as cakes and biscuits. Your local council Department of Environmental Health should be able to provide you with further information on training providers and the registration process.



### APPENDIX 3 Appreciative Inquiry

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*“By human nature, it is common for us all to look at our lives, our work, or the organizations we belong to, and to see the problems and limitations rather than the strengths and blessings. Without an intentional choice, we will default to a problem orientation and look only at what is wrong with our situation. In times of great change and challenge, it seems easier for congregational leaders to recite the congregation’s problems, and to note what is missing, rather than to see the gifts of the congregation.” Gil Rendle and Alice Mann *Holy Conversations; Strategic Planning as a Spiritual Practice for Congregations*.(2003, 17)*

Here we offer a resource that Vestries may choose to use with congregations looking at the **positives** rather than on the identification of problems (as often happens in a SWOT exercise; see Appendix 4). The Appreciative Inquiry technique helps a Vestry determine new directions for mission by unearthing the strengths of the past and releasing dreams for the future.

AI is a process *“that uses collaborative inquiry and strategic visioning to unleash the positive energy within the Church to enable Christ’s work to be done in the world”*. It is based on the idea of discovering what works and gives life to an organisation, and then building the organisation on these life-giving properties. In summary it is an approach to development that discovers the best of ‘what already is’ in order to imagine ‘what can be’ and then design ‘what will be’. It was developed by David Cooperrider and his associates in the graduate school of management at Case Western Reserve University (which prepares consultants for corporate America) in the mid 1980’s, growing out of research into discovering what gives life to an organisation rather than looking at the problems an organisation may have. It is used as a major tool in organizational development by businesses across the world (e.g. PepsiCo, British Airways, USAID, US Navy, McDonalds) and also by aid agencies and other humanitarian NGOs; for instance Kofi Annan employed it when convening the 2004 Global Compact Leaders’ Summit at UN Headquarters.)

As a philosophy it is consistent with affirmations of scripture: Hebrews 10, 24 *‘And let us consider how we may spur one another on towards love and good deeds’*; Philippians 4, 8. *‘And now, my friends, all that is true, all that is noble, all that is just and pure, all that is loveable and attractive, whatever is excellent and admirable – fill your thoughts with these things.’* In its participative methods, it is also consistent with *‘taking the least of these my children’* seriously, and with the biblical principles of co-working and mutual encouragement . It is based on the following premises: that

(i) “organisations are already full of great practices”. In other words, within all individuals, teams and organisations there already exist excellent experiences, practices and perspectives on which to build. All individuals and organizations are opportunities to be explored rather than problems to be solved.

(ii) “we get more of what we attend to”. Our perception of reality is a social construction; that which we focus on becomes our reality. We create more of what we spend our time thinking and talking about. If we pay attention to what works, we will get more of what works. If we pay attention to problems, we simply underline and reinforce their existence. (Pygmalion phenomenon: a group of equally talented children is divided and given to two equally talented teachers. The teachers are told that one group is ‘bright’ and the other ‘slow’. By the year’s end the supposed intelligent group will outperform the supposedly ‘slow’ class in measures of academic achievement.) Likewise if we view congregations as dysfunctional, co-dependent and troubled, and seek to intervene in their life from that perspective, we will only confirm our negative perceptions and further add to their problems. Positive results emerge when we approach congregations rather as places where God is at work.

(iii) organisations are ‘heliotropic’; they exhibit a largely automatic tendency to evolve in the direction of positive images of the future.

How is AI different?

- based on a positive approach, building on people’s strengths rather than problem identification. Uses the positive potential of human relationships to encourage and ensure creativity and innovation, and to bring out the best in both people and organisations Radical departure from the traditional way that many consultants approach organisational interventions, identifying problems in an organisation first and then working on solutions.

- not about fixing things, taking things apart, stripping back, peeling away or problem identification. This presumes that simply by filling the gap between where the organisation is failing and the known and predictable ideal state when everything is fixed, all will be well.

- less prone to initiating negative, blaming and judgemental atmospheres than problem-focussed interventions

- pays attention to what people working in the organisation feel, so any change is not felt to be externally imposed. The questions with which the process starts are a way of paying attention. At the heart of AI is the deceptively simple practice of asking unconditionally positive questions. These are questions that enable participants to identify and then enhance the factors that are present when their system is operating at its best. “Real change begins with the simple action of people talking about what they care about. (Margaret Wheatley in Rendle and Mann, 2003, xviii)”

**Traditional consulting**

the frame of reference; 'organisation as a problem to be solved'

pathology-focussed; disease identification

identify what needs to be fixed; describing symptoms and causes

analysing the causes of the problem

perception of possible solutions

action plans

**Appreciative inquiry**

the frame of reference; 'organisation as 'possibilities to be explored'

health-focussed; life-enhancing

appreciating and valuing the **best of what already is**

imagining **what might be**

dialogue to create **what should be**

innovating **what will be**

**Empirical Process**

define the problem

deficit-based language

fix what's broken

focus on decay

what problems are you having?

learning from our mistakes

who is to blame?

evaluation

experts 'give' treatment

**Basic assumption:** organisations (such as the Church) are a problem to be solved

**Appreciative Process**

search for solutions that already exist

asset-based language

amplify what is working

focus on life-giving forces

what is working well round here?

leaning from what works

who is to affirm?

valuation; giving everyone's story a place in the process

change agents help create a context for growth

**Basic assumption:** organisations such as the Church) are a mystery to be **embraced**

**So how does it work?**

The AI model uses a process of inquiry to discover people's best experiences and use these experiences as a basis for imagining a future and designing the processes and structures that will make the imagined future a reality. This imagined future is not just a fantasy because it is grounded in the experiences of the people involved.

## Appreciative Inquiry 5D model

(You may also come across a four-stage model: initiate, inquire, imagine and innovate)

- |                    |  |
|--------------------|--|
| <b>1 Define:</b>   | commit to the positive; prepare and focus  |
| <b>2 Discover:</b> | interview one another to discover the times when the organisation was at its best        |
| <b>3 Dream:</b>    | envisage the organisation as if the peak moments were the norm rather than the exception |
| <b>4 Design:</b>   | design ways of creating the dreamed-of organisation                                      |
| <b>5 Deliver:</b>  | implement the changes  |

### Phase 1 Define - "Committing to the positive" (set the stage)

#### ***Preparing for an appreciative process***

Awareness of the need for development comes first, as does the preparedness for an appreciative process. Then comes the need to be clear about what it is we really want to explore and find out about. The key is not determining the last step of the journey but where we want to place our feet for the first step. The crafting of an interview protocol – the questions to be used in the one-to-one conversations – is carried out in this phase.

### Phase 2 Discover - "Valuing the best of what is" (appreciate what is)

#### ***Gathering life-giving experience through interview***

The phase in which we discover what is going on and gather good experiences. Questions are asked to help members discover examples of excellence and achievement in their congregations.

*"Think back through your time in this congregation. Locate a moment that was a high point, when you felt effective and engaged. Describe how you felt, and what made the situation possible".*

*"Think back over the past few years to a church event you were part of – a life experience or moment that stands out for you as exceptional, one that left you excited, enthused, energised and empowered. Reflect on what happened and what went on that made this such a memorable event for you".*

Members work individually to map out their stories. Then they share their stories in pairs and ask probing questions such as "If you had to pick one thing that made your experience truly memorable, what would it be?" "What skills helped you?" "What was the key to success?" Others questions home in on personal strengths and contributions. Groups then identify the common themes behind their examples of excellence; in other words people identify a core of strength and continuity around which to build change. People have more confidence, and are more comfortable, in journeying to the future when they carry forwards parts of the past (see *AI Interview Guide for Congregations*, attached).

**Phase 3 Dream – “Envisioning what could be” (imagine what might be)**

***Developing common images of the future***

A future vision is developed based on the common themes that surfaced through the examination of past good moments. Participants imagine what the organisation would look like if the exceptional moments identified in the discovery phase were to become the norm. They develop a picture of the ideal future grounded in the congregation’s reality; the system maintains the best of the past by discovering what it is and stretching it into the future. “What could the church look like if our moments of exceptional success were the norm?” Typically you encourage participants to create both right-brain representations (such as pictures, drama, music, sculpture and movement) as well as more left- brain language description in the form of macro-“provocative propositions”. A macro-provocative proposition is a statement that expresses the desired future that has been envisaged. It should encapsulate a bold ambition and continuity from the past; using phrases that can act as a beacon to provide guidance. Congregations are encouraged to write provocative propositions in the *present* tense as if they were already like that; - e.g. “our congregation values young people as part of its ministering community and provides resources to enable their ministry”. *Be sure the provocative proposition is actually provocative and involves stretch for the organisation. Think big!*

**Phase 4 Design – “Dialoguing what should be” (determine what should be)**

***Developing achievable plans and steps to make the vision a reality***

This next stage in the process involves describing and generating structures or steps that will enable the dream to become reality. It is the stage in which the positive change described in the macro-provocative proposition is made boldly alive in all the organisation’s strategies, processes, systems and decisions. It involves writing a series of more specific provocative propositions as to how the dream can be fleshed out. Through consensus, short and long-term goals are developed to achieve the dream of the future vision. As with all of AI, there is no single way to approach design, but ideally the method you choose should uphold its participative spirit.

**Phase 5 Deliver – “Doing Christ’s work in the world” (create what will be)**

***Co-creating a sustainable, preferred future; asking “who, what, when, where and how?”***

Future strategies and plans are put in place to meet the goals of the ‘provocative propositions’, and roles and responsibilities are assigned. Although any strategy or operational planning methodology can be used, to follow AI principles you must maintain a positive mindset and involve a broad spectrum of people throughout the congregation. It also involves monitoring, evaluation and feedback.

## APPENDIX 4 SWOT

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A planning process that offers a way to create a full and balanced description of the status quo both inside and outside the congregation is the SWOT analysis. SWOT is a description of the **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (sometimes SWOC – **C**hallenges) that face the congregation. These are the internal and external conditions that influence the congregation's condition over time. The process of planning allows leaders to describe these conditions in order to discern a faithful future. The SWOT analysis is most commonly graphed in the following way.

Internal Inside the congregation	<b>STRENGTHS</b>	<b>WEAKNESSES</b>
External Outside the congregation	<b>OPPORTUNITIES</b>	<b>THREATS</b>

In mission planning, the task of the Vestry is to offer an honest and complete description of the congregation's setting in each of the four quadrants of the model. It is important to distinguish between internal and external measures – what is it like inside the congregation and what is it like in the community or the culture outside the congregation? When looking at strengths and weaknesses, the Vestry looks *inside* the congregation to explore what is and what is not done well in terms of mission development. Often this involves looking at the history of the congregation and the commitments that were made or not made over the years. This step includes an acknowledgment of the congregation's strengths and weaknesses, including financial and physical resources.

When looking at opportunities and threats the Vestry looks *outside* the congregation to describe the congregation's setting or context, both local and global. Look, for instance, at the community to see what changes are occurring which afford the congregation opportunities for, or threats to, their life and ministry. The Vestry should look too at the wider culture and assess how changes over time enhance or limit the congregation's ability to live out its goals and purpose.

Such an analysis offers a real and honest portrait of the background against which discerning and implementing a faithful future can happen. It is all too common however for those working with a SWOT to focus in on one or two quadrants – namely the negative (shaded) ones. Rendle and Mann write; “leaders most naturally zero in on the *weaknesses* of congregations as their focal point for planning. In addition they mistakenly fixate on the *threats* that loom both in their community and in the wider culture.” (2003, 20) It is vital to remember that it is the ***strengths*** and ***gifts*** that will support movement into the future. Focussing on weaknesses alone often leads congregations to miss their real potential for ministry or to slide into a depressing state of inertia.

A SWOT “is best used to describe our real gifts honestly. It allows us to understand the limits we face, so that we can authentically use our gifts to address our purpose”. (*ibid*) Such a structured conversation is designed to help the Vestry and congregation be the people that they most effectively can be, given their history, their resources, their setting and their call.

## APPENDIX 5 Bible Studies

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### Feed My Sheep (John 21: 16 - 17)

*When they had finished breakfast, Jesus said to Simon Peter, Simon son of John, do you love me more than these?" He said to him, "Yes, Lord; you know that I love you." Jesus said to him, "Feed my lambs." A second time he said to him, Simon son of John, do you love me?" He said to him, "Yes, Lord; you know that I love you" Jesus said to him, "Tend my sheep." He said to him the third time, "Simon son of John, do you love me?" Peter felt hurt because he said to him the third time, "Do you love me?" And he said to him, "Lord, you know everything; you know that I love you." Jesus said to him, "Feed my sheep."*

How do the clergy and Vestry of a congregation feed and tend the sheep?

### The Good Shepherd (John 10:11-15)

*"I am the good shepherd. The good shepherd lays down his life for the sheep. The hired hand, who is not the shepherd and does not on n the sheep sees the wolf coming and leaves the sheep and runs away- and the wolf snatches them and scatters them. The hired hand runs away because a hired hand does not care for the sheep. I am the good shepherd. I know my own and my own know me, just as the Father knows me and I know the Father. And I lay down my life for the sheep."*

What is the difference between being a sheep and the shepherd? In what ways are clergy and vestry members like the shepherd? What might 'good shepherd' and "hired hand" behaviours look like among leaders?

### Two by Two (Mark 6:7-13)

*He called the twelve and began to send them out two by two, and gave them authority over the unclean spirits. He ordered them to take nothing for their journey except a staff; no bread, no bag, no money in their belts; but to wear sandals and not to put on two tunics. He said to them, Wherever you enter a house, stay there until you leave the place. If any place will not welcome you and they refuse to hear you, as you leave, shake off the dust that is on your feet as a testimony against them." So they went out and proclaimed that all should repent. They cast out many demons, and anointed with oil many who were sick and cured them.*

What would be "excess baggage" (the equivalent of the bread, bag, money and extra tunic) at a Vestry meeting? How does a Vestry proclaim the Good News? How does the Vestry aid in reconciliation and healing in the congregation?



### You Will Be My Witnesses (Acts 1:7-8)

*“It is not for you to know the times or periods that the father has set by his own authority. But you will receive power when the Holy Spirit has come upon you; and you will be my witnesses in Jerusalem, in all Judea and Samaria, and to the ends of the earth.”*

How does a Vestry as a body witness to Christ? How can individual members witness to Christ as they serve on the Vestry?

### The Children (Matthew 19:13-15)

*Then little children were being brought to him in order that he might lay his hands on them and pray. The disciples spoke sternly to those who brought them; but Jesus said, “Let the little children come to me, and do not stop them; for it is to such as these that the kingdom of heaven belongs.” And he laid his hands on them and went on his way.*

How does the leadership of a congregation nurture those who are young, inexperienced or unskilled in the exercise of their ministries in the church?

### The Sower (Matthew 13:3-9)

*And he told them many things in parables, saying: ‘Listen! A sower went out to sow. And as he sowed, some seeds fell on the path, and the birds came and ate them up. Other seeds fell on rocky ground, where they did not have much soil, and they sprang up quickly, since they had no depth of soil. But when the sun rose, they were scorched; and since they had no root, they withered away. Other seeds fell among thorns, and the thorns grew up and choked them. Other seeds fell on good soil and brought forth grain, some a hundredfold, some sixty, some thirty. Let anyone with ears listen!’*

How is the ministry of the congregational leader, clergy or Vestry like the sower? What implications are there for the leaders? How are volunteer ministries in the congregation like the sower? What, if anything, can be done about that?

### Servants (Mark 10:42-45)

*So Jesus called [the disciples] and said to them. “You know that among the Gentiles those whom they recognize as their rulers lord it over them, and their great ones are tyrants over them. But it is not so among you; but whoever wishes to become great among you must be your servant, and whoever wishes to be first among you must be slave of all. For the Son of Man came not to be served but to serve, and to give his life a ransom for many.”*

What does it mean for a leader in the church to be a servant? How do the servants know what those who are to be served want or need?

## APPENDIX 6 Sample Covenant/Contract from the American Episcopal Church

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*Recognising that Holy Scripture will be our authority governing our behaviour and relationships with one another and with the congregation, and acknowledging St Paul's directive to Timothy (1 Tim 4, 12) concerning his role as church leader to be "an example to the believers in speech, life, love, faith and purity", we therefore agree to the following covenant.*

### **To love one another by:**

- Creating and nurturing within the Vestry a safe and trusting atmosphere in which all members can feel comfortable and confident in expressing their thoughts and opinions
- Being sensitive to the different styles and personalities of individual Vestry members
- Seeking to validate, appreciate, acknowledge and understand the unique and special gifts of each Vestry member
- Treating each Vestry member with respect by:
  - Speaking and acting in such a way as to build up and support one another
  - Confronting issues without demeaning anyone
  - Refusing to listen to backbiting or gossip about any other Christian, especially of our church leaders
  - Insisting that people who have accusations to be made against another church leader do so in the presence of that individual
  - Recognising that certain discussions are of a confidential nature, thus maintaining good, wise judgement in respecting that confidentiality
  - Confronting with love those who have hurt me in any way
  - Following St Matthew's principle (Matt 18, 15-17) for conflict resolution between individuals: speaking first to the individual alone; if to no avail, bringing in another (Vestry) member and then, if necessary, finally referring the matter to the larger church (entire Vestry)
  - Practicing forgiveness for those I feel have wronged me
  - Seeking to encourage those Vestry members who may be suffering through trials of one kind or another
  - Nurturing a servant attitude in that the Vestry's role is that of serving both God and His church

### **To seek God's will by striving for unity in all matters through:**

- Joining with the entire Vestry in submitting significant matters to prayer, especially prior to voting or decision-making
- Upholding the final decision of the Vestry even when I may disagree
- Always seeking to better understand others
- Submitting to one another in love
- Refraining from all discussions and conversations that are unwholesome and divisive
- Consciously seeking to abandon personal agendas and self-serving attitudes

### **To be an example to the congregation by striving to:**

- Faithfully attend Sunday worship
- Consistently engage in study of the scriptures
- Live out the Christian life through regular, sacrificial giving
- Support the church through active attendance and participation
- Be faithful to St Thomas' mission statement

*In summary we will, in the words of St Paul to the Colossians (Col 3, 12-14), as God's chosen people, holy and dearly loved, seek to clothe ourselves with compassion, kindness, humility and patience. We will bear with one another and forgive whatever grievances we may have against each other. We will seek to forgive as the Lord forgave. And over these virtues we will put on love which binds them all together in perfect unity.*

## APPENDIX 7 Sample Vestry Away-Day programme

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10.30 Assemble and coffee

10.50 **CONTEXTUAL BIBLE STUDY MARK 6, 30-44**

12.00 **EUCHARIST**

12.30 **LUNCH**

13.20 **LOCAL LANDSCAPE**

Congregational-development-for-mission; our story so far

13.50 **ROOTS**

In twos, and then in plenary, identify those things which nourish our community and which we hope to draw upon in future.

14.00 **BACKGROUND LANDSCAPE**

Congregational development for mission; stories, methods and resources - and questions

14.40 **LEAVES**

In threes, identify from the stories above those aspects which we hope to tap into and grow here. In plenary, we will stick them on the tree. Discussion

15.00 **BIRDS and MAGGOTS**

In plenary, identify those things that come in from outside ('birds') which might get in the way of such future planning and those things from within ('maggots').

15.15 **FRUITS**

Prioritizing what we will grow; choosing the top three goals for the coming year and thinking about how to develop specific steps towards implementing those

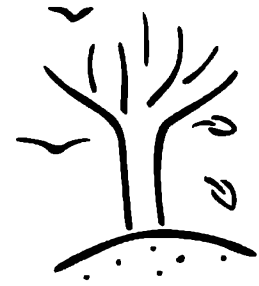
15.50 **CLOSING WORSHIP**

*Blessed is anyone who trusts in the Lord, and rests his confidence on him.  
He will be like a tree planted by the waterside,  
that sends out its roots along a stream.*

*When the heat comes it has nothing to fear; its foliage stays green  
Without a care in a year of drought, it does not fail to bear fruit.*

*Jeremiah 17, 7-8*

16.00 Tea and depart



## APPENDIX 8 Mutual Invitation Bible Study

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Opening Meditation and Prayer: Take a few deep breaths and exhale slowly. (*silence*)

As you exhale, let go of the tensions and anxieties that you have brought with you so that you can fully be in this time and space (*pause*),

to be with one another and with God. (*silence*)

Are you willing to let something new happen? (*silence*)

Can you be open to the Spirit of Christ as it speaks to you in the scripture, to one another, and in your own heart? (*silence*)

Let us pray: O God, you have taught us that your Word is a lantern to our feet and a light to our path: grant that as this community devoutly reads the Holy Scriptures, we may realize our fellowship one with another in you, and may learn to know you more fully, to love you more truly, and to follow more faithfully in the steps of Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God blessed forever more. Amen

Ground Rules.

**B** = The **Bible** passage, and not the leader of the group, is the focus of the study.

**I** = We are not here to debate **Interpretation**, but to read the scripture and share **Insights**

**B** = We invite you to adopt a **Beginner's** mind, so that you hear the text as if it were for the first time.

**L** = Our **Leaders** are not experts. They are but facilitators who lead us in a process in which the inspiration from scripture can be shared and celebrated.

**E** = We are all **Equals** before the text regardless of our background, because insights come to us when our unique **Experience** intersects the scripture.

Step 1: The opening meditation and prayer are read.

Step 2: The passage is read slowly, after which individuals are encouraged to offer a word, phrase, or image that speaks to you in the passage.

Step 3: The passage is again read slowly, after which a question is posed by the leader. Each participant will be invited to share his or her insight using the Mutual Invitation Process. (see below)

Step 4: The passage is read again, typically at the end of the meeting, and the participants are invited to silently reflect on the question, "what does God invite me/the Vestry to do, be, or change through this encounter with Scripture and our time together?"

**Mutual Invitation Process.**

If the group is larger than eight people, turn to one another in groups of four.

- The passage is read and a period of silence will follow.
- After the period of silence for reflection, the leader of the group may invite another to offer a reflection on a specific question.
- Each person may speak for a maximum period of time (usually 1 to 1 ½ minutes) and then in turn invite another to speak.
- If you do not wish to speak you may pass, but then invite another.
- When a person is speaking, no one is to interrupt; this is not a group discussion.
- The only questions allowed are questions of clarification.

**Closing Prayer Circle.**

Invite participants to join in a circle and mentally to complete the sentences:

- I thank God today ...
- I ask God today ...

The leader will begin by sharing his or her own prayers, and then squeezes the hand of the person on the right. This will be the signal for the next person to share. If the person does not wish to share out loud, he or she can simply pass the squeeze to the next person in turn. When the squeeze comes back to the leader, the leader invites the group to join in saying the Lord's Prayer.

## APPENDIX 9 Contextual Bible Study

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Since the Provincial Conference of 2004 many congregations have woven CBS into the fabric of their committee life to good effect, and several use a shortened form of the method at the start of meetings. Time constraints would not allow a full-blown CBS to be carried out in the course of a normal Vestry meeting, but why not engage in this method of scriptural study at a Vestry Away-Day or Vestry Quiet Day?. An introduction to the principles and practice of CBS are outlined here. The texts and questions used in 185 sessions exploring 94 different Scripture texts are available on line at [www.scottishbiblesociety.org](http://www.scottishbiblesociety.org). Access can be gained by following the *Conversations* link.

Contextual Bible Study develops a method of reading the Bible which is based on Liberation Theology. Liberation Theology originated in the countries of the developing world in the twentieth century. The immense poverty and destitution of the people therein challenged them to read the Bible in the light of their experiences of oppression. Liberation Theology argues that the Bible is concerned not only with the salvation of individuals but also with social transformation. It looks to the Book of Exodus as a key text, since it describes the liberation of the Israelites from slavery in Egypt. God listens to the cries and suffering of the people and intervenes to bring them to freedom. Similarly Liberation Theology argues that God listens to the marginalized today – all those whom the structures of society oppresses, be it because of poverty, colour, race or gender – and calls us all to create a just society for everyone.

‘praxis’: a concept which finds its fullest expression in Marxist philosophy, where it denotes integrated thought and action for revolutionary change. In that bond of action and reflection is the discovery that, as Liberation Theologians put it, ‘knowing God is doing justice’

Liberation Theologians argue that theology begins with the questions that arise from our daily lives; these questions are then applied to the Bible in order to seek God’s will for today, and result in transformative action. The process is akin to the well-known See-Judge-Act spiral. Knowledge of God is sought through a critical reflection on ‘praxis’, the action and practice of the poor in seeking their liberation from every kind of oppression. The vital point is that the process of theologizing *starts with the experience of those who are suffering oppression*. It privileges that, makes it valid and vital; it allows voices and opinions to be heard that otherwise would go unheard.

Contextual Bible Study uses the same principles, giving a voice to all participants in the conversation regardless of status. Contextual Bible Study (often shortened to CBS, as here onwards) seeks to identify the key concerns of each group that participates in it, and to interpret the Bible in relation to that context. Participants are encouraged to bring their own experience to the study of scripture and not to rely solely on the academic authority of biblical scholars, commentaries or clergy. It is an energizing and transformative approach to scripture in which there are no experts; through the power of the Holy Spirit,

all are called to be interpreters.

**The AIMS of the CBS approach to Scripture Study are:**

- to enable groups of people, especially those at the margins of our society and churches, to hear God speaking to them through the Scriptures
- to enable people, in communities and other groupings, to illuminate their own context and experience in the light of their reading of Scripture
- to encourage people to read the Scriptures with other people who come from different contexts and with different life experiences
- to enable people to discern the life-giving presence of God even in situations of darkness and conflict
- to enable people to deepen their love and knowledge of God, the Scriptures and one another
- to enable people to identify and implement practical and life-enhancing ways of transforming themselves, their communities and their society.

Actions are then planned based on that conversation between scripture and experience, actions which seek to transform the status quo in the lives of the participants and their communities. The process continues with further reflection on those renewed actions, and the bringing of scripture into conversation with the *new* questions that have arisen in the course of this experience. Through

such a spiral, “a circle on the move”, individuals and communities are gradually transformed through their discernment of God’s will for them in their particular situation; “thy Kingdom come, thy will be done on earth...”

## PRINCIPLES

In short, Contextual Bible Study is a fresh, participative and exploratory approach to *reading scripture in community* inspired by the values of Liberation Theology, and in particular by the approach developed by the Institute for the Study of the Bible in Pietermaritzburg when reading scripture with township groups during the Apartheid years. In CBS, participants are encouraged to engage actively with the scripture text and with one another, bringing their own, valid, experience into play in the conversation. By listening actively to the text and then working collaboratively through a series of pre-set questions about it with the help of a duet of facilitators, participants are enabled to move towards some sort of faith-in-action response, a response that seeks to transform the status quo at both an individual and a corporate/community level.

### **i) Theological Principles:**

- belief in the liberating and transforming power of God's Word in the Scriptures and in people's lives
- belief that the presence of this power can be discerned especially through the insights and concerns of the poor and oppressed in society, and of those who are often voiceless in our faith communities
- belief in the value of creating a dialogue between the Scriptures and the lived experience of contemporary humanity – between the original and ongoing context of the Scripture and the actual context of the group who have gathered to share the Word
- belief that, as the community of believers, all Christians are called to express their faith in action that seeks to transform the world

### **ii) Group Dynamic Principles:**

- belief that all participants bring to the group their own special contribution of experience, insight and faith
- belief in the encouragement and inspiration that can arise through a positive experience of sharing one's faith in a group context
- belief that there is a spectrum of skills present within any participant group and that the particular spectrum available on the day will enable the CBS process and nurture the group
- belief in the value of engaging participants together in a dynamic dialogue rather than in a more passive 'expert – recipient' style of relationship
- belief in the positive role of skilled facilitation
- a preference to work as a pair or team of facilitators whenever possible

### **iii) Methodological Principles:**

#### ***taking a SHARED PRAXIS approach***

- A Praxis approach seeks to unite one's reflection and action in an ongoing and mutually enriching dynamic: reflection leads to action, which leads to further reflection, which leads...
- This is familiar to many people in the 'see – judge – act' model.
- Shared Praxis seeks to apply the praxis approach within a community or group setting – or context.

#### ***taking a COMMUNAL, CLOSE, CONTEXTUAL and CRITICAL reading of Scripture***

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- COMMUNAL: reading as a group; sensitive to the word spoken afresh in the particular community gathered around the Scriptures on this occasion
- CLOSE: reading the chosen text with care; honing together the group's interpretative skills and theological reflection
- CONTEXTUAL: being attentive to the language and structure of the text itself; attentive to the context of that text in the history of God's people; and attentive to the context of the group gathered today
- CRITICAL: discerning the interests and experiences that shape our readings of the Bible and also the different views that are to be found in the Scriptures.

***encouraging TRANSFORMATION of the individuals and group in their particular social/religious contexts***

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**PRACTICE**

Facilitators aim

- to run the session in accordance with CBS principles and process
- to create an open and non-threatening atmosphere
- to enable a 'dominance free discourse'
- to encourage every participant to take part fully in the session at their own level

The facilitators are the main enablers in the group. Their responsibilities include that of encouraging respect and openness, listening and sharing, dialogue and discussion, and that of discouraging contention and disputation, conflict and aggression, intellectualisation and spiritualization. They also need to try to keep participants to the topic and to time, and to stop any one person dominating the group. Think in terms of inviting - rather than forcing - people into sharing by means of open questions that allow for exploration and dialogue.

It is best practice to work in pairs, with one person asking the questions and encouraging participation and the other writing up the group's insights onto a flipchart which all can see (numbering the pages sequentially as they go – it is good practice to give participants back a typed copy of the flipchart jottings after the session). Swap roles after each question. The person who is flip-charting the responses should try to capture the exact phrasing used by participants, rather than 'translating' them into their own language. Using the participants' exact words honours the contributors and symbolises the validity of their contributions. Make sure your writing is big enough for the group to read. The full sheets can be hung on the walls or placed on the floor around the visual point.

All the session participants are considered to be the 'readers' of the text. The role of the facilitators is to encourage each participant to share their own special contribution of experience, insight and faith. Together as a group they provide the spectrum of skills that will enable the text to be explored *on this particular occasion*.

A CBS session aims to promote a 'dominance-free discourse', where all the voices in the group are encouraged to take part as best they can, without any one person dominating – including the facilitator. Clearly some participants may have wider or more specialist knowledge than others about issues that arise, biblical and other. Their particular skills should be identified and their contribution employed for the benefit of the whole group. Facilitators need to be sensitive to the balance of these contributions and prevent their contributors taking over the discussion, thus effectively excluding or disempowering other members of the group.

You can adjust the process to work with any group size; we have seen it used with groups from four to over a hundred. However the process works most easily if you have enough people to break into groups of three and then later reform into the full group. People tend to speak more freely in threes than in the full group. Have a plan of how you would like the session to run: when you will be asking people to reflect on their own, when to work in threes or medium-sized groups and when you want to work as a full group. If required you can adapt the plan as the session progresses.

### ***Setting the scene/atmosphere***

It is important for the team of facilitators to create an atmosphere that will best enable the work of the sessions. In dynamic terms this will involve establishing a sense of trust, mutual respect and sharing among the participants. In physical terms this will involve creating a comfortable and welcoming environment. Normally the facilitators would help create a prayerful atmosphere by setting up a tasteful visual focal point, perhaps containing a Bible, candle and a colourful piece of cloth or other symbol relating to the topic under discussion. Each study begins with a short focal prayer and closes with prayer. Facilitators and groups are encouraged to experiment with prayer texts and styles from a variety of sources and Christian traditions.

### ***The text***

It is useful to provide every participant with an identical copy of the text being explored, preferably on one A4 page. This helps the participants to focus on the chosen passage rather than widen their reflection to other related - or unrelated - passages. Using one translation in this way helps people focus

on the content and meaning of the text rather than on the differences between versions; you can, of course, vary the translation used over a *series* of CBS sessions; unfamiliar versions can throw new light on familiar passages. At the beginning of a CBS, the text is read out by the participants. The way this is done can also enhance a session. We encourage facilitators to explore different styles:

- some texts are better read by a single voice, perhaps then repeated by another
- you may choose to read a verse at a time around the group
- some may be read in two to three sections by different voices
- other texts may be read aloud by the whole group
- some texts, like the psalms, lend themselves to being read in two 'choirs'
- others may lend themselves to being

separated out like a play into the characters and the narrator; prepare this by highlighting the parts in advance

### **Reading in public**

If you are asking people to read out loud in public, remember that not everyone feels comfortable doing so. Always give people the choice whether or not to read. If asking someone to read a longish or difficult passage, it is better to give them time in private to prepare. If you are inviting people to read something round the circle, always say something like, "If, for any reason, anyone does not feel comfortable reading out loud in a group, just tap the person beside you and they will read on next. No problem." This leaves people free to read or not read out loud at their own discretion.

#### *What does the title 'Contextual Bible Study' mean?*

The 'context in the title can be understood in several ways, like looking at the Scriptures through different lenses:

- the historical/religious/social context which lies behind the passage being explored.
- the literary/canonical context of the passage
- it may take into account how the selected passage has been read in different historical/religious/social contexts in the course of the history of God's people
- the historical/religious/social context of the contemporary participant group

Each of these lenses may contribute usefully to a CBS session. The facilitators bear the main responsibility for selecting the best balance of lenses for the particular occasion. Traditionally in CBS there are three ways of reading the scriptures. These are complementary and can be overlapped within a session.

#### 1) Reading 'behind' the text

Here the reading is approached from the historical/cultural/sociological context of the text – what lies behind the text, the situation and circumstances in which the text originates

#### 2) Reading 'the text itself'

This approach focuses on the literary content of the text and the words, images, characters, emotions and styles within it

#### 3) Reading 'in front of' the text'

Approaches the text from a thematic point of view – either by focussing on the metaphors and symbols of the wider sweep of scripture or focussing on a theme chosen by the particular reading group. This seeks to relate the reading closely to the contemporary context.

Remember, no single or series of CBS sessions will ever answer all the questions or issues that can arise out of a piece of scripture. People should be encouraged to go on and find further opportunities to read, study and discuss more in order to develop their knowledge of scripture.

## **APPENDIX 10 Understanding Vestry responsibility under the Charities and Trustee Investment (Scotland) Act 2005**

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*(The General Synod Office issued guidance to Vestries in an Information Note (October 2007 edition) on how to meet the requirements of the new Regulations. A copy of this Information Note is available for downloading from the Scottish Episcopal Church website [www.scotland.anglican.org](http://www.scotland.anglican.org) but here we highlight some of the salient points).*

At the beginning of April 2006, a number of the provisions of the Charities and Trustee Investment (Scotland) Act 2005 came into force. This Act makes for extensive changes to the manner in which charities operate and are regulated within Scotland. In particular, it creates the “Office of the Scottish Charity Regulator” (OSCR). OSCR is the body which determines whether organisations should have charitable status, maintains a public register of charities, encourages and monitors compliance with the Act and investigates apparent misconduct and takes remedial action. The Act has a number of implications for Churches and the purpose of this note is to highlight some of these so that they can be drawn to the attention of your Vestry and its members.

It is important that all individuals holding office in the Church are aware of their responsibilities under the new Act. The principal areas of compliance identified in the Act are set out below. OSCR has also published its own “Guidance for Charity Trustees” which is available from the OSCR website [www.oscr.org.uk](http://www.oscr.org.uk)

Under the Act, “charity trustees” are defined to mean “the persons having the general control and management of the administration of a charity”. This would include Vestry members and it is recommended that all existing and future Vestry members be provided with a copy of this note. Perhaps somewhat confusingly, many congregational constitutions will also include reference to “trustees”, other than the members of the Vestry. The main purpose of those trustees is normally to hold property on behalf of the congregation. In most cases, however, Vestry members will be the individuals having the control and management of the administration of the charity for the purposes of the Act and will therefore fulfil the role of “charity trustees”.

It is important to note that under the Act, certain limited categories of people are disqualified from serving as charity trustees (e.g. Vestry members). If such a person serves as a charity trustee they commit a criminal offence. Principally, the excluded categories are those people who have been involved in dishonesty or financial insolvency. In order to ensure that a disqualified individual is not unwittingly appointed to the position of charity trustee (for example by being elected as a Vestry member). It is recommended that any person serving on a Vestry or seeking election or appointment to

Vestry should sign a short declaration confirming the fact that they are not disqualified. A style of declaration is downloadable from the Scottish Episcopal Church website [www.scotland.anglican.org](http://www.scotland.anglican.org) and it is recommended that completed declarations should be held by the Vestry Secretary with the Vestry records. Clergy who sit on Vestry should similarly be invited to sign such a declaration. (OSCR has power to allow an individual who would otherwise be disqualified but an application would need to be made to OSCR before such an individual were to be appointed as a charity trustee.) It should also be noted that if an individual, having been appointed as a charity trustee, at some later date becomes disqualified that person should immediately resign as a charity trustee.

The Act sets out specific duties for charity trustees. A charity trustee must act in the interest of the charity and must, in particular:

- a) seek, in good faith, to ensure that the charity acts in a manner which is consistent with its purposes. This will mean, for example, that none of the assets of the congregation are applied to any non-charitable purpose.
- b) act with the care and diligence that is reasonable to expect of a person who is managing the affairs of another person. This requirement would include regular attendance at meetings, careful attention to written reports and minutes and the ascertaining, whether by the questioning of other office-bearers attending meetings or otherwise, of all information necessary for the making of decisions. At times, vestry members may be called upon to take decisions concerning matters about which they are not competent to make judgements. In such cases, the safe course is to postpone taking any decision until further advice has been obtained from a suitably qualified person. This might include consulting with the Diocesan Registrar or Diocesan Treasurer.
- c) ensure that the charity complies with any direction, requirement, notice, or duty imposed on the charity by virtue of the Act. This would cover matters such as the requirement to show that the congregation is a charity on a range of stationery and other documentation (see further below) and the duties in regard to the preparation and lodging with OSCR of accounts and the annual return. Any breach of this duty is to be treated as "misconduct" in the administration of the charity. Where there has been any such breach of duty, all charity trustees must take such steps as are reasonably practicable to ensure that any such breach is corrected by the trustee concerned and not repeated and that any trustee who has been in serious and persistent breach of such duties is removed as a trustee.
- d) in circumstances capable of giving rise to a conflict of interest between the charity and any person responsible for the appointment of the charity trustee, the trustee must: i) put the interests of the charity before those of the other person, or ii) where any other duty prevents the charity trustee from doing so, disclose the conflicting interest to the charity and refrain from participating in any deliberation or decision of the other charity trustees with respect to the matter in question.

## APPENDIX 11 Possible Interview Questions

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The following typical areas of concern may suggest how you can design a pattern of questions. These should be based on your own Profile and the credentials of the people being interviewed. They can also be related to ministry specialities and other information on record. For each category, your objective is to discover what seems likely to happen in the life of the congregation if this priest is called. There is no right or wrong response in any of these areas. Each response contributes toward deciding whether this priest and this charge are likely to move together in directions each party wants.

Worship-Liturgy-Music	Preaching
Christian Education	Growth
Spiritual Development	Administration
Pastoral Care/Counselling	Social Issues
Personal	Mission
Ecumenism	

### WORSHIP-LITURGY

When the priestly leadership of a charge changes, there are likely to be some changes in its worship and liturgical life. The principal concern is for both the interviewing committee and the priest to determine the other's attitudes and convictions about worship and liturgy. Key questions therefore might be:

*How do you make decisions about worship?*

*Tell us how you have introduced new experiences in worship in your congregation.*

The responses will indicate the priest's attitude toward the traditions of the parish and her/his sensitivity to worshippers. Some questions about worship may be resolved by what is seen and experienced in a visit to a worship service in the priest's present parish. This will give opportunity to observe first-hand the priest's own style and delivery: in prayer, preaching, celebrating, perhaps in singing, and in participation by laity of all ages.

The committee should understand that the style and schedule of worship in the priest's present parish is not necessarily what s/he prefers or would choose - or would duplicate in another situation. It is entirely appropriate to ask questions about anything that is observed and that is relevant to the position. Visiting a service at a candidate's charge will also provide an opportunity to observe the priest's relationship with the congregation and with individuals participating in the liturgy. However, these informal observations should be verified through reference-checking or some other way.

## PREACHING

It is impossible to arrive at a fair evaluation of a priest's preaching from hearing one sermon; and there are wide ranges of specifications for what constitutes "good" preaching or a "good" sermon. It may be necessary to have considerable discussion in the committee before questions about preaching are framed. Some helpful questions (which have no right or wrong answers) might be:

*How do you go about preparing your sermons?*

*Tell us about some of your satisfactions and disappointments in preparing and delivering sermons.*

*In preparing your sermons, what use, if any, do you make of the Bible, the church year, personal experiences (your own or that of others); current events, contemporary issues in culture and society?*

*What sources do you use for sermon ideas?*

*What different methods do you use for preparing and delivering sermons? How often do you write out the entire text or speak extemporaneously?*

*How long do you preach?*

*How do you involve the congregation in your preaching?*

*How important do you consider preaching to be in the total life of the Church? What do you do with a sermon after you have delivered it?*

*How do you use guest preachers?*

## CHRISTIAN EDUCATION

In discussing Christian Education, a committee is likely to be interested in some of the following elements in a priest's responses: level of creative energy range of resources used; familiarity with various curricula; training and trust of lay people in various roles; levels of direct personal involvement and of the priest's personal competence in education. The topics discussed may include all levels of the parish's educational programme now and hoped-for: adult education, Bible study groups, Sunday School, youth/young adult programs, Lenten study, and preparation for baptism/confirmation. Questions might be phrased something like this:

*How do you view Christian Education: its role in parish programs? How do you recruit, train, assist and supervise teaching staff?*

*Tell us about one of your recent adult education (or youth) programs. What are some of your favourite tools and resources for Bible study?*

*How do you involve parents in the formation/education of children? What do you expect people of various ages to learn or retain through the*

*Christian Formation/Education program? What curriculum do you use and why?*

## GROWTH

Growth in membership is a matter of concern to many Episcopal congregations. It must be discussed in the context of trends and realistic expectations of the specific charge and community. Many congregations whose Profiles list growth as a goal are not willing to make the changes necessary to achieve growth. If growth is a goal and is stated in the profile, questions such as the following are appropriate:

*To the extent that you know us thus far, what do you think we will have to do to increase membership?*

*What experience have you had with increasing membership -what works well for you?*

*What do you as a priest expect to contribute to growth in a parish - and what do you expect of lay people?*

*What factors inhibit or support parish growth, in your experience?*

## SPIRITUAL DEVELOPMENT

To frame your questions about spirituality, you must first have some agreement among yourselves.. Episcopalians' views of spirituality are shaped by a rich and varied heritage of writing and teaching, experience and examples. What usually concerns an interviewing committee is not the priest's spiritual journey alone, but rather what will happen when the priest and the parish undertake a spiritual journey together; how s/he will guide, direct and accompany people? You can begin by asking:

*Tell us how you and your present congregation have grown in your spiritual life: separately and together.*

*Tell us how you teach people to pray.*

*What are some of the resources you would bring for spiritual development in the congregation?*

*How do you teach the use of the Bible in prayer?*

*What is your experience with various traditions of direction - retreats, quiet days, prayer disciplines, renewal, Cursillo, private confession, observance of feasts, fasts, and days of obligation?*

*Where have you recognized the life of the Spirit in the midst of the life in the contemporary world?*

*Tell us some ways in which you have seen spiritual growth in yourself or in someone else.*

*What kinds of resources refresh you spiritually?*

*What kind of difficulty have you observed in personal spiritual life; your own or someone else's?*

It is not always easy to discover a deep and contagious personal faith in another person, even a priest. But spiritual compatibility can be expressed in unexpected ways. Try to remain open to pleasant surprises.



## PASTORAL CARE AND COUNSELLING

Parishioners look to clergy for counselling and pastoral care at times of personal crisis, especially at key transitions: birth, death, marriage, divorce, vocational stress or change, physical or mental illness. It is appropriate to ask a priest to talk about his/her response to people in such situations. For example:

*What kinds of pastoral care can parish members expect of you? How much responsibility for visitation do you share with laity?*

*Which areas do you find difficult to share?*

*How do you prepare people for great sacramental moments, such as baptism, marriage, confirmation, penance?*

*How much time do you spend in marriage counseling before you refer a couple to a specialist?*

*How do you work with:*

- *troubled teenagers?*

- *persons involved in abuse of alcohol or drugs?*

- *family and patient in a lingering terminal illness?*

*What do you teach about grief and bereavement?*

*What do you do about people who are not members of your parish who come to you for pastoral care/counseling?*

*How do you deal with your own limitations in counseling?*

*How do you provide for pastoral care when you are not there? (e.g. on your day off or during your vacation)*

## SOCIAL ISSUES

Contemporary ministry, for priests and lay people, takes place in a society where stresses spark controversy. It is important for a priest and search committee to know where they agree and where they differ, not only on specific issues, but in the manner of expressing and demonstrating Christian social responsibility. One way to open this discussion would be to name a few current social issues and to speak briefly about the parish's own experience in dealing with them. An open-ended invitation to the candidate to relate experiences may be helpful. Here are some examples:

*Tell us about a time when you dealt with disagreement on a social issue. How have you worked with differences in lay and clergy responsibilities to express Christian witness on social issues in the community?*

*How have you led parishioners to express their witness on social issues?*

*How have you enabled people to discuss controversial issues and to share their honest differences?*

## ADMINISTRATION

An incumbent faces a wide range of administrative responsibilities. Discussion in this area should relate to your charge more than to where the priest has been. At the outset of this portion of the interview, the priest may have more questions to ask than the committee has. It may be well to provide in advance, or through an introductory statement, some details about the congregation's expectations of administration and the resources or help that will be provided. For example, the priest may want to know:

*What is the composition of the staff: assistant clergy, organist, administrator, bookkeeper, etc.?*

*What administrative responsibilities are handled by lay people - and how well are they being done?*

*How does the Vestry handle: personnel matters, budget and finance, job-related expenses, bulletins and mailings, maintenance and emergency work on grounds and buildings (including Rectory)?*

As these matters are discussed, the priest's questions and responses will give many clues about individual style and values in administration and need for support (staff and financial). The interviewing committee might want to ask:

*How do you manage work through other individuals? Through groups or committees?*

*How do you maintain a balance of power among various power groups in a parish?*

*How do you deal with staff changes? How do you recruit and train volunteers?*

*How is the agenda prepared for vestry meetings?*

A priest's own sense of administrative skills and values may be evident in his/her present parish, so visitors to a candidate's present parish may learn something by noting: the quality and comprehensiveness of parish bulletins and publications; involvement of stewards/welcomers, acolytes, Lay Readers, choir, and altar guild. Positive ratings on any of these may be signs of credit to the administrative skills of the priest. A negative rating may not reflect negatively on the priest, but is probably worth discussing. Many clues about administrative skills will also emerge in the way a priest handles the correspondence and arrangements during negotiations towards interview time. The way s/he organizes and administers her/his own affairs will tell a good deal about the way s/he can be expected to organize and administer in the life of the congregation.

## PERSONAL DIMENSIONS

A good many personal questions are illegal for pre-employment discussions. Respecting this, an interviewing committee must also be guided by the principle: "Don't ask a question that you would not answer for yourself." But personal questions may reflect your concern about caring for the priest and family. It is generally assumed that a parish priest is to some degree a public person. Therefore, considerations go beyond ordinary "employment matters," to include the expectations of a personal

relationship. Therefore, some personal discussion is proper. The areas of discussion should be sensitively considered by the search committee among members, in advance, and tested by addressing questions to each other. Appropriate questions might be:

*What do you want us to know about:*

*goals of your own professional development?*

*how you schedule and use your time off?*

*what books you are reading?*

*what you do for fun?*

*your likes/dislikes about the way your life and ministry have evolved over the years?*

The committee should not use the interview to initiate questions relating to marital history, sexuality, personal financial matters, or past history of substance abuse or mental illness. An effective background check may identify some of these issues. If such matters are of concern to the committee, a means of dealing with them should be worked out before the interview. Generally the bishop or one of his/her staff members can help resolve any such questions regarding a promising candidate.

Questions relating to the areas of

**MISSION**

and

**ECUMENISM**

are not offered here as they will tend to be linked very intimately with the context of your charge: the programmes you have used, the local connections you are currently involved in – and those you hope to engage in in the future.

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## SUGGESTED FURTHER READING

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### (i) General reading

- ECUSA/TEC *The Vestry Resource Guide: Servants Called to Leadership* vols I and II Episcopal Church Foundation (2005)
- The Vestry Resource Guide; Now That You're on the Vestry* vol III Episcopal Church Foundation (2004)
- Farnham, S. *Listening Hearts: Discerning Call in Community* Morehouse Publishing (1991)
- Freeman, L. H. *Doing Holy Business The Best of Vestry Papers* Church Publishing (2006)
- Morris, D and Olsen, C *Discerning God's Will Together: A Spiritual Practice for the Church* Upper Room Books (1997)
- Olsen, C. *Transforming Church Boards into Communities of Spiritual Leaders* Alban Institute (1995)
- Rendle, G. and Mann, A *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* Alban Institute (2003)
- Standish, N.G. *Becoming a Blessed Church: Forming a Church of Spiritual Purpose, Presence and Power* Alban Institute (2005)
- "Divine Coincidences" pps 17-33 in *From Nomads to Pilgrims: Stories from Practising Congregations* eds Diana Butler Bass and Joseph Stewart-Sicking Alban (2006)
- Webber, C. L. *The Vestry Handbook* Revised Edition Morehouse Publishing (2000)

### (ii) Appreciative Inquiry

- Branson, M.L. *Memories, Hopes and Conversations: AI and Congregational Change* Alban (2004)
- Carter, D. 'Appreciative Inquiry' pps 25-28 in *Training Journal* September 2005
- Chaffee, P. 'Claiming the light: Appreciative Inquiry and congregational transformation' pps 67-106 in *A Guide to Resources for Building Congregational Vitality* Alban (2005)
- Hammond, S. and Royal, C *The Thin Book of Appreciative Inquiry* Thin Book Publishing Co. (1996)
- Lessons from the Field: Applying Appreciative Inquiry* Thin Book Publishing Co. (1998)
- Phillips, S. 'Appreciative Inquiry: what it is and how it works' pps 30-35 in *Training Journal* October 2004
- Smedley, L. 'Confessions of a reformed Problem-Solver' *Congregations* Alban Nov/Dec 2002
- Watkins, J. M. and Mohr, B *Appreciative Inquiry: Change at the Speed of Imagination* Jossey-Bass (2001)

(iii) Interviewing

All the following are available from The Alban Institute [www.alban.org](http://www.alban.org) or from the General Synod Office library.

Ketcham, B. *So You're on the Search Committee*

and Hahn, C. A.

Mead, L. *A Change of Pastors and How It Affects Change in the Congregation*

Nicholson, R. S. *Temporary Shepherds: a Congregational Handbook for Interim Ministry*

Oswald, R.M *Beginning Ministry Together: the Alban Handbook for Clergy Transitions*

Heath, J and A.

Vonhof, J. *Pastoral Search: the Alban Guide to Managing the Pastoral Search Process*

White, E. A. *Saying Goodbye: a Time of Growth for Congregations and Pastors*

A helpful compendium of resources for Vestries involved in interviewing is to be found via this link

[http://www.episcopalchurch.org/109541\\_21176\\_ENG\\_HTM.htm](http://www.episcopalchurch.org/109541_21176_ENG_HTM.htm)

Reader 1. "Creating "Breadlike" Boards Charles Olsen Excerpted from *Transforming Church Boards into Communities of Spiritual Leaders* © Alban Institute (1995)

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Many new board members expect board participation will be an opportunity for personal faith development only to find a long, parliamentary-ordered, business-as-usual meeting. While asking for bread, they felt they had been given a stone. "Stonelike" boards are those that do not attend to personal needs and aspirations. Stonelike boards try to make too many decisions. Dr. Tom Savage, president of Rockhurst College, observes that most boards can make only one or two good decisions in a given meeting (perhaps in a year!). Considering this, adequate time and attention should be given to the really big issues over a span of meetings. Stonelike board meetings are repetitious. Stonelike boards are seduced into acting as a committee of the whole in response to incomplete committee reports or half-baked recommendations. Stonelike boards rely upon and are partial to assertive, verbal, and left-brain-oriented people. Stonelike boards rush to judgment, making decisions with inadequate lead and reflection time, with inadequate information, and without prayerful discernment. Stonelike board meetings may be cut and dried, with the real decisions having already been made by the pastor or staff. Board members are left with little power to act or lead.

"Breadlike" boards allow for bonding and trust to build as a community of faith is formed. Breadlike meetings are centered and focused by scripture on images of God and the people of God in community. Breadlike meetings take the time to prayerfully discern God's leading and call. Breadlike boards have farmed out many operational decisions, entrusting them to other people and groups that have been empowered and commissioned to act. Breadlike boards look at the "whole forest" and to its future. Breadlike meetings integrate inspiration with governance and feel more like "worship" than "meeting."

One pastor observed that board members, looking toward adjournment, tended to "check off" each report, wondering what time the meeting would be finished. He saw committee chairs animated while making their own reports but lethargic and passive during other reports. Commitment and energy were funneled into long-standing emotional and financial turfs. The structure of the meeting discouraged shared visioning.

Careful consideration in planning the agenda for a meeting is every bit as important as planning for worship. Like the communion table, the board table should be viewed as "holy ground." If a meeting is to be worshipful work, with great potential for energy and excitement, much care needs to be given to its planning. A casual editing of last month's agenda makes for more stale bread.

Here are some suggested approaches:

- **Replace Committee Reports** Replace the litany of committee reports with spiritually rooted practices: use story-telling or history-giving. Allow a portion of the meeting to surface these in general or in relation to a specific occasion or issue.
- **Biblical and theological reflection.** The master stories from scripture, when woven with our stories and reflected upon theologically, will produce a center, a basic purpose, and a focused mission for the church.
- **Prayerful discernment.** Decisions are to be "discerned" with a spiritual eye rather than through a rational or deductive process.
- **Visioning the future.** Take the long, unhurried look. Anticipate the fulfillment of trends as well as the intervention of God through the unexpected.

These four practices create the potential for an integration of spirituality and administration. They do not need to follow the same order in each meeting. Nor do they require an equal proportion of time. Sometimes one practice is more appropriate to extended gatherings or retreats. A committee may feel threatened as these practices are instituted. But that need not be the case if they can see that an agenda can easily be grouped into stories, reflections, decisions, and future planning. This framework can actually save an enormous amount of meeting time. The board is able to focus on what is most pressing, pertinent, and important.

**Create an Annual Agenda.** If a board or council can make only a few good decisions in a year, ask, "What is the most important decision that we have to make this year?" Pick the two to four major decisions and develop a process for consideration that ensures good communication, lead time, and prayer. The rhythm of the church and program year lends itself to a planning cycle in which committees may need to report only once or twice a year, certainly not at every meeting. Their reports can include basic policy recommendations or future plans.

**Prepare a Consent Agenda.** Prepare a consent agenda in which all recommendations are in writing and listed together on a single page (or more). This should be in the hands of board members several days before the meeting. At the meeting separate out any items for which people request discussion or debate. Remaining items can be approved with common consent. Some churches are more comfortable with an informal agenda that may not be in print. In this case, the presider can use a chalkboard; at the beginning of a meeting, ask members to identify stories, recommendations, or future explorations. List on the chalkboard any action items. Rank them in order of importance for consideration. This ensures that the board will give its best energies to the most significant decisions.

**Create an Agenda Tracing Worship Themes.** Create an agenda that traces the themes of the Sunday morning worship service. This method ensures that elements of worship including prayers, hymns, affirmations of faith, centering in God's Word, offering, commitment, and blessing are present.

**Incorporate Prayers.** Incorporate provisions for a variety of prayers that thread their way throughout the gathering.

**Reflect on the Meeting.** Make provision for one of the participants to offer concluding reflections on the meeting. Reflections are not a recap of the meeting like oral minutes but a commentary on the process and significance of what has happened. *What really happened here, and what is the significance of it for our life together and for the church?* The reflections may be pastoral. Often people stick their necks out in a meeting and risk more than they had planned to. They may feel uneasy and apologize, "Maybe I shouldn't have said that." The meeting's reflections might bless and affirm such a person's participation by identifying how helpful it was to the process. Naming the tensions, conflicts, or frustrations while affirming the board's resolve to hang together and be there for each other (as well as trusting God's sustaining grace) continues the pastoral role. This reflecting role, which can be rotated through the group, raises awareness of the dynamics of board process and reduces the need for subgroups to conduct their own postmortem in the parking lot afterwards!

**Work with a Design Team.** Invite a design team of several board members to work with the pastor in framing the agenda. Board members can rotate through the team. This move would further empower the laity and ensure ongoing feedback on whether they are ingesting stones or savouring bread!

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1. Those of us on Vestries should explicitly seek God's guidance in our work. While a Vestry has legal and fiscal responsibilities (and must take them seriously), a Vestry is not a board of directors for a business or a not-for-profit. The work of the Vestry can be done only as it is grounded in the Spirit. Too often we are not intentional and reflective about our work. How then do we remind ourselves that the work of the Vestry is God's work? We might light a candle to remind us of the presence of Christ. We might end the meetings with Compline. We might share spiritual reflections as a regular part of the agenda. We do begin and end the meetings with prayer.
2. The Vestry must seek means to form community. A Vestry is a group of individuals, called to work in the church together. Most likely, Vestry members will come from different services with different backgrounds and have various agendas. Finding common ground, centered on the spiritual life of individuals and of the Vestry as a group, then, is fundamental to successful work as a Vestry.
3. A Vestry should act in concert with the rector. The rector is a member of the Vestry. The rector chairs the Vestry. The rector has canonical authority (e.g. use of space) for certain matters in the church. The rector is not a CEO hired by a board of directors to direct a staff carrying out the mandates of the board. Rather the rector is a partner with the Vestry in the mutual discernment of mission. In concert with the bishop, the Vestry determines the means for calling the rector and negotiating a memorandum of agreement. But after that, it's a partnership.
4. The Vestry is not a representative body. Thinking of Vestry membership as one from Christian education, one from the choir, one from the Scouts, etc., where we vote our interests, will only get us into trouble. The Vestry is a group of individuals seeking to discern, with the rector, what the parish is called to do and to have oversight of that work.
5. A Vestry must define its own mission, vision, values, and goals. There are many organizing principles for outlining the work of the vestry. Personally I like the SWEEPS model (stewardship, worship, education, evangelism, pastoral care, and service), partly because the acronym is memorable. But what is more important is that the Vestry moves away from automatic pilot to define its own direction. Vestries are well served by being intentional about their agenda and work.

6. Vestries must set strict time limits on buildings and grounds discussions. Vestries, in my experience, often move their attention to the concrete. It is a lot easier to spend a year's worth of meetings hashing out the problems with the old carpet (which people may trip on as they enter meetings) than it is to decide to FIX the carpet and move on to what the parish is called to do. Set strict time limits on buildings and grounds discussions, form a committee - and get on with attending to the rest of the life of the church.
7. Hold yourself, and one another, accountable. Have Vestry members committed to the tithe as the standard for giving? Does anyone talk about pledging in concrete terms? The last Vestry on which I served would probably have exceeded the giving of the entire parish if the Vestry members had approached a "modern" tithe of 5%, let alone the biblical tithe. My own parish reinforces that a person's pledge is known only to the bookkeeper, not to the rector or anyone else. That sure keeps stewardship in the closet.
8. Vestries should celebrate. Annual picnics, receptions, outings, dinners, and other celebratory events should be part of Vestry life.
9. Have formal rituals. We're a liturgical church. We like this stuff. It's meaningful to us. Begin (and maybe end) service on the Vestry with a formal ritual in a worship service. It's what we do well. And it matters.
10. Seek continuity and embrace change. In many parishes, the "old guard" controls the Vestry. In others, there is so much turnover that the continuity that allows for living out a mission is lost, with the parish reinventing itself every year. It is a delicate balance - to provide continuity and to bring in 'new blood" and new ideas. But it's a balance we need to constantly work on. And being about balance ... it's even Anglican!

*A three-time senior warden at St. Paul's in Indianapolis, Scott Evenbeck is the Dean of University College at Indiana University Purdue University Indianapolis and was the first lay President of the Consortium of Endowed Episcopal Parishes. A longstanding deputy to General Convention, he chaired the House of Deputies' Committee on Education in 2000 and 2003.*