

# **Diocese of New York Strategic Plan Advisory Committee**

## **Task Force B on Congregations**

### **DRAFT Report to the Bishop & Strategic Plan Advisory Committee**

**April 17, 2016**

#### **Overall Advisory Committee Charge**

Identify opportunities, strategies and vision that position the Diocese of New York to engage God's mission in ways that are sustainable, innovative and accessible

#### **Task Force B Objectives:**

Develop a common understanding of the marks of a healthy congregation and determine new ways of helping congregations address their futures

#### **Introduction**

Be not afraid. Be of good cheer! We are in a place of wonderful opportunity! We are being invited into conversation to build a transformative ministry together. There are many options and avenues open to us, the work of the Holy Spirit is dynamic, and will forth call creativity we did not know we had. We are committed to learning and using honest, appreciative and truthful dialogue as we move into our new future together. We are full of hope!

The strategic plan is not about the Diocese closing churches, but a clear eyed assessment of our times and God's call today.

We have lived through a century of constant change. Most of our churches were built in a time of great expansion and spiritual ferment in the late 1800's. However, there were no cars, people walked to church and wood stove heating put limits on church size. Our context has changed enormously. As Phyllis Tickle observed we are in a time of great emergence, people are seeking a deeper spiritual life amidst the ephemera and contextualized responses are necessary. We have a deep tradition of Jesus' love amongst us expressed in scripture, tradition and reason. We are wonderfully equipped to meet this day and this time.

Task Force B on Congregations has researched, studied, discussed and prayed upon the Bishop's charge to our group. We expanded slightly the objectives for our work and set about to answer the following questions:

1. What constitutes a healthy, vital and viable congregation?
2. What are realistic, concrete ways for congregations in the diocese can move forward to become truly vital and viable?
3. What resources and capacity-building support will be provided to assist congregations in their growth?

We hope and believe that this report will establish a common understanding and language, across the Diocese, of what constitutes a viable and vital congregation, and provide congregations proven approaches and strategies to plan their itineraries for growth. The report focuses on both the "what" and the "how" required to build and sustain healthy parishes. We suggest *what* the key characteristics of healthy congregations are, and *how* parishes ready for a new cycle of growth can create a plan for moving forward.

This report provides information, tools and resources to help every congregation in the Diocese of New York in 4 sections

## Sections 1 and 2

Assess vitality and understand the characteristics and effective practices of viable and vital congregations

## Section 3

Enter joyful, respectful and collaborative conversations around building local and Diocesan strategic growth plans

- Identify and access tools, resources, funding sources and supports provided by the Diocese and other parishes
- Build a Diocesan-wide movement of the Spirit where we are seeking to move forward together

## Section 4

Strategies for Imperiled Congregation

Our task force recognizes that this invitation to congregations to conduct honest, open assessments of their viability and vitality and to begin to chart a way forward, is offered at a moment when many Episcopal parishes are facing great challenges. We believe all of us are called into imagining and planning for new ways of “being church”, a task filled with promise and challenge. We pray that the strategies and examples provided here will empower people to meet the new day and we have great hope and excitement in discovering what God is calling us to do.

*Our report borrows extensively from other Episcopal Dioceses that are doing strong work in congregational development. We thank our brothers and sisters in these dioceses for their research, insights, information, tools and support. A list of our sources is in Appendix A.*

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**Section 1: Vitality** vī'talədē/ noun 1. the state of being strong and active; energy.

**Characteristics and practices of healthy/vital congregations.**

**Welcome:** "...Show hospitality, love what is good, and be reasonable, ethical, godly and self-controlled." Titus 1: 18

- The congregation seeks new disciples and has a culture of engagement and invitation.
- The congregation reflects the demographics (age, income, race/ethnicity) of its surrounding community and is culturally literate in its invitation and welcome.
- The congregation seeks new disciples and has a culture of engagement and invitation.

- The congregation has adequate outdoor lighting and signage; signage (indoors and outdoors) and bulletin boards are neat, clear, accurate, engaging and readable; and phone messages are welcoming, timely and contain hours of worship and location of the church building.

**Communications:** *"How beautiful are the feet of those who bring good news!" Romans 10:15*

- Members of the congregation know and can share the good news of God in Christ and how it is being lived out in their congregation.
- The congregation uses electronic and print communications vehicles including newsletters, Website and electronic newsletters which are engaging, accurate and timely and include contact information for the church office and clergy and lay leaders, as well as directions, service times and mission statement.
- The congregation has a media relations program that builds good relations with local media, including press releases, op/ed commentary articles, letters to the editor and appearances on local cable and, where present, radio stations.
- The congregation conducts creative outreach activities such as direct mail, special events and collaborations with advocacy groups, non-profits and community groups.

**Mission Discernment and Accountability** *"Lead a life worthy of the calling to which you have been called, with all humility and gentleness, with patience, bearing with one another in love, making every effort to maintain the unity of the Spirit in the bond of peace". (Ephesians 4:1-3)*

- The congregation has a mission and/or vision statement which is clear, concise, broadly known and periodically reviewed by the vestry and congregation, and the ministry and mission of the congregation reflect this vision.
- The congregation has achievable and measurable goals, strategies and objectives which members know and support.
- The congregation engage in ongoing mission discernment to seek God's activity and blessing in the world, bringing together those within and without the congregation to make God's love and justice real.
- The vestry and clergy engage in annual mutual ministry reviews that practice ongoing self-reflection, building the capacity for honest conversation, speaking the truth in love, caring for one another, and building each other up into Christ likeness and encouraging the achievement of goals in the context of the congregation's participation in God's mission.

**Education/Formation for Discipleship:** *To equip God's people for works of service, so that the body of Christ may be built up <sup>13</sup> until we all reach unity in the faith and in the knowledge of the Son of God and become mature, attaining to the whole measure of the fullness of Christ. Ephesians 4:12-13*

- The congregation focuses on developing the spiritual life of all its members as a primary task.
- Biblical literacy is a foundational goal and the Bible is embedded in all formation.
- Education and formation opportunities for discipleship are offered to children, youth, young adults, adults and elders. (We understand discipleship as living our lives following the example of Jesus' life and teaching, in fulfillment of our baptismal covenant.)
- There is clear designation of clergy and lay leaders responsible for planning and implementing education and formation programs.
- The curriculum or educational programs or resources offer a global perspective and celebrate ethnic diversity and gender equality.
- Congregational life is marked by encouragement, candor and kindness moving people more deeply into the life of Christ. Forgiveness, the making of amends, and reconciliation as spiritual practice is evident and encouraged.

**Fellowship:** *They devoted themselves to the apostles' teaching and to fellowship, to the breaking of bread and to prayer. Acts:2:24*

- The congregation has opportunities outside of coffee hour for fellowship (e.g. dinner groups, meals at the parish homes, discussion groups, Bible study, prayer groups).

- The congregation uses fellowship opportunities to deepen the discipleship of its members.
- The congregation gathers to celebrate, support and care for each other in the midst of parish life.
- Fellowship includes spiritual mentoring and the congregation practices holy friendship.

**Worship** *"Love the Lord your God with all your heart and with all your soul and with all your strength and with all your mind"; and, 'Love your neighbor as yourself.'" Luke 10:27*

- Worship is both vibrant and fresh in expression and rooted in the proclamation of the Gospel and the Christian tradition with the result that people are energized and inspired for discipleship in daily life.
- The planning and leadership of worship invites participation and engages the creativity of the entire congregation: all age groups, newcomers and established members. Worship expresses the cultural diversity of the congregation and its neighboring communities.
- Is made accessible to visitors with clear directions, bulletins and page announcements.
- The congregation considers alternative worship times, venues and liturgies.
- A holistic understanding of stewardship is expressed through liturgy and worship, including environmental, spiritual and financial stewardship.

**Gifted for Ministry:** *To each is given a manifestation of the Spirit for common good 1 Cor. 12:*

- The congregation intentionally and systematically helps its members discern their gifts for ministry in the church, in their families, workplaces, communities and beyond.
- The congregation helps its members to understand where they are called to exercise their gifts and encourages them to train for and pursue that call.
- The congregation's current mission initiatives stretch its members by calling them to work alongside and on behalf of people who are different from them in language, culture, ethnicity or economic status.
- Lay and clergy leaders are actively encouraged to enhance their own skills for ministry through participation in diocesan, provincial and national learning and training opportunities.

**Stewardship:** *But we have this treasure in clay jars, so that it may be made clear that this extraordinary power belongs to God and does not come from us. 2 Corinthians 4:7*

- Members of the congregation understand stewardship as their response to God's love and God's call to tend and care for the whole of creation, including ourselves, our possessions and "this fragile earth, our island home" building sustainable practices in all resources use.
- The congregation seeks to identify and participate in the flow of God's infinite variety of resources through the church to the world and the world to the church practicing the provision of the Reign of God.
- Members of the congregation practice simplicity of life and generosity in giving as spiritual disciplines rooted in gratitude to God.
- Members of the congregation throughout the year are asked to support the ministry of the church with their time, talents and treasure, especially through the practices of proportionate giving (or tithing) and witnessing to God's work in their lives.

**Outreach:** *"They also will answer, 'Lord, when did we see you hungry or thirsty or a stranger or needing clothes or sick or in prison, and did not help you?' 'He will reply, 'Truly I tell you, whatever you did not do for one of the least of these, you did not do for me.'" Matthew 24:44-45*

- At least 10 percent of the parish budget, excluding the diocesan assessment, is spent on outreach.
- The congregation has at least one signature effort of service, witness or advocacy that includes a broad cross-section of congregational members and has the support of the entire congregation.
- The congregation looks for opportunities to engage in collaborative ministry with other churches and faiths in advocacy and action.

**Congregational Leadership:** *What then is Apollos? What is Paul? Servants through whom you came to believe, as the Lord assigned to each. 6 I planted, Apollos watered, but God gave the growth. 7 So neither the one who plants nor the one who waters is anything, but only God who gives the growth. 1 Corinthians 3:5-7*

- The leadership reflects the gifts and talents (including demographic and cultural considerations) of the congregation.
- The leaders embody the theology of servant ministry. They are scripturally literate, delegate responsibilities and duties, encourage and empower others and communicate openly.
- The congregation's budget and financial information are available and transparent to the congregation, and members have an opportunity to engage in the budget process.
- The parish provides ongoing training, development and mentoring for leaders, with a focus on building the congregation's capacity to execute their strategic plan

**Community Connections:** *All of them were filled with the Holy Spirit and began to speak in other languages, as the Spirit gave them ability. "And how is it that we hear, each of us, in our own native language? Parthians, Medes, Elamites, and residents of Mesopotamia, Judea and Cappadocia, Pontus and Asia, Phrygia and Pamphylia, Egypt and the parts of Libya belonging to Cyrene, and visitors from Rome, both Jews and proselytes, Cretans and Arabs—in our own languages we hear them speaking about God's deeds of power." (Acts 2:4-5, 8-11)*

- The congregation has a visible presence in the community, and clergy and lay leaders are engaged in community activities and leadership.
- People in the community who are not members of the congregation know about the congregation and are regularly informed of the congregation's activities and offerings.
- People in the community come to the church for a variety of reasons in addition to worship, e.g. lectures, afterschool programs, day care, community discussions, etc.
- The congregation has engaged a community issue during the past year.
- Provides a steady presence with open doors, caring for and connecting to, the surrounding communities.

**Section 2:** vi·a·ble 'vīəb(ə)l/ *adjective* capable of working successfully; feasible.

## Characteristics of Viable Congregations

Viability characteristics are those elements of congregational and diocesan life that are considered basic and essential. They represent the fundamental obligations and responsibilities that each congregation undertakes as a constituent part of this diocese. While these responsibilities rest largely with the vestry, clergy should work cooperatively with the vestry and congregation to maintain the viability of the parish in these areas.

- Essential leadership positions (wardens, vestry, treasurer, clerk) are filled and have regular turnover per parish bylaws.
- Clergy and staff salaries and pensions are paid in a timely manner and meet at least minimum diocesan recommended compensation levels.
- The congregation is current with its financial obligations, including payment of the full assessment or have appealed the assessment to the Diocesan Adjustment Board or the Trustees'. (Parishes may appeal the decision of the Adjustment Board to the Trustees).
- There is an annual giving (stewardship pledge) program.
- A parish financial budget is prepared annually.
- Church properties (buildings and grounds) are free of major defects or these are being addressed.
- The congregation files an annual parochial report and a yearly audit and/or a modified audit report. (Brenda).
- There are parish bylaws that are reviewed at least every three (3) years.

- All clergy and appropriate lay persons have received Safe Church training.
- The congregation pursues “stewardship” in a holistic way to include its financial and environmental dimensions, i.e., the stewardship of God’s creation.
- The vestry pursues environmental stewardship in relation to church buildings with regard to both energy efficiency and the transition to renewable energy.

**Section 3:** strat·e·gy 'strədəjē/ *Noun* 1. a plan of action or policy designed to achieve a major or overall aim.

The following strategies are grounded in the levers for change identified in the Human Synergistics Report undertaken by the Diocese. The primary levers for change are:

Training and Development	Total Influence
Task Facilitation	Fairness of Appraisals
Lay/Congregational Involvement	Interdependence
Congregational Service Focus	

We have grouped the strategies by the five best practices for church sustainability and growth identified in the RenewalWorks church assessment process. The five best practices form the foundation for strategic actions for congregations going forward. The RenewalWorks process, already underway in the Diocese, will be used to help us build a common language of development across churches, regions and ministries.

The graph below is tool to help think through the current status of your congregation.

### Sustainable & Strategic Ministry Policy



All churches encounter some form of static or unsustainable common life or find themselves ready for a new cycle of growth in our lives together. Take a moment to think about where your congregation might be in relation to the above graph. Take a breath and listen with us to where the Spirit is leading.

# Best Practice Strategies for Viability and Vitality

## Getting People Moving

1. Congregations of the Diocese undertake a period of self-reflection using the above chart to assist in determining their viability, sustainability and strategic potential to effect Christ's mission in the world as members of the Diocese of New York.
2. The Indaba process of hospitality, fellowship and strengthening continue in the Diocese of New York on a Triennial schedule as a festival experience to build our capacity to enjoy and share our common life together, build respect and understanding of one another and strengthen our appreciation for the Holy Spirit's work throughout the Diocese in each congregation.
3. Congregations to engage with the Canon for Congregational Vitality and Development using the RenewalWorks process or some other mission reflection tool resulting in a local strategic plan of congregational and mission development to build strategic and viable futures.
4. Using RenewalWorks or a similar mission reflection tool congregations identify training needs and engage in training and development workshops offered several times a year through the Canon for Congregational Vitality and Development office, Episcopal Charities and other capacity building trainings offered by the Diocese and in the community.
5. Revitalize inter-parish councils and regional bodies. Sharing encouragement, imagination and support and reduce and/or eliminate the culture of competition.

## Embedding Scripture and Christian Formation in all activities.

6. Congregations consciously focus on the spiritual growth of members moving them from questioner/seekers to Christ centered disciples building capacity for congregational health, and sustainability.
7. Training for the apostolic ministry of taking the good news of Christ in word and deed out into the world, and ongoing evangelism and conversion of life for new disciples.
8. The Diocese engage in annual common scripture reflection to shape our mission and common life together. Chosen by our Bishops.
9. Congregations actively encourage and engage members in personal and small group scripture study using the wide variety of online, mobile and traditional methods of study.
10. Vestries to be trained in offering scripture study as part of Diocesan Vestry training.
11. Ethical life and practice is nurtured in ongoing training in Safe Church, Ant-Racism, and Environmental Sustainability as spiritual formation building trust and respecting the dignity of all human beings.
12. The Academia Ecumenica de Liderazgo, a leadership program for laity in Hispanic congregations and communities, to empower Latina/o members with Bible study, leadership, community organizing and discernment. (Launching 2016).

## Creating Ownership

13. A clear, concise listing of all Diocesan based grants and their purposes be made available to congregations to effect mission and ministry and is published through the Office of Finance on the Diocesan website.
14. Churches throughout the Diocese engage in a re-visioning of resources, people, assets, buildings using tools/processes such as those offered by The Church Building Fund, or Holy Currencies of the Kaleidoscope Foundation.
15. A data base of volunteer ministry resources available throughout the Diocese be assembled and maintained for access and referral to congregations by the Canon for Congregational Development office in partnership with the

Canon for Transition Ministries. All people of the Diocese being encouraged to give a minimum of five volunteer hours a year to another congregation or group to build up their ministry as a gift to the body of Christ.

16. Train lay and ordained leadership in Essential/Fierce Conversation to empower people to speak the truth in love and identify and take responsibility for change in congregational culture that empowers change for viable futures.

## **Pastoring the Community**

17. Community organizing skills and training be made available to congregational leadership in discerning and building new mission in dialogue and partnership with the surrounding communities.
18. The congregations of the Diocese continue to partner with Episcopal Charities in training, grant writing and developing best practices for mission.
19. Provide a steady presence with open doors, caring for and connecting to our communities, be the church.
20. Conscious identification and outreach to new emerging groups in parish locations, to open new missions, build welcome, and bridges of hospitality to Latino and other ethnic/language communities where neighborhoods are changing with the office of Hispanic Mission and the Canon for Congregational Vitality.
21. Build a Latino leadership group to foster collaboration, revitalize Latino churches; sharing retreats, outreach, training, etc..
22. Continue to build upon celebrations such as Absalom Jones that recognize the gifts of the many cultures and languages present in our diocese.
23. Churches work with Diocesan networks, commissions and staff in intentionally developing a strategy to reach out to colleges located in their vicinity ministering to young seekers and cynics alike.
24. Churches partner with companion Dioceses, Episcopal Relief and Development and other international entities in building global outreach and mission.

## **Building up leaders, nurturing the leaders heart.**

25. Clergy of churches engaging in mission discernment processes such as RenewalWorks are given coaching and support to set personal goals to effect changes necessary to move into sustainable, viable church culture, practice and partnerships.
26. Clergy are offered ongoing training through the Canon for Ministry office in effective congregational leadership, preaching and self-care, developing goals for personal growth and leadership capacity.
27. All congregations to develop a Sabbatical plan for their clergy.
28. A revitalized recruitment and investment in non-stipendiary Deacons.
29. Annual trainings be offered for Laity in church governance and administration given by qualified presenters for Wardens, Church Secretaries and Clerks of Vestry through the Canon for Ministry.
30. The Canon for Ministry office offers annual training for Licensed Lay Readers in the offering of Morning Prayer and are available for worship leadership in the absence of a priest.
31. A Diocesan music ministry development program be established in concert with the Commission on Liturgy to build the skills and fellowship of current practitioners and to train new congregational music leadership in partnership with local music schools.
32. The Commission on Ministry be empowered to study models for development and licensing of local ordination.
33. That recruitment and formation for ministry include the skills and capacity for apostolic ministry expressed in strategic growth, church planting, and the skills of evangelism.



## Section 4: When Congregations are at risk: *For to your faithful people Oh Lord, life is changed not ended.*

34. In consultation with the Bishops, Diocesan Staff and other members of the Diocesan leadership, churches that recognize themselves in a status that is both static and unsustainable will determine if:

45. The mission and ministry is best served moving into partnership with other congregations either as 1) an area ministry of churches in partnership sharing clergy and program, or 2) as a multi-campus church, (one church, one budget, multiple locations) or the exploration of other alternative structures or rebirth as a new community.

36. )Through diocesan conferences or other medium for churches in various stages of risk to gather and share their experience and seek ways forward.

37. )For churches identified as strategic to the larger ongoing mission of the Diocese strategies be developed to expand its viability.

Strategic presence:

- provides care to the community
- is a sustaining presence to the community
- is a valued partner in mission with the Diocese
- a faithful witness to the presence of Jesus Christ
- strategic congregations come in all sizes and exist in all kinds of neighborhoods

38. Ongoing financial support is determined by demonstration of increased vitality, viability and sustainability.

39. Through a period of reflection with local and Diocesan leadership if a congregation determines that the mission of that particular congregation is completed in that area at this time, the congregation's mission is to be celebrated, the building and assets allowed to transform into new mission (as in St. Mary's Scarborough or Trinity Mt. Vernon) and the people released into new ministry in the churches of the Diocese for care and nurture for new ways forward in faith. (For further reflection and potential action see the proposed Imperiled Congregations Canon.)

## Appendix A: Thank you and acknowledgements.

The Diocese of Massachusetts: For characteristics of Viability and Vitality.

The Diocese of Chicago: For strategies, process and model Canon for Imperiled Congregations and information on Fierce Conversations training.

The Anglican Diocese of Toronto for the Sustainable and Strategic graph.

Forward Movement and RenewalWorks: for the five best practices.