

VESTRY PAPERS



To Encourage and Guide Those Called by God to Lead Episcopal Congregations

Money, God and Vestries

by the Rev. Dr. James A. Kowalski

“The church is meant to be that place in history where God’s interests for the world meet the interests of the world in the presence of the Holy Spirit. The Holy Spirit seeks to transform a portion of the world into the church so that, as transformed world, the Church may live for the future of the world.” M. Douglas Meeks, *God the Economist*, (p. 23).

Money is a great invention. Aren't we better off not having to lug potatoes or chickens (dead or alive) to barter with when we go shopping? Across state and even national borders, we hardly experience any problems because of the confidence people have in money. We give money mythic power, thinking it makes the world go 'round. I personally fear, crave, rail against, and ignore it multiple times each day.

Jesus spoke about money more than any other topic — not counting His overarching message concerning God’s reign. And as a priest and citizen, I feel qualified to speak to how we label money — an essentially neutral medium — as the cause of the corruption of individuals and organizations.

So why do we so often hear the complaint, “This parish is always talking about money!” And vestries and clergy worry whether the church isn’t becoming “too institutional and no longer religious.” Would we be more countercultural if we owned no property and simply focused on spirituality and mission?

Reclaiming Stewardship

To struggle with the issues that surround money is a way to reclaim the meaning of being stewards. (How else can we remember that everything belongs to God?) And the danger is that we may fail to continue the dialogue on which Jesus spent so much time on — talking openly about money.

The truth is that “Movements” come and go unless they institutionalize. For Christ to be “bread for the life of the world,” we have to be more than a transient movement; we must institutionalize what we care about for it to survive.

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Stewardship is an essential part of a vestry's ministry. It is a journey filled with responsibility, for hard questions come with issues of time, talent and treasure—and especially the latter. This issue of Vestry Papers explores some of those questions in time for fall stewardship campaigns.

The Heart that Gives

by the Rev. L. Ann Hallisey, Cornerstone Director

It is with a real sense of serendipity that this issue of *Vestry Papers* offers the theme of stewardship and the opportunity for me to introduce myself as Cornerstone’s new director. I’ve been a priest in the Diocese of Northern California for seventeen years and, most recently, the rector of a pastoral size, multicultural parish for the past nine years.

Through those years and experiences of parish ministry, a conviction has grown in me that healthy, confident, well-formed

leadership in congregations — that of both lay and clergy — make all the difference in the vitality and mission of the church. Stewardship is an essential component of such leadership. With that in mind — and knowing that many fall parish stewardship campaigns will be gearing up soon — this issue of *Vestry Papers* offers both theological and practical tips to encourage giving from the heart.

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CORNERSTONE
IS A MINISTRY OF
THE EPISCOPAL CHURCH
FOUNDATION



The Heart that Gives

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The Rev. L. Ann Hallisey

When we talk about stewardship and vestry responsibility for it, parish leaders often want to run the other way. But I believe that the anxiety around stewardship arises from some misconceptions. Stewardship is not about raising money for the budget.

***“It is the heart that gives,
the fingers just let go.”***

Nigerian saying

Stewardship is about the right formation of hearts. It is an issue of spirituality, and it has as much to do with our souls as it has to do with budgets. Parish leaders can see their responsibilities about stewardship, not as production responsibilities but as formation opportunities. When hearts are open, then fingers do indeed let go.

Holding Ministry Loosely

I have a sign in my office that reads: “Caretaker Take Care.” It is a stewardship statement. It is a caution about self-care. It is a reminder that leadership is a habit of being as much as a responsibility of doing. It is a suggestion to hold ministry loosely so that the people around me can be about their ministry. It is a metaphor for who is really in charge — Jesus’ parables tell us who is the Owner of the vineyard, the Host of the banquet, the King who holds the steward accountable.

It is also a window into what I believe Cornerstone is all about. Cornerstone’s concern is for the most essential resource the church has — its leaders and the congregations for whom they care. The Rev. James Fenhagen, our founding director, described Cornerstone’s mission as being about the “health, wholeness and holiness” of congregations and church leaders at all levels. It is as viable a vision for me as the third director as it was for the first director. It too, is a stewardship statement.

I am tremendously excited about caring for the People of God in this new role. We are in the process of moving Cornerstone’s offices from Memphis to California and will soon be relocated at the Church Divinity School of the Pacific in Berkeley. The next issue of *Vestry Papers* will have our new address and phone/fax numbers. In the meantime, if you have thoughts to share or would like to reach me, my email address is: revannie@ix.netcom.com.

A Great Abundance

I am concerned about a lack of zip. Stop crying poverty, there is great abundance in the Episcopal Church! All churches hold about \$3 billion in assets and it is estimated that of the multi-trillion dollars of wealth to be transferred in the next 12 years, Episcopalians hold at least \$200 billion of it. Are you ready? Do you have a good story to tell? If you don’t, that money will go to museums, schools, concert halls, etc., and you’ll still be wondering how to make the pie smaller instead of bigger.

—William G. Andersen, Jr.

Former Warden, St. George’s Episcopal Church, Maplewood, New Jersey

Executive Director, Episcopal Church Foundation.

When we talk about stewardship and vestry responsibility for it, parish leaders often want to run the other way.

Enabling Generosity

by Fred Osborn

Members of a vestry are responsible for the church's resources. That usually means obtaining, managing, and directing the use of people, buildings, and investments of and for the church and its ministries.

The daunting task of *obtaining* resources is one which most vestry members abhor. Simply put, people hate asking for money. Yet someone must do it!

For years churches have shunned the more "secular" approaches to fundraising that prove so successful for colleges, museums, hospitals and other charities ("Here at St. John's, we don't do fundraising, we do stewardship!") as if "fundraising" were somehow tainted, dirty, or sinful. Yet the frequent abuse of the word stewardship has tainted it to mean, simply fundraising.

A bishop, for whom I worked some time ago, announced to a parish he was visiting, "Your stewardship is up!" Did he mean that the people of this parish were living more responsible lives, seeing the world, their skills and talents as gifts from God, acting out of a sense of abundance with generosity? No. He meant that the parish's pledge income was up. Is that what stewardship has come to mean?

A Sacred Spiritual Context

As vestry members, we must take our responsibilities to obtain resources seriously; we must do so in a sacred, spiritual context, but we must also understand how other, more secular charities raise money. There is much for us to learn from them.

At the Foundation's new *Academy for Episcopal Philanthropy*, we are teaching a new approach that melds the two — sacred and secular — approaches together.

In the "sacred" approach, we talk about life as a blessing, as a gift from God. When we see our lives as gifts of God, we can respond with gratitude. As we get more and more into that gratitude, we discover that the extent of those blessings is not only sufficient for our needs, but also overflowingly excessive! This recognition of abundance in our lives is, to me, the core "good news" of the Gospel. Once we see the abundance of the gifts we've been given, we can be free of the sense of scarcity with which the market economy bombards us day in and day out.

How splendid to be able to say "I have enough!" How magnificent to be able to say "I choose not to do this or that with my money" instead of saying, "I can't afford it."

Of course, seeing such abundance in our lives is not practical. It is not realistic. It is not prudent. It is magical, mysterious, and built on the sometimes shaky foundations of faith.

Just as our "sacred" approach has four elements:

gift; gratitude; abundance; generosity the "secular" approach, too, has four elements:

- ✚ DO something worthwhile and tell the story about it
- ✚ ENGAGE people who might be interested in that kind of work
- ✚ ASK them to give money
- ✚ THANK them over and over again

Colleges, museums and hospitals do an excellent job of "making the case," telling you what they're doing with the money you sent them, and telling what they might do if you send them more. Church people need to be less reticent to "show off" the good works they do. If no one knows about them, how can they help support them?

Say Thank You

It is also important to connect the people to the good work that their money has accomplished. Say thank you by telling people the story of what your church is able to do, because they gave it money.

Engaging people is a long-term process that brings them from awareness, through knowledge, caring, and commitment, to a sense of involvement sufficient to make them comfortable with investment. They know your church well enough that they'll entrust their money to you because they know you'll use it wisely and well.

Asking for money is usually done in two ways: in person, and in print. In person, solicitation usually means visits, sermons, seminars and telephone calls. Print methods, through articles in the parish newsletter about what good things the parish has done, are also effective.

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Time Stewardship at a New Level

by Steve Huffman

When you were elected by your peers to the vestry, you quickly became aware you had the power of the purse. You were no longer responsible only for your own stewardship of money. Suddenly you began spending time on such serious matters as budgets, staff salaries and capital expenditures. Perhaps at diocesan training you were told you had become a fiduciary. You were to put the interests of the parish ahead of your own interests. You were to keep yourself informed about the parish's financial condition and use prudence in expending its funds. You had risen to a new level in your ministry.

This article is not about money stewardship, important as that is. Instead, I want you to think about your duty to care for the collective time and talent of your congregation. The two key resources you have at your disposal are money (which can pay for paid staff time), and volunteer time (which is made productive through talent).

Wasting Volunteer Time

I have spent more than thirty years as an adult in parish life. My experience is that leaders, both clergy and lay, who would not dream of wasting money, with all good intention repeatedly waste volunteer time. The results are unsuccessful programs, half measures, and volunteer discouragement and burnout.

This happens when the vestry fails to set priorities and demand good administration. My business is advising private-sector companies in strategic and operational planning. I tell my clients they cannot afford to pursue every goal which comes to mind. Good planning comes from focus, and that requires pruning down goals and programs to a feasible number, one that your budget and your people's time can support.

SOME SPECIFIC IDEAS:

- ✚ Ask yourself if a proposed new program (or an existing one) supports your mission. Is it someone's pet project? Is it a tradition that no longer makes sense yet continues to gobble up volunteer time?
- ✚ At your vestry retreat be sure to take time to list program ideas. Then take the next step: pare down the list. I know it's harder to do that in a nonprofit organization, but you were elected to lead.
- ✚ How easy is it for your volunteers to communicate with the office? Does the secretary and rector or vicar have email and common word processing and spreadsheet programs to facilitate modern messaging?
- ✚ How up-to-date is your mailing list? Are you sending members out at canvass time to call on dead people and those who have moved out-of-town?
- ✚ Do you keep good records, or do your volunteers have to start all over when the secretary resigns?

Sound administration and respect for volunteer time are part of your job and the jobs of paid staff. They are central to spreading the Gospel. Respect volunteer time. You will get more done, and your volunteers will be happier.

Steve Huffman is a lifelong Episcopalian, strategic planning consultant for Huffman Strategy, and junior warden of All Saints Church in Sacramento, California.



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Thoughtful Stewardship – Beyond the Tithe

by Caleb Loring, III

“All things come of thee, O Lord, and of thine own have we given thee” is a familiar phrase to most of us, spoken as our church offerings are brought before the Lord. It’s such a simple, yet profound, phrase that lifts our eyes from our wallets to the horizon of life itself, to behold the full aspect of our present being – time, talent, treasure.

Two incidents in my life drove this phrase home to me. The first happened 20 years ago, when I was a younger married man with two children. My wife and I had raised our level of giving to six percent of our pre-tax income. Feeling pretty smug about this, I went to a Christian breakfast group in the area to hear a prominent local Christian businessman address us on the concept of giving. He noted that ALL we have comes from the Lord, and that we owe it ALL back to Him. He shared with us that he had moved beyond the concept of the 10 percent tithe to giving away over 40 percent of his pre-tax income, a level that had been audited more than once by the Internal Revenue Service.

As a footnote, he added that he felt he could give more. What a challenge this was to all of us there, and from a member of the local Episcopal Church as well!

The second incident happened three years ago. Because of the recent economic strength and growth in financial assets, which have accrued to the benefit of a number of people, the chairman of the board of Gordon-Conwell Theological Seminary (on whose board I serve) challenged the board to consider a one-time tithe on their assets (i.e., give away 10 percent of assets) to help the seminary with its capital campaign. This challenging thought has led me to be more generous in capital giving over the last three years.

How does one reach a point of deciding or being open to the concept of what “ALL things come of thee...” means in terms of our life? First, over time, we must truly embrace the meaning of Christ’s sacrifice for us – we were bought for a terrible, horrific price that truly demands our ALL in response. As we have come to know Jesus, to love him, and to truly want to serve him, the Holy Spirit teaches us how to give our ALL back in response. This process of knowing, loving, and giving is a life-long exercise and one of continuing challenges that leads to growth.

In addition to and through study and prayer, we learn in community, as is evidenced by the two incidents outlined above. This leads me to observe our need to have a healthy community at our church. A study was performed by Vision New England (a.k.a. The Evangelistic Association of New England) where I serve as chairman of the board. The results were captured in a book entitled *The Ten Characteristics of a Healthy Church* by the Rev. Stephen A. Macchia. These characteristics of a church community are as follows:

1. God’s Empowering Presence
2. God-Exalting Worship
3. Spiritual Disciplines
4. Learning and Growing in Community
5. A Commitment to Loving/Caring Relationships
6. Servant-Leadership Development
7. An Outward Focus
8. Wise Administration and Accountability
9. Networking with the Regional Church
10. Stewardship and Generosity

These characteristics are listed in the rank order resulting from surveys described in Reverend Macchia’s book. In sum, your church and your relationship with God, including spiritual disciplines, need to be in order (1-3) so that you can function as a healthy person and church community (4-6) and to go out into the world in a wise and accountable fashion (7-10) with generosity.

How are you and your church doing as pertains to these characteristics? These attributes certainly encompass the ALL of what comes from God and the giving of ALL back to Him.

Caleb Loring, III, is a member of St. John’s Episcopal Church in Beverly Farms, Massachusetts, a trustee of Gordon-Conwell Theological Seminary and is Principal of Essex Street Associates in Boston. He is also a board member of the Episcopal Church Foundation. This article was printed in the Planned Giving newsletter of the Diocese of Pennsylvania and is also excerpted from the book, The Ten Characteristics of a Healthy Church.



*All we have comes
from the Lord, and
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Money, God and Vestries

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How we do our business can be a significant way to broadcast our integrity regarding faith and the practice of carrying out business in ordinary, commonplace transactions.

The church cannot afford the risk of not doing business well, not only because of possible abuses and malfeasance, but also because we must set an example of how business and values can be integrated in everyday life.

In worship, lifelong learning and outreach we can set countercultural examples that meet business-like standards: Are we maximizing our resources? Customer-friendly and astute in our marketing strategies? We have a wonderful product to offer — for the life of the world.

The Hard Choices

Of course there is the wonderful news that money is also portable. Once gathered, we can send it to a neighborhood, or around the world, as we reach out in the name of Christ. And we can transport it across generations and time to amortize costs, and build the kind of shared legacies that make us inheritors of the manifested love of God.

As vestries endeavor publicly to connect faith and the everyday business of the church, we must expect the questions, “Isn’t this parish becoming too materialistic? Spending too much on itself?”

I am tempted to think that I was ordained to focus on things other than the business of the church. Yet what credibility would I have, if I were not tested by the difficulties of connecting faith to the hard choices of everyday, business decisions?

One of my greatest joys, in fact, and a praxis for my transformation as a priest, has been in working with other Christians who happen also to be some of the smartest, most creative entrepreneurs and business leaders I have known.

David Bollier, writing *Aiming Higher for the Business Enterprise Trust* in 1996, told the stories of 25 companies. Each prospered by integrating sound management and social vision. Bollier discovered that by “going beyond legal requirements and market place norms, these men and women are determined to bring their personal values and professional lives into closer alignment.”

Jesus tells us that He will be present in the bread and wine. Let us open our eyes and ears when He says, “Now, let’s see what I can do with the money!”

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Enabling Generosity

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And finally, thanking. So many churches could be better at making people feel that their contributions are important and appreciated. Remember, the best motivation for giving is a good experience of giving.

Feel comfortable with your own attitude toward the gifts God has given you. Understand the relationship you have with your own money. Knowing some of the concepts that we teach to meld the sacred and the secular should make you more comfortable with your vestry role as one who obtains resources for mission and ministry.

For more information about the Episcopal Church Foundation's Gift Planning programs, contact us at (800) 697-2858.

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