

Vestry Best Practices

The governance of a parish in the Episcopal Church is the purview of the rector, wardens, and vestry working in concert. As a body they act as the board of directors of the corporation. They need to comply with the canons of the Episcopal Church, the Episcopal Diocese of San Diego, and duly approved bylaws of the parish. Diocesan canons require parish bylaws and any amendments to be approved by the bishop with the consent of the Standing Committee. In order to assure good management of the temporal affairs of the parish, these guidelines are offered to both provide basic information about duties and best practices found in vital congregations with good governance.

Basic Duties

Vestry members have three broad duties in their trustee role: care, obedience and loyalty. The duty of care requires vestry members in their individual and corporate roles to take positive actions that promote the well-being of the parish corporation, its members and parish ministry. The duty of obedience mandates that vestry members in their individual and corporate actions be obedient to all federal, state and local laws, the Episcopal Church and diocesan constitution and canons, and the parish bylaws. The duty of loyalty underscores the expectation that vestry members, by their individual and corporate actions, will not disparage the parish or its leadership. Vestry members are expected to support the work of the parish by participating in corporate worship and by giving of their time, talent and treasure. Vestry members should be people of prayer and be especially diligent in their prayers for God's mission as it is being lived out in the parish community.

Additional Responsibilities

1. Mutual Ministry Review: each parish should conduct an annual Mutual Ministry Review (MMR) with the guidance of a diocesan-trained facilitator. The review provides an opportunity for leadership to evaluate congregational life and ministry and serves as a general wellness check for the congregation.
2. Hold an annual vestry retreat for the purpose of setting short-term and long-term goals.
3. The vestry is responsible for assuring that an annual audit is done.

4. The vestry should review the church's finances monthly. To do this, vestry members must be familiar with basic church business practices and the finances of the parish. The vestry must assure that all employment agreements are being faithfully executed. This includes:
 1. pension payments
 2. medical benefits
 3. payroll taxes and withholding
5. The vestry should review basic employment practices of the parish to assure compliance with all laws. Special care should be taken to audit Internal Revenue Service requirements as well as California Employment Law.
6. The vestry is responsible for the stewardship program of the parish, assuring that all members give to the mission of God in and through the parish.
7. The vestry is responsible for church property. This includes conducting appropriate ongoing maintenance.
8. Although at this time, vestry members are not required to take Safeguarding God's People, we strongly recommend that they attend this training. This class helps to assure that practices to avoid sexual abuse and misconduct are in place.
9. Vestry members are required to take the diocesan-sponsored anti-racism training, according to both diocesan policy and the General Convention of The Episcopal Church (see Resolution B094 in the year 2000).
10. All vestry meetings should be placed on the calendar so that members of the parish can attend, and observe the functioning of the vestry.
11. Executive or closed sessions should be for discussing confidential matters. This particularly should be done when discussing personnel matters and real estate transactions.
12. Vestry meeting minutes should be approved at the succeeding meeting. It is best to post these minutes in a public place. The minutes should be the definitive public presentation of the meeting.
13. Vestries may want to decide at the conclusion of the meeting if a brief statement, perhaps in bullet form, of the salient decisions of the meeting will be posted or

made available in some other reasonable way. These can be sent via email or placed in the Sunday bulletin.

14. Decide how the vestry is going to communicate and stick to the plan. The chief spokesperson for the parish and its leadership is the rector. It can often be counterproductive for vestry members to share their views of the actions of the vestry. This can create differing stories and interpretations.
15. When visitors come to vestry meetings, they may observe, but not participate in, discussion and decision-making. Often vestries will have a brief time at the end of meetings for comments from visitors.
16. Vestries are not only the legislative body of the parish, they also provide leadership for church ministries. A clear organizational structure for the vestry's work is advisable. It is often helpful for the structure to follow the goals outlined by the annual vestry retreat.
17. Unless your parish by-laws state something to the contrary, vestries should approve the annual budget; the annual parish meeting should not.
18. Vestry members are elected by the parish annual meeting. It is a good idea to look ahead and plan for the election of the next year's vestry by recruiting candidates. A practice in many parishes is for the retiring vestry members to form the nominating committee for the next year's vestry. This process helps recruit particular skills.
19. The role of rector can be a lonely job. Clergy who function well are integrated into the life of the diocese. Experience shows that isolated clergy tend to lead their parishes through treacherous terrain that could have been avoided had they been surrounded by the wise counsel of their peers and bishop. Vestries should make sure that their rectors, and other clergy, are engaged in diocesan life (clergy conference, clergy days, a colleague group). Similarly, vital congregations often have a notable number of lay persons involved in diocesan ministries.
20. In strong congregations, vestry members avail themselves of diocesan trainings. This includes those who serve as treasurers.
21. It is not appropriate or wise to serve alcohol before or during a vestry meeting. The General Convention of the Episcopal Church has spoken specifically about the abuses of alcohol. [View the full text here](#). View the diocesan policy on alcohol [here](#).

22. Vestries should have a Gift Acceptance Policy that communicates that the vestry evaluates and approves all restricted gifts for funds or projects that have not been previously approved. It is wise to have a vetting process that considers whether the gift is in keeping with the priorities and missional objectives of the congregation. Having such a policy in place before a restricted gift is offered can be helpful in the those instances when a gift is best declined and in some instances can provide the context for redirecting the gift to more useful purposes.

It is our intent that this be a living web page. Many of these recommendations and best practices come from the vestries of the diocese. You may have one to add from your experience. Please share it with others by sending your idea to the Rev. Canon **Allisyn Thomas**. Our assumption is that the wisdom is already in the church.