The Four Areas of Congregational Leadership

Organizing and Working

Reminder…

- Spiritual Discernment
- Planing and Leading
- Organizing and working
    - These three are in order of doing!
- Fiduciary and Legal

Organizing and working

You can't build a pyramid in a day!

What are the steps?

- Document everything
- Communicate the why
- Plan
  - Policies
  - Who
  - What
  - Where
  - When
  - How
  - For how long
- Execute
- Assess & Evaluate

Document Everything

- All formal decisions to take actions, including spending money, made by the vestry/BC must be documented in the minutes

- Minutes of meetings do not need to read like the social pages, but do need to be a paper trail for what *you* are going to do.

Document everything

- Keep meeting minutes in hard copy, not just electronic
- Keep financial records in hard copy, not just electronic
- The Business Manual for the Episcopal Church has policies for records management

Communicate the Why

- We need to be say why we are doing something, not just what we are doing.
- Too often we just to the what, don't start any work if there is not a compelling why
- Communicate this why in multiple ways

Plan - have the policy in place

- Make sure you have the policy in place that is needed for the work.

- Some typical policies needed include: safeguarding, building usage, financial management, weddings and funerals

- Policies need to spell out who can make decisions and what type of decision they can make

Reality check

- Do you know the why?
- What type of documentation do you have for the work you are taking?
- What policies and procedures do you currently have in place?
- What do you need to "upgrade"?

The work we do

And the reality of how we do it

*Document everything

*Communicate the why

*Plan

*Execute

*Assess & Evaluate

Plan

- Who
  - Who are the stakeholders, who are the naysayers?
- What
  - The actual activity planned after discernment
- Where
  - Best location, what space, is it shared, who are the neighbors?
- When
  - What time)s - clock and calendar
- How
  - Literally, how will this get done
- For how long
  - Be willing to set a time, or let something go

Execute

Do the ministry

Act

Engage

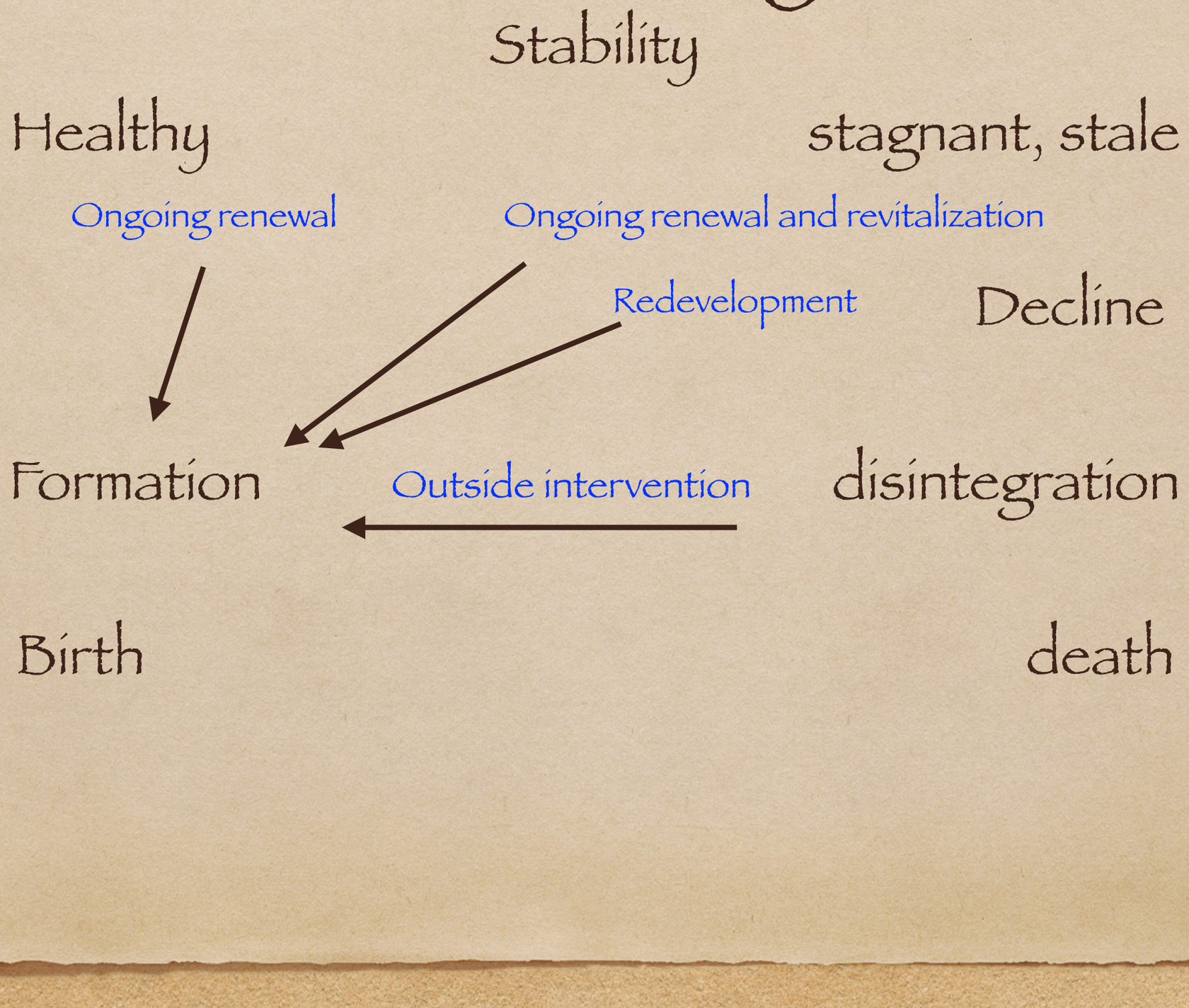
Assess and Evaluate

- Diagnostic
  - Best strategy and pre-knowledge
- Formative
  - Track progress and midcourse adjustments
- Benchmark
  - Measure vs goals
- Summative
  - review, improve, continue or end

Assessment and Discernment

- Remember that Organizing and Working is step 3, after Spiritual Discernment and the Planning/leading. The assessment process needs to loop back to the beginning.

The life-cycle



Principles of sustainability

*Assessing impact on constituency

*Weight impact on organization

*Identify decision makers

*identify sustainable elements

*Location

*cost

*Identify stakeholders

*sources of income

*barriers

*financial development

Reconnect to the WHY

- What we do should be consistent with who we are.
- Who are we -
  - followers of Jesus
  - Episcopalians
  - People who follow the way of love

Questions?