

# The Episcopal Diocese *of* Vermont



## **A Manual for Congregations in Discernment**

A Resource for Congregations Facing an Uncertain Future:  
procedures for renewing, combining, and closing  
congregations

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# An Invitation from Bishop Shannon MacVeain-Brown

Dear Friends in Christ:

“The Church as an institution is bound by tradition, and we have lived for generations thinking that part of our mission is to protect the Church from change. However, we must no longer deny that constant change is part of our tradition.” I said these words at our Diocesan Convention in November 2021.

As we consider how new models of ministry and new collaborative relationships might offer our Diocese new ways in our future, I call upon all of our congregations to also enter discernment I ask that you consider your current ways of life as God’s gathered people in your local communities and how—and whether—these ways of life will continue into our future.

This process of discernment of vitality and sustainability is a way for you to ask timely and critical questions about the future of our congregations. In certain circumstances, listed below (p.3), your congregation must use this manual to discern the path forward. In all cases, this discernment is the way to plan for future sustainability. It is a resource that will offer each congregation, and our Diocese of Vermont, the promise of a vibrant future of ministry together as the Body of Christ in the world.

It is important to note that your congregation is not alone on this journey: a Diocesan Congregational Discernment Team will assist you in the critical and challenging moments as you embark upon this work (see Appendix A for more information about these Teams). At last year’s Diocesan Convention, preaching on Matthew 14:22-34, I said that now is the time for us to “step out of the boat and go closer to Jesus.” As we embark on this work of building a sustainable future for our Diocese, let us answer Jesus’ call to step outside with hope and an openness to all things new. We will surely feel the water undulating under our feet and the wind blowing in our faces, and we will surely feel unsteady. My prayer is that when this happens, we will reach out and call to Jesus to steady us. His hand is always there, ready to hold us up.

Peace and blessings,

A handwritten signature in black ink that reads "Shannon MacVeain-Brown". The signature is written in a cursive, flowing style.

Bishop Shannon

# Preface

At the Diocesan Convention in November 2021, The Bishop of the Episcopal Diocese of Vermont invited all congregations to use this manual as a way to ask timely and critical questions about the future of our congregations. In certain circumstances, listed below, your congregation must use this manual to discern the path forward. In all cases, this discernment is way to plan for future sustainability. It is a resource that will offer each congregation, and the Diocese of Vermont, the promise of a vibrant future ministry together as the Body of Christ in the world. It is important to note that your congregation is not alone on this journey: a Diocesan Congregational Discernment Team can come together to assist you in those critical and challenging moments as you embark upon this work (see Appendix A for more information about these teams).

## Finding a New Way

This manual is for congregations that are: in discernment about their future; for congregations that wonder what God might be calling them to next, for those questioning their mission. This manual is for congregations that are concerned about their future, congregations that are afraid of failure, and congregations that are worried that they might have to close. The underlying message we want to share is: Be strong and courageous. God has led you this far, and God will never forsake you.

We want you to remember that as followers of Jesus Christ, the way of discipleship is the way of the Cross and the way of Resurrection. As followers of Jesus, we learn from our Scriptures that God calls people into new lands, new ways, new promises. Through the story of Christ, we know that death is nothing for us to fear. Remember that just as a seed has to die in order to bear much fruit, so death and change can lead to abundant life. This can be just as true for the life of a congregation as it is for individuals.

This manual is for congregations that are wondering about their options for the future. It is for congregations that are beginning to acknowledge that they are mortal. It is for congregations that are wondering if they are sustainable for mission and ministry, and are wondering what their next steps should be. This manual will not give you all the answers. The hope is that it will help you to begin asking the right questions.

Our purpose is not to close congregations. Rather, we want to help congregations engage in the process of renewal. Our purpose is to engage in the process of congregational development.

Congregational Development is the development of congregations of all sizes, locations and conditions into more faithful, healthy and effective communities of faith that are:

- Focused on and faithful to their unique reason for being--local expressions of the Body of Christ
- Connected to and expressive of their unique ecclesial tradition, ethos and character
- Self-renewing and responsive to the challenges and opportunities before them
- Sustainable or working toward greater sustainability in terms of a fit between the elements of their organizational life: vision for ministry, leadership, culture, size, property, finances etc.

We are completely committed to the process of congregational development. We also realize that there are congregations that are struggling with their identity, their mission and their sustainability. We want to help these congregations to think through their options. Through intentional and prayerful discernment, the congregation might decide that it has the necessary resources and energy for a deliberate renewal effort. Other congregations might decide that the best option is to join with another congregation in sharing clergy leadership or merging ministries or congregations. And it also is true that prayerful discernment can lead to the understanding that in some situations closure can be a faithful and life-giving decision. The purposes of this manual are to offer encouragement for congregations that are wondering about their sustainability and to ensure the assistance of companions (through the Congregational Discernment Committee), both clergy and lay from across the Diocese, as well as this practical guidance to congregations that are considering their options, including that of closure.

God's promise to Joshua as he faced an unknown future is still God's promise to us: "Be strong and courageous; do not be frightened or dismayed, for the Lord your God is with you wherever you go" (Joshua 1:9).

**Ever-present God, you call us on a journey to a place we do not know. We are not where we started. We have not reached our destination. We are not sure where we are or who we are. This is not a comfortable place. Be among us, we pray. Calm our fears and save us from discouragement and help us stay on course. Open our hearts to your guidance so that our journey to this unknown place continues as a journey of trust. Amen.**

The Rev. Canon Kristi Philip, from "Women's Uncommon Prayers"

## How to Use This Manual

In addition to the Bishop's invitation above, it is important to note that:

You must use this manual if one or more of the following is true for your congregation:

- You have not called a priest for 3 or more years
- You have not met as a congregation for more than 6 months
- You are no longer able to pay your bills and/or assessment to the Diocese

- Your budgeting reveals you have less than two years as a viable congregation.

Once your congregation has determined that it is time to use this manual and process to grapple with questions of sustainability, please begin by reaching out to Canon for Missional Vitality. This will help the Canon to prepare the Diocesan Congregational Discernment Committee to be ready to support you and your congregation as you embark on this process.

This manual can be used as a 3 to 6 part discussion guide. Taken chapter by chapter, a congregation and its leadership can use this manual to explore what comes next in their life and ministry together. The first 3 chapters invite reflection and inquiry. At the end of the third chapter, the next steps in discernment – toward revitalization, restructuring, or closure -- will emerge and this will dictate which chapter to go to next.

The appendixes at the end contain tools to help with the planning for next steps.

If you have already determined that you are in one of these states (revitalization, restructure, or closure), parts of this manual may be helpful to you in the planning. Go to **Naming the Reality and Planning Next Steps – on page 19.**

***Remember that you are not alone in your efforts: Your Canon for Missional Vitality and members of the Diocesan Congregational Discernment Committee are always available to help you at any point in this process of discernment.***

## Contact

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# Chapter 1: Called into a New Life

## Called Into Change

The story of Abraham is a story of call out of the settled and comfortable and into movement. God told Abram “Go from your country and your kindred and your father’s house to the land that I will show you.” (Gen. 12:1, NRSV)<sup>1</sup> And Abram set out, and in his faithfulness his name would change, he would experience tragedy and joy, life and death, his time would be one of movement and change, and God was always with him.

Israel had become a great nation while in Egyptian captivity; then God called Moses to lead them out of Egypt into the promised land of Canaan. Moses led the people through the wilderness for forty years. He led them to capture the land east of the Jordan. Then Moses died in sight of the Promised Land and Joshua was called to take over leadership. The people of Israel had to learn faithfulness in the midst of great change, and God was always with them.

The exiles in Babylon were uncertain about whether or not God was with them, but the prophet Ezekiel had a vision from God which showed the presence of God moving from the temple in Jerusalem, now destroyed, with the exiles into Babylon. The people would endure great hardship and suffering, they would learn what it meant to be faithful followers of God in a new and different land. They would come to understand that God was the Lord of all the earth and gain a new understanding of their role in salvation. The exiles experienced tremendous change, and God was always with them.

The disciples also were called to move from their normal lives into the new way of being, a way of journeying “on the way” with Jesus. We hear that they leave boats and nets, leave families, leave the tax booth, and leave much of the comfortable and familiar in order to answer God’s call. Life for the disciples would continue to be a journey in faith. It would always be an experience of change, and God would always be with them.

Change can be hard, but take heart, God is faithful and God is always with us!

If you are part of a congregation that is fearful and anxious about the future of your church, consider the many stories all throughout our Scriptures of change and faithfulness. Can you be honest about the realities of your congregation? If considering your church’s future causes you to mourn about its possible lost future, can you celebrate and mourn at the same time? Could God be proclaiming the end of one era, but also continuing God’s promise in a new way? The lessons in Scripture about change and call, the lessons about moving through difficult times are relevant for us today.

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<sup>1</sup> All scripture references are from the NRSV

## The temptations of the “good old days.”

“The good old days!” How we humans long for the “good old days,” even though we know that they will never return, and that maybe they weren’t really all that good anyway. In our churches, we also reminisce about how wonderful it used to be back in the “good old days.” For some that was in the 20th century, for others it may seem that those times were just before the COVID-19 pandemic. It is understandable that we would want to return to a time that we perceive as more secure. If only we could develop a new program, launch a better Christian formation class, or call a more enthusiastic (and younger) priest, then maybe everything would be better. Many of us would rather long for the “good old days” or “the way it used to be” than face difficult realities in the present.

Jesus said that no one who puts their hand to the plow and looks back is fit for the kingdom of God. God wants us to look forward, not back. God wants us to prepare for the future that we cannot see or yet imagine.

The dream of reliving the “good old days” by returning to a period of growth and glory is strong in many of our congregations. Again, this is understandable, for God has done wonderful things through our congregations. Faith has been nurtured and mission accomplished through the life of our congregations. And God may be telling us, just as God told the people before us: “Don’t look back at the way things were but look forward to see what I will do.”

## Be strong and courageous, for God is with you.

Consider the story of Joshua after the death of Moses. Joshua, who had served as Moses’ personal minister for years, was confused and caught in an extremely difficult situation. If Joshua was expecting consolation and sympathy from God, he was mistaken. God’s response to Joshua was: “Moses my servant is dead. Now proceed to cross the Jordan, you and all this people, into the land that I am about to give them, to the Israelites” (Joshua 1:2).

God’s brutal honesty with Joshua can be a lesson for us today. God’s people have always had great responsibilities. We do not have the same challenges or charge that God gave Joshua. However, we will face challenges and we do have a charge from God. Like the people of Israel, we get discouraged and fearful, thinking that we cannot succeed. When we face these responsibilities there is no greater encouragement than the assurance that God will help us accomplish them.

God instructed Joshua what to do and how to do it. God told him to observe the law as revealed to Moses, to study it diligently, and obey it. It is much easier to be brave when you have received proper guidance and instruction. We often speak of people who act out of the “courage of their convictions”. It is hard to act courageously when we’re not sure what the right thing to do is.

When we face the reality that our congregation may be in crisis, we may feel overwhelmed with guilt. When we face the possibility of ending and closure, we may begin to ask ourselves: What did we do wrong? Were we not faithful enough? Will a new building program or a new priest return us to the “good old days”? As we ask these questions, consider: Was God’s plan for the Israelites completed once Moses died? Or was God preparing for a new era, a different beginning?

God said to Joshua, “every place that the sole of your foot will tread upon I have given to you, as I promised Moses” (Joshua 1:3). God promised that God would be with Joshua, just as God had been with Moses. God would not leave or forsake him. As with Joshua, we too need encouragement and assurance that we can succeed in God’s work.

In struggling with the reality of your church, could it be that God has accomplished everything God intended through your congregation? Could God be telling you that your work is done, and that a new ministry is being formed? We are here because of the legacy of congregations that have come before us. Perhaps, God is telling us to pass that legacy forward in a new fashion, a new form, a new ministry. As God said to Joshua, “Don’t live in the past. Prepare for the future. Move on.”

Preparing for the future and moving on may mean letting go! Jesus told his disciples, “If anyone would come after me, he must deny himself and take up his cross and follow me” (Matthew 16:24). These words should remind us that preparing for the future may be difficult. The Church has faced tough times throughout its history. In the life of a church, no issue can be tougher than considering the end of an era. Will this experience cause pain, anxiety, confusion, and doubt? Yes. Will you become discouraged and fearful, thinking that you cannot succeed? Possibly. But as you travel through this process, remember to celebrate all that God has accomplished through your ministry. And remember that, as with Joshua, God will never forsake you.

God has given us all that we need to be successful in serving God. As the psalmist writes, “God is our refuge and strength, an ever-present help in trouble. Therefore, we will not fear” (Psalm 46:1-2).

God’s goal for Joshua was to lead the people into the land of Canaan. God promised Joshua he would not be alone, that God would be with him. Three times in three verses (Joshua 1:6-9) God tells Joshua to be strong and courageous – was Joshua filled with fear that God needed to say this to him three times? Perhaps, but with hope and the promise of God’s presence, Joshua was able to be strong and courageous.

What is God’s goal for you and your congregation? We can face the tough times of our unknown future knowing that God has offered us the Promised Land of eternal life—God assures us that we can successfully reach it. This alone gives us the Spirit to be strong and brave enough to face our future together. God is with us!

## Questions for Discussion

- Think about your congregation, share a time when you experienced the most joy with your fellow congregants.
- Tell a story about when you think your congregation was/is “most alive.”
- Tell a story of a time when your congregation faced a “great” challenge. Describe how you, as a faith community, met that challenge?
- Consider the story of Moses, Joshua and the Promised Land:
  - Who do you most identify in the story? Why?
  - Where do you see the story of your life as a congregation intersection with the larger narrative of the scripture? Are you still in Egypt? In the wilderness? About to cross the Jordan? Describe how it feels to be in the place you have identified – are you struggling, frustrated, overwhelmed? Wondering if you will perish before you attain the promise? Feel that you are wandering without purpose? Relieved at having reached the Promised Land?
- Think about the story of Abraham: What about it speaks to you today? What captures your imagination?
- As you ponder the story of the Israelites: Where do you feel your congregation is—in exile or returning to Jerusalem after a long captivity?
- As you think about the disciples: How does their call speak to you? If you were to pick a biblical story that seems to speak the best about your congregation today, what story would that be?

# Chapter 2: The Life Cycle of a Congregation

God's kingdom lasts forever, but individual congregations do not. Congregations come into being, live, and might eventually, die. This is normal. The stages in the congregational life cycle are birth, formation, stability (both healthy and stagnant), decline, disintegration, and death. (See picture below).

Times of crisis and transition can provide good opportunities for a congregation to return to the basic questions:

- What is God calling us to do, at this particular time and place?
- What is our purpose?
- Why are we here?

It is dangerous and tempting to avoid wrestling with these questions until it is almost too late. It is better to ask these questions when a congregation is in the healthy stability stage, or even in the stagnant stability stage of the life cycle. By the time a congregation is slipping from decline into disintegration, people may be too scared and fatigued to do the hard work of corporate discernment. By that time, financial and material resources may be waning or worn.

Therefore, being proactive about starting this conversation **before** a congregation is in decline is recommended and offers the most benefit. This is just good common sense. It is also better stewardship. The discernment process about a congregation's future (including any ensuing process of transformation or closure) takes a great deal of time and energy. Any option, such as engaging in renewal, creating a constellation, combining with another congregation, or closure, might also involve significant legal and constitutional work. All this takes time, people, and money. It is wise to plan ahead.

The congregational life cycle is analogous to an individual's life cycle. We all know that it is wise to acknowledge your own mortality and make plans while you're still reasonably healthy. It is much more difficult to make good end of life decisions and do effective estate planning when you are already enfeebled, exhausted, and have depleted your resources. We often choose to live in denial of the fact that we are mortal, which is problematic for individuals and congregations alike.

For some congregations, it may seem that we will have started the conversation about vitality too late. However, even if finances and leadership are stressed, a decision to close, and to honor and celebrate the ministry of past generations in a liturgy, is a positive way to create a good ending. It acknowledges the value of all that came before and invites the remaining parishioners to move forward with a sense of shared completion. A closure of a congregation that is a choice made by all, with a full acknowledgement in ceremony, is a much less painful process than when you simply allow circumstances to dictate when and how you close.

**Prayer is crucial.** Sustained prayer and conversation about the congregation’s mission can lead to new directions in ministry and a new sense of focus and purpose. Sometimes, such prayer and conversation help a congregation to identify assets and resources it didn’t realize it had, so that ministry in their place can continue for a time in new ways. Here, options such as the work of congregational development, shared leadership or constellation<sup>2</sup> with another congregation are worth careful consideration. Depending upon the situation, these options may be viable strategies for renewed mission, or they may just postpone inevitable decline.

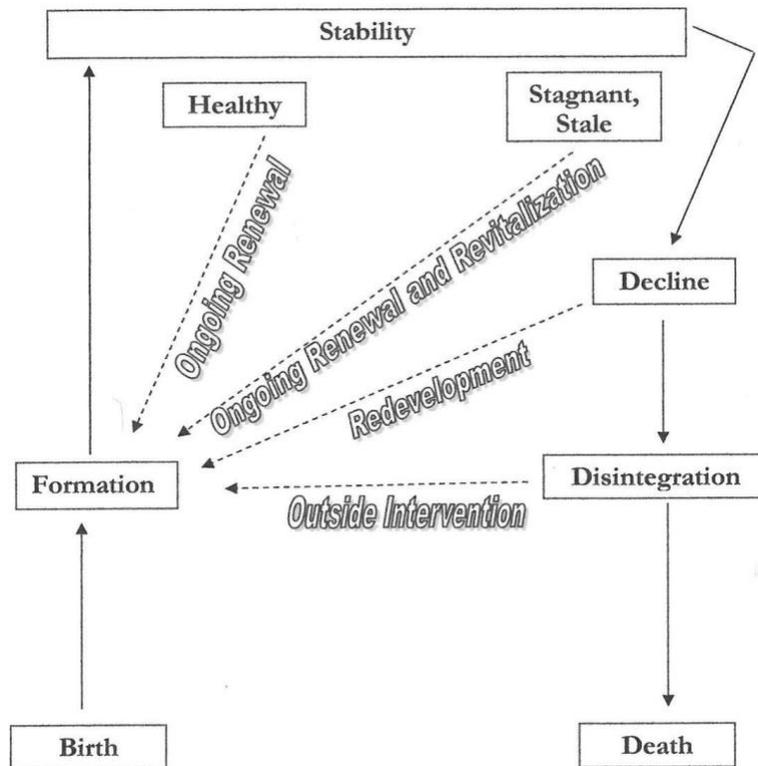
In other times sustained prayer and conversation about mission lead to the realization that God is calling a congregation to close. Grief is inevitable. However, closing also may be an opportunity—an opportunity to use the congregation’s resources to continue God’s mission in another way or in another place. Another possible opportunity or outcome of closing a congregation is resurrection life as an **Episcopal community**, a unique worshipping body or a missional community. These communities are grounded in faith, guided by love, and connected to an Episcopal diocese. They may meet in public spaces, secular places, private homes, a variety of non-church facilities, or online.

There are times when dying may be a more faithful response to God’s call than stubborn survival.

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<sup>2</sup> **Constellations** are formed when two or more congregations in geographic proximity enter into a formal agreement of collaboration. At the very least, clergy leadership will be shared. Ideally constellations will share other things such as resources, leadership, ministries, programing and administrative functioning. The models for constellations are numerous and will likely evolve as communities experience collaboration with each other. There will be more detail described in chapter 5.

## Definitions and Descriptions of the Various Stages of the Congregational Life Cycle



**Birth:** A founder or founders, an idea, a dream.

**Formation:** Identity. Who are we as a faith community? What are we here for? Who is our neighbor, and how are we related to our neighbor?

**Stability:** Fruitful and sustainable ministry, institutionally and spiritually. A time when the elements of organizational life fit together (money, vision for ministry, property, people), This can be a **place of health** or can tip into feeling **stagnant or stale**, with growth stalling and new opportunities being ignored. This stagnant or stale stage can sometimes be experienced as a membership plateau followed by declining numbers.

### Healthy Stability and Ongoing Renewal

Healthy stable congregations stay healthy either through leadership that instinctively raises and acts on formation-related questions in the overall congregation or through processes that continue to renew the entire congregation or important parts of the congregation that need attention. Some leaders organically recognize and act on areas in a congregation that need improvement; some leaders/congregations have in place processes that scan the life of the congregation, listen for and act on areas that need

improvement. These congregations engage the formation questions, seeking to understand their life in light of God's mission and kingdom.

### **Stale, Stagnant Stability and Renewal/Revitalization**

When stability becomes stale and stagnant, a congregation and its leadership will need to look at formation questions in a more focused way: Who are we (identity)? What are we here for (purpose)? Who is our neighbor (context)? These are typically system-wide work and actions that when done skillfully also introduce and teach the congregation language and models or frameworks that help to focus the discussion. Sometimes the self-study before the calling of a new priest-in-charge/vicar/rector can be the context within which at least some of this work is done.

**Decline:** Numbers fall off, energy declines, fear and blame in the system, confusion, focus on small things rather than central issues.

### **Decline and Redevelopment**

The further down the path a congregation goes in declining numbers, finances, energy and flexibility, the more costly it becomes for a congregation to engage the formation questions that have the potential to activate what it will take to return to stability. Redevelopment is a possibility when serious declines have occurred in a congregation, but significant effort will be needed to increase the likelihood that redevelopment efforts will bear fruit. Often third-party help or a dramatic change in leadership is needed to face the situation, to let go of old patterns of doing things and to face into what will be needed to turn things around.

**Disintegration:** Conflict, hopelessness, feeling stuck, internal leaders unable to affect change.

### **Disintegration and Outside Intervention**

When disintegration begins and things begin to fall apart, conflict or paralysis can set in. At this point a diocese will often intervene, taking charge of the decisions in that there is no internal capacity to do what may be needed.

**Death:** The end of life, the total and permanent cessation of all the vital functions of an organization.

## Questions for Discussion

Look at the definitions and descriptions of the various stages of the congregational life cycle above:

- Tell a story about the "birth" of your congregation? Identify places of stability in the past and current life of your congregation, what key elements were/are present? What did stability look and feel like?

- Where do you believe the congregation currently is on the life cycle? Share your reasons for placing your mark where you did.
- Describe past times of renewal/revitalization/redevelopment in your congregation. How did you experience those times?
- Discuss the challenges that hinder renewal/revitalization/redevelopment from happening in your place.
- What are the tensions in your congregation that take up energy and focus that could be spent on ministry with our community?

# Chapter 3: The Discernment Process: What Is God Calling Our Congregation to Do?

## Helping a Congregation Make Decisions about its Sustainability

Through this exercise we want to help a congregation engage in prayerful and intentional discernment centered on the question: **“What is God calling this congregation to do in this place and at this time?”** This is the core question of ministry.

### Vocation

*Why am I here? What is God's will for my life?*

We all want to know the answer to the questions of vocation.

The word "vocation" means "call." As Christians we believe that God calls each one of us by name, and calls us to a life of discipleship, which is how we live in today's world as follower of Jesus Christ. Discernment is the way we try to seek and discover God's call, God's will, for our life as individuals and as communities. It involves reflecting on the deep questions of baptism, prayer, self-exploration, and awareness of the circumstances of our life, our gifts and abilities. One aspect of this process is learning how to listen to God's voice and the voice of the Holy Spirit speaking through Scripture and through other voices. It relies on deep relationships with others to help discern what might truly be God's voice, not just our own desires.

*“Why are we here? What is God's will for our life together?”* are also important questions for a congregation to ask. Although the mission of a congregation is different from an individual's vocation, the process of discovering that mission has a lot in common. When your church writes a mission statement, or you invite someone to attend worship with you, in some way, you are responding to a similar question. What is God calling this congregation to do in this place and at this time?

Discerning God's purposes for the congregation is the foundation of what we are doing when we conduct a church planning or re-visioning effort. We find few congregations are intentional about nurturing the practice and language of discernment. Simply using the word “discernment” is not enough, especially if it is not the normal practice of your congregation. In fact, it could make the planning and visioning effort feel alien or intimidating. How do we seek to know God's will in concrete ways in a planning process?

One helpful way is to compare it frequently to the ways we try to understand God's will in our individual lives.

1. We consider the “givens,” the unique gifts that God has provided.

2. We look back to see how we have developed over time; we review our history.
3. We consider our strengths, what feels “natural” to us.
4. And we look at the ways we have grown and gained understanding through adversity.
5. The question “What kind of person am I?” becomes “What kind of congregation are we?”
6. Most of all, we remind ourselves to ask the right questions.

“What should *we do*?” **becomes** “What might *God have us do*?”

“How can we *benefit*?” **becomes** “How can we best *serve our neighbor*?”

“Where do we *want to be in five years*?” **becomes** “What does *God have in store for our future*?”

A discernment process requires the active, firsthand engagement of those who have a *real interest in*, and *commitment to*, the congregation's future.

Three sets of prayerful questions describe this process of discernment:

1. Lord, who are we? What are the strengths that you have gifted us with?
2. Lord, who are our neighbors? What are their needs and gifts?
3. Lord, after listening to your voice, how shall we respond?

St. Ignatius of Loyola has handed down to us some principles of discernment which are quite useful as we engage in this process.

*Christian spiritual discernment leaves the outcome of the discernment in God's hands.* This is the hardest principle to put into practice, yet it is crucial to good discernment. As you discern ask yourself if you can really be at peace with whatever comes from this time of sifting, sorting, praying, studying and choosing. Opening ourselves to new possibilities is spiritually freeing. Anyone who already has their mind made up and cannot be open to any possible outcome is not engaging in discernment. All need to pray for God's grace to practice openness.

*Good discernment takes all the facts and practical issues into consideration.* Spiritual discernment about God's will for our personal lives and the life of our congregation does not, and must not, ignore the realities of life and practical considerations.

*Good discernment does not go on forever, at some point we make a choice and take action.* Although good discernment takes time, it is not an excuse to procrastinate. If you are waiting for certainty, forget it. Seek clarity instead. And just because we discern well does not mean we never make mistakes. Having prayed, studied, sifted and sorted to the fullest, we need to take a leap of faith and act.

***You are not alone in your efforts: Your Canon for Missional Vitality and the Congregational Discernment Committee are always available to help you in this process of discernment.***

## Questions for discussion

**If your congregation has a mission statement, look at it. Discuss:**

1. Does our mission statement accurately reflect our current understanding of ourselves? Why or why not?
2. How is the congregation living out our current mission statement?
3. What barriers exist that hinder the fulfillment of the stated mission of our congregation?
4. Imagine and share how those barriers might be overcome.

**Look at the demographics for your community and congregation (if you do not know how to access this data ask your Canon for Missional Vitality – or a member of the Congregational Discernment Committee for help):**

1. In the past ten years what has happened to the demographics of your town and surrounding area?
  - a. Has the population grown, shrunk, stayed the same?
  - b. What is the ethnic and age demographic in your community and what changes have taken place?
  - c. Is your school district growing or shrinking?
2. In the past ten years what has happened in your congregation with respect to membership?
  - a. List your congregation's average Sunday attendance for the past 10 years.
  - b. List your congregation's financial giving average for the past 10 years?
  - c. What is the age demographic of the congregation?
  - d. What is the ethnic demographic of the congregation?
3. Given the trends of the above two questions, what predictions can you make or hunches do you have regarding the demographics of your community and your congregation in the future?

**Consider your town:**

1. What are the greatest needs/challenges currently in your town?
2. What have been the changes you have seen in your town in the past year? In the past 5 years? In the past 10 years?
3. If someone were to ask at the local gas station for directions to your congregation, would the clerk be familiar with/ know of(?) your congregation in order to give those directions?
4. What would your community miss the most if your congregation were no longer present?

### **Consider the resources available to you if you were to share ministry**

1. How close is the next Episcopal congregation?
2. Do you have a relationship, formal or informal, with any other congregation in the area/community?
3. Has the congregation ever been in a shared ministry setting in the past? What are the stories from that time?

### **Consider your physical plant resources:**

1. Take a tour of your physical plant. Describe in detail its condition.
2. Is there deferred maintenance?
  - a. If yes, list those items and estimated costs.
  - b. Can you afford to make the needed repairs / upgrades to the facility?
3. How old is the current furnace/air conditioner?
4. How old is the roof?
5. When was your last building audit?
6. Is there a loan on the building? If yes, how much remains on the loan?
7. Is the present facility physically adaptable for use? Is it accessible to those with physical limitations?
8. Does any other organization use your building during the week? If yes, list those organizations and how often they are in the building during the week.
9. How often are other people (in addition to those on your list of organizations) in the building during the week?

### **Consider your people resources:**

1. Do you believe you have sufficient numbers of people, who are active and committed to the work of the congregation, that you are able to meet your mission?
2. Do you offer regular Christian formation programs?
3. What are your current outreach ministries? Do you have sufficient funds and interested members to do the work of outreach? Explain.
4. Does the financial giving of current members meet the needs of the congregation, or do you need to rely on bequests, special gifts, investments and/or loans to pay expenses?
5. Does the current level of financial giving allow us to do anything new or is it merely enough to maintain what we are already doing? Explain.
6. What percentage of the active membership pledges?
7. What is your congregation's average pledge?
8. How many members tithe?
9. Describe your pledge drive.
10. Describe your stewardship formation.

***Remember you are not alone in your efforts: Your Canon for Missional Vitality and members of the Diocesan Congregational Discernment Committee are always available to help you at any phase in this process of discernment.***

## Naming the Reality and Planning the Next Steps

After you have prayerfully worked through the questions above, take some time to consider these further questions:

1. Do we have the resources of people and finances to realistically commit to the work of renewal/revitalization/redevelopment?

**If the answer to the above question is “yes,” see Chapter 4.**

2. Would we consider entering a relationship with another congregation such as shared leadership or a constellation?
  - a. Is there another Episcopal congregation in which we can be in relationship?
  - b. Is there an ecumenical partner congregation in which we can be in formal relationship? If so, who?
  - c. Have they expressed an interest in being in relationship with us?

**If the answer to the above question is “yes,” see Chapter 5.**

3. Has the time come for us to accept the reality that we are being invited to close the congregation?
  - a. Do we have a vibrant enough mission and ministry that we should/can consider becoming an Episcopal community?

**If the answer to the above question is “yes,” see Chapter 6.**

***At this time it is important to communicate with the Canon for Missional Vitality regarding your next steps and discuss a possible request for a Congregational Discernment Committee Team to assist you in the coming procedures and processes. See Appendix A for more details about Congregational Discernment Committee Teams.***

# Chapter 4: Deciding for and Steps in “Renewing/Revitalizing/Redeveloping” Your Congregation

After completing your communal work of discernment, your congregation feels God is calling you to commit to the work of renewal, revitalization, and/or redevelopment.

## Step 1:

Contact with your Canon for Missional Vitality, who will be your shepherd and guide for this process.

The exact process of renewal, revitalization, and/ or redevelopment will depend on many things, including where you have discerned that the congregation is on the lifecycle. It is usually easier, and requires less energy, to engage in the process of developing your congregation earlier in its life cycle than later in its life. Nonetheless do not be fooled: all work of renewal and development is hard work. Choosing this path is not the “easy way out.” This work will require a great deal of time and energy on the part of congregational leadership, and indeed the whole congregation. **If you have chosen this option, you must realistically have the people and finances to give it 3 to 5 years of focused and sustained effort.**

## Option 1:

Working with the Canon for Cultural Transformation, begin work to embark upon a renewal process including starting a new and innovative ministry responsive to community and focused on mission, such as one of TEC’s New Episcopal Communities (NECs). NECs Distinct and different from existing churches and institutions: NECs are not programs of existing churches or dioceses or restarts. NECs have entrepreneurial leadership, a pioneering and creative spirit and seek to bring into being a ministry that was not there before.

## Option 2:

Assemble a team, including your cleric (if you have one), to attend the College for Congregational Development. This is a two-year program that aims to equip congregational clergy and lay leaders with the knowledge, skills and practices needed to develop their congregations into healthier and more faithful communities of faith and organizations. Your commitment to send a team to the College also requires a financial outlay on the part of the congregation (and possibly its team members, depending upon how structure paying the registration fees). Note that the Bishop has approved the use of your investment pool funds for this purpose if necessary. To learn more about the College for Congregational Development, see <http://www.cdcollege.org/about-the-college/program/>.

### Option 3:

Restructure your own Clergy Leadership model (see also Chapter 5 for leadership models with more than one congregation):

First a note: We the church continue to struggle with being the church in an unchurched society. At the same time, we have smaller budgets. In our Diocese, the answer to this challenge has been to hire part-time priests; 3/4 of our congregations rely upon leadership that is half-time or less. While it may seem financially prudent in the short-term, time has proven that part-time clergy leadership is not the answer to being a thriving and vibrant church in today's unchurched society. Continuing to act as though part-time leadership will save us, is simply managing decline. For this reason, any discernment about revitalization through new models of leadership, must include conversations about sustainability and a sound stewardship plan to support the long-term vibrancy of the new leadership structure.

### A Model You Create

There are other possible leadership models that may serve to revitalize and energize your congregation for its work as the body of Christ in the world. Some examples include more than one priest sharing leadership in your congregation, a priest and an associate priest, or another combination that you discern to be most empowering of God's call to you in your ministry. In any discernment of a possible new model, the Diocesan staff and others across the Diocesan household are available to work with you (see Appendix A for more information on Teams).

Because the work of renewal, revitalization, and/or redevelopment will depend on the needs of the congregation, it is impossible to say what specific steps will take place next. Each congregation will develop a detailed plan in partnership with Diocesan staff and the Diocesan Congregational Discernment Committee.

*It is important to note that while the Canon for Missional Vitality is compensated by the Diocese to help congregations with this work, it is appropriate that congregations offer financial assistance to defray the expenses incurred by members of the Diocesan Congregational Discernment Committee—travel and other expenses related to their work with the congregation.*

# Chapter 5: Deciding for and Steps in Joining Another Congregation – Constellations, Plus!

**If you are reading this chapter, you have already discerned, through the work of chapter 3, that there is another congregation that is willing and interested in working with you or you are interested in finding a congregation with which to work. For the purpose of this chapter the word “cooperation” will be used at times to describe all the various options for congregations working together.**

For all the work described below, it is the expectation that congregations are working closely with designated member/s of the Diocesan staff and the Diocesan Congregational Discernment Committee.

*It is important to note that it is the responsibility of the Standing Committee to approve the acquisition, encumbrance or selling of property in the diocese. This means, if property changes become part of these discussions, a representative from the Standing Committee shall be part of the Congregational Discernment Committee Team assisting this process.*

The important terms of **Constellations** and **Merging** need to be defined. You will find these terms used differently depending on denomination and diocese, so for the purpose of the Diocese of Vermont, we understand these terms to be defined as follows:

**Constellations** are formed when two or more congregations in geographic proximity enter into a formal agreement of collaboration. At the very least, clergy leadership will be shared. Ideally constellations will share other things such as resources, leadership, ministries, programming and administrative functioning. The models for constellations are numerous and will likely evolve as communities experience collaboration with each other.

Two congregations, in geographic proximity, formally affiliate themselves in an MOU. They agree to share financial resources in order to support a clergyperson or persons.

This model can work for congregations with limited resources—energy, finances, members, systems—who share a sense of common mission and purpose although this may be expressed differently in each local community. Although affiliated, the congregations retain their own identity. The clergyperson may be seminary-trained or locally-formed, and congregation members are actively involved in mission and ministry. The clergyperson’s full-time compensation package is formed by both congregations’ resources.

A note on part-time or full time: We the church continue to struggle with being the church in an unchurched society. At the same time, we have smaller budgets. In our Diocese, the answer to this challenge has been to hire part-time priests: 3/4 of our congregations rely upon leadership that is half-time or less. While it may seem financially prudent in the short-term, time has proven that part-time clergy leadership is not the answer to being a thriving and vibrant church in today's unchurched society. Continuing to act as though part-time leadership will save us is simply managing decline.

In addition, the Diocese of Vermont has long been challenged to recruit clergy leadership for part-time positions. In the larger Episcopal Church today, there are fewer clergy searching for work than there are open positions, the majority of whom are looking for full-time work and/or will not relocate for a part-time position. For these reasons, constellations sharing a priest will support a full-time position.

The covenant between the congregations is a clear statement of expectations and tasks/roles for the clergyperson and the other leadership—vestry, worship leaders, preachers, outreach ministers, etc.

There are usually separate facilities, mostly separate programming, and separate church budgets. In some arrangements, the clergy compensation, the costs of some mutual programming and mission, the cost of any other supporting staff may be shared. There are also instances when the vestries of the congregations combine into one. When sharing clergy leadership, the combination of vestries, committees, and obligations will assist the clergy person in managing time and increase capacity for ministry and new initiatives.

**Merging:** Combined congregations are a result of an organic union or merger of two congregations. The original congregations are dissolved, and a newly named congregation is established.

With Constellations or Merging, the process can be within the same denominational structure or among members of different denominations. When the process includes denominations other than the Episcopal Church, there are additional complications to be considered.

There are a variety of reasons which lead congregations to consider a cooperative ministry with one another. Ideally, congregations approach one another about cooperation out of a desire to strengthen the mission and ministry of the church in their wider community. It must be recognized, however, that most often the motivation to come together occurs because of a perceived problem in one or both congregations.

Sometimes the strength of one or both congregations is perceived to be declining, at other times the congregations are not able to keep up with the increasing costs, particularly of clergy or facilities.

Those who are helping provide leadership to the efforts of congregational cooperation, need to understand that initially many members can perceive the idea of a new cooperative arrangement as less than desirable, and as giving up something valuable. Whatever the initial motivation, for the venture to succeed, it is necessary that the congregations who enter this new cooperative arrangement view the arrangement as a way of strengthening their congregation's mission and ministry. Even if the initial motivation is simply out of a sense of survival, unless the members of the congregations envision the effort as a faithful response to God's call to service and witness in the community, the ability to meet the challenges of cooperation will most likely not be present. The conviction that the larger community/area/town/region deserves a better witness and better stewardship from the cooperating congregations is the solid foundation upon which to engage in congregational cooperation discussions.

It bears repeating: Unless congregations considering such cooperation can see and affirm within their exploration the possibility of enhancing their identity as the Body of Christ and their ability to act as such in their wider community, the effort to merge will likely not achieve its potential. Thus, all those involved in leadership need to find ways for members of all the cooperating congregations to acknowledge and own this goal.

## Identifying and addressing issues

When a congregation is considering exploring cooperation with one or more congregations, it should keep in mind some of the following questions and issues:

- Are there other options besides congregation cooperation that should be considered? (These options should have been considered in Chapter 3.)
- Are the congregations we are considering cooperating with compatible with us from the perspective of theology, worship style, polity, mission commitment, tradition, etc.? If no, would the combination of financial resources, and a commitment by your new partner, enable the funding of congregational development training such as the College (see above)?
- Is there a denominational congregation(s) in official relationship with the Episcopal Church, that is willing to enter a partner relationship with our congregation?
- Describe your congregation's relationship with the other congregations/organization/s. In what ways do the ministry of your congregation intersect with the mission of the other congregation/organization/s?

## From informal to formal conversation

When the conversation moves from an informal discussion of possibilities to a more formal exploration, there are several principles to follow:

- The Diocese must be involved in any conversation which takes place regarding formal cooperation of congregations. Before beginning exploration with another congregation, contact the Canon for Missional Vitality.
- Anticipate and be clear about decision-making processes from the beginning. Typically, a joint committee between congregations should be formed to guide the effort. Diocesan ministers can assist you in understanding and selecting appropriate decision-making processes for each task. This joint committee must have a plan for regular communication with the Diocesan ministers and designated member/s of the Diocesan Congregational Discernment Committee. Develop a proposal for cooperation to be considered by the congregations. The proposal should include a mission statement.
- Keep the congregations and the diocese thoroughly informed as the formal discussions proceed. It is very important for all congregations (and the diocese and if necessary other judicatories) to receive identical reports. It does great damage to the process if rumors are allowed to circulate or if the congregations have different perceptions about what is happening.
- Create ways for members of the congregations to become acquainted with one another. The exploration process is enhanced when fellowship and educational events for members of all congregations are planned. This allows members to become better acquainted and provides opportunities for them to engage in activities in one another's facilities.
- Maintain careful records of all meetings. Include in the minutes all agreements reached.
- Before any decision is made, the Bishop, Canon for Missional Vitality, and members of the Diocesan Congregational Discernment Committee should all be informed. The Bishop and other diocesan leaders will provide an estimate of what each congregation will contribute to this process and will have final (legal) approval of any mergers of mission, ministry, property, or assets.
- After the decision has been made, it is important to celebrate the process and the decision. If the decision is to enter a cooperative relationship, a special liturgical service needs to be planned and held for all the congregations involved to celebrate their anticipated future and offer it to God.

For cooperation between denominations additional considerations are important:

- Is this cooperation with an ELCA congregation, which would allow sharing of clergy, liturgical, and other resources?
- *Building only:* Is this cooperation in use of a building, but not on clerical or liturgical matters, with a congregation in another denomination such as UCC or UMC?
  - How will the space be used and when, by whom?
- *Cleric:* What is the denominational identity of the local cleric who will shepherd the congregations in the future?
  - How will the cleric be selected? ○ Where will the cleric live?

- How will the cleric be compensated?
- What is the cleric's job description and priorities?

Depending on the denomination these questions can be answered differently. It is important to carefully discuss these issues prior to any formal arrangement of cooperation.

- *Denominational assistance:*  
It will be necessary to have a clear understanding of which denomination will provide what type of assistance.
- *Denominational relationship and participation:*  
This issue has to do with how the cooperating congregations participate in the life of their respective denominations, such as in diocesan meetings. It is particularly important that cooperating congregations and their denominations recognize the demands on a cleric who is expected to be a participating member of different denominations.
- *Standing and membership of cleric(s):*  
The official recognition, membership and standing of the cleric in the cooperating denominations needs to be determined. It is important to be clear how the denominations participate in support of the cleric, as well as how they participate in oversight and discipline of the cleric. Generally, it is better to have one of the denominations carry primary responsibility and to involve the other denominations at critical points of support or discipline.
- *Membership and participation of the cleric's family:*  
For clerics with families at home, the issue of membership and expectations of participation of their family members in the life of the cooperating congregations needs to be clarified. In most cases, it is unreasonable for multiple congregations to expect that members of the cleric's family will participate fully in the worship, education and other activities of all the cooperating congregations. While it should be permitted, it should not be expected or required.

## Upon deciding to merge:

Once any type of collaboration (constellation, merger, etc.) is being explored, before making a decision, you are strongly encouraged to develop an exploratory experiment that documents your congregations being together. Additionally, when a decision has been made, experimentation which includes documentation, will continue to be a very powerful tool for discernment and decision making.

It may even inform your decision to keep or sell a building. Name of the experiment, what you hope to learn, measurable data (how many people from each congregation participated, on a scale from 1-10-how comfortable were you in the space etc.) what did you learn from the experience? What did the data teach you?

At the outset is it important to have well defined procedures whereby the arrangement can be modified as needed. How are dissatisfactions with any of the arrangements addressed? If the scheduling of Sunday morning turns out to be unsatisfactory for one of the congregations, how does it the congregation raise the issue and have their dissatisfaction addressed? If one of the congregations can no longer meet the financial obligations of the cooperative arrangement, how is this to be handled?

These questions highlight the importance of having an official deliberative and decision-making process to which all have agreed. Typically, some sort of joint vestry or Bishop's Committee (or similar body if between different denominations) is established where these issues can be brought and discussed. If the congregations retain their own separate vestry/Bishop's Committee, a combined committee may be established to handle these and other similar questions.

## When cooperation involves going from two (or more) facilities to one

A strong component in shaping the identity of any congregation is its worship and meeting place and other physical facilities. In cases where the cooperative arrangement calls for a single facility, in place of two or more facilities currently being used, there are many issues to be explored to prevent feelings of "why should we pay for upkeep of *their* building."

- Obviously, an initial consideration must be whether one or both current facilities meet the needs of the new cooperative relationship. This includes considerations of size, condition, and locale in relation to where members live.
- Location also needs to be considered from the perspective of visibility and image of the congregation in the larger community, as well as the perspective of the location most conducive to carrying out mission and ministry within their local context.
- It is often very difficult for the members of one congregation, especially if it is perceived to be smaller or weaker than the other, to move to another congregation's facilities without feeling that they are losing something important in the newly formed relationship. It is not "just" a building—it is a part of their cultural identity and DNA. Therefore, this issue requires careful exploration. In some cases, cooperating congregations might explore whether a new facility is possible, thus allowing for a new identity to be established. If one of the existing facilities is to be used, careful planning needs to be done for the installation into that facility of important and symbolic components and furnishings from the other congregation's facilities.
- When cooperation is between denominations, it is important to keep in mind that ownership of congregational facilities may be different for congregations of other

denominations. This underscores the importance of full participation by representatives of the denomination's judicatories in these discussions.

## Worship scheduling in Leadership Sharing

A critical issue when sharing leadership is the scheduling of worship. For the cleric to conduct services in each congregation, distance and driving time needs to be considered.

Changing the time of worship is one of the most difficult changes for congregations to make. If new times are selected, they should be maintained for substantial periods of time and evaluated for effectiveness.

The value of having the cleric available for interacting with members either prior to worship or following the service also needs to be considered. It is often necessary to consider having the cleric at worship on an alternating Sunday basis. Some consider having a weekly service on Saturday or midweek as an alternative.

Skilled and trained lay worship leaders, lay liturgists and lay preachers must be part of a sustainable and equitable long-term solution.

As a final analysis, when considering conflict regarding worship scheduling, you may want to ask yourself: how might these differences be included in a healthy cooperative relationship? It is important to remember that the challenge of scheduling does not outweigh the benefit of the collaboration.

## Worship forms and Christian formation

Successful cooperative arrangements between congregations requires a certain degree of theological and liturgical compatibility among them. The need for pastoral adaptation to very different theological viewpoints and diverse worship forms and practices should be kept to a minimum. The cleric should not be expected to prepare for and conduct completely different worship services for the cooperating congregations.

Because music and Christian formation are two parts of the congregational life which are highly emotional, as well as reflective of theology, issues related to them need to be explored if worship and formation are to be shared experiences. Clear expectations of the cleric's role and responsibilities for oversight in these areas should be mutually agreed upon during the formal discussion time and included in the final agreement.

# Chapter 6: Deciding to Close and Steps in Closing a Congregation

## Death and dying

Individual congregations like individuals — Moses, Joshua, you and me — are not immortal. **The closure of a congregation does not signify failure.** A congregation like an individual is born, grows, may get sick, can recover, will age and might eventually die.

God was not downplaying the significance of Moses' leadership with the Hebrew people when God turned to Joshua to push forward after Moses died. God asked Joshua to do the work that needed to be done. History and events should be considered a blessing and be celebrated. Time moves on and so must our ways of accomplishing ministry. Look forward and see what God can do. Closing the doors does not stop the plan of God. God's plan moves forward even when there are apparent problems in a church. God can use the seed found within a closing church to produce more fruit and enable one's church to provide an eternal legacy.

A decision to close a congregation is not easy. Emotions run high, and a sense of failure may pervade the hearts and minds of those remaining. It is important to remember that for Christians, dying is not the end. Remember how Jesus taught that a seed must die in order to bear much fruit. We lose our life in order to gain it. This is true for individual Christians and is also true for our congregations. If a congregation is clinging to survival for its own sake, and not for the sake of Christ and his mission, then something is amiss.

Just as individuals experiencing change and loss go through stages of grief, so do congregations. As the various stages of grief are experienced by congregational members, lay leaders, and clergy leaders, it is important to acknowledge them. In her now classic model, Swiss Psychiatrist Elizabeth Kubler-Ross outlines five stages of grief: denial, bargaining, anger, depression, and acceptance. As with any grief, everyone experiences it uniquely, there is no set timeline, nor is there a set order for "moving through" these stages. Different issues will affect different people in different ways. Different people within the congregation will be at different places in the grief cycle at any given time. Acknowledge this, and respect where different people are in their grief process.

It is tempting to think in terms of "completing" a stage of grief. However, the experience of "returning" to one or more of the stages at unexpected times and in unexpected ways, even after many years, is normal. Grief, the longing for what has been lost, never fully retreats or disappears, even when something good emerges later. The process of grieving is a journey not a destination. There is always something valuable to be learned along the way about living fully until we die.

Good communication is important at any time. In a time of crisis, change and loss, open and honest communication is particularly important. Engage in active listening. Be open about the process. Involve as many voices as possible in your discernment conversations. Allow everyone to be heard.

Do not underestimate the strength that comes from having companions on the journey. “Mutual conversation and consolation” among the community of believers is truly a means of God’s grace. Especially during difficult times, draw on the strength and insight that comes from corporate worship, bible study, and prayer.

Also do not underestimate the power and significance of material things. It is normal for people to have powerful emotional attachments to such things as pews, stained glass, cemeteries, communion ware, and even silverware and furniture. This is not simply a matter of idolatry. Everything in a church develops layers of meaning over time. Every object can accumulate layers of stories and powerful emotional resonance. Find ways to respect and honor the significance of these objects, even—and especially—as you are letting go.

## Important

When closing a congregation, there are two important points always to keep in mind:

1. Congregational leaders must communicate clearly and often with members of the congregation. They must be completely transparent about the issues to be decided and what meetings will be held where important decisions will be made.
2. Thorough minutes must be kept of all discussions and actions.

## Stages of Grief

While going through the process of deciding to close a congregation and then following through with all the steps necessary for the closing, all involved will go through the various stages of grief: denial, anger, bargaining, depression, and acceptance. Unfortunately, not everyone will go through the stages in lockstep nor at the same speed.

Understanding of and proper attention to each person’s stage in the grief process will facilitate following the steps needed to close the congregation.

## Discernment

The ultimate decision to be made by a congregation is what God desires of it. Once a determination is made that it might be best to close, the congregation enters a time of discernment of how to best leave a legacy and provide new life from this closing.

## Leaving a legacy

Just as an individual should plan, so a congregation nearing the end of its life cycle can think about how the story of their past ministry might be remembered and shared.

Use the following questions and issues as starting points for your conversation:

- List your congregation's knowledge, experience, passions, imagination, and spiritual gifts.
- List the congregation's commitments and energies in the past.
- Is the mission and ministry of your congregation known to others in the wider community? Are you providing recognized and important services such that your primary identity is that of service others? Look for themes in your list. Use this list to help craft your story.
- Identify objects and documents that have real historical value. Take steps to preserve and archive these so that others can learn from them.
- Find ways to tell, share, celebrate and preserve the congregation's story. This is also a legacy for the wider church and your geographical region.

## Diocese

Whenever the possibility of closing might be an option for congregational leaders, the Bishop's Office should be contacted immediately. The Bishop and the Bishop's staff, including the Canon for Missional Vitality, Canon to the Ordinary for Cultural Transformation, and members of the Diocesan Congregational Discernment Committee can provide the resources and guidance needed for congregational leaders. **In the Episcopal Church, the Diocese has ownership of and control over all property; however, your prayerful and thoughtful guidance and input will be used as the process moves forward.** It is important to note that it is the responsibility of the Standing Committee to approve the acquisition, encumbrance or selling of property in the diocese. Therefore, a representative from the Standing Committee must be part of the Congregational Discernment Committee Team assisting this process.

## Decisions

The closing of a congregation involves two primary decisions:

1. When to close, which includes what process will be followed and the scheduling of a final celebration worship service whenever possible.
2. What to do with the property and resources (worship appointments, Sunday School material, etc.) of the congregation.

**Both of these decisions are made by the Bishop** in consultation with the leadership of the congregation, the Standing Committee, members of the Diocesan Congregational Discernment Committee and the Canon for Missional Vitality.

## Communicating Decisions

The decision to close a congregation needs to be thoroughly communicated; this should be coordinated through the office of the Bishop. Be sure in your communications to include:

- Everyone on the congregational roll and congregational friends including regional members
- Former clergy who served the congregation
- The Press/Media outlets
- Programs and institutions who use the space (AA, Scouts, etc.)
- Mission partners: local, regional, national, international, ecumenical, interfaith

## Closing Operations

Some of the closing operations are the work of the congregation; some work properly belongs at the diocesan level. We strongly suggest that the congregation have a team of two or three people who will work with the members of the Diocesan Congregational Discernment Committee to address each of the points below.

## Pastoral Care

A chaplain may be appointed by the Bishop for the care of the congregation in the time of discernment and transition. The chaplain will meet with the Canon to the Ordinary for Transition Ministry and any clergy serving the congregation to learn about special needs of the congregation and to discern the duration of the work. This person may be lay or ordained depending on the needs of the congregation and may be reimbursed by the diocese at the daily rate for supply clergy or work without fee. Reimbursement to the diocese will be made at the time of the sale of the building and/or settlement of accounts.

A chaplain may be appointed by the Bishop for the care of the congregation in the time of discernment and transition. The chaplain will meet with the Canon for Missional Vitality and any clergy serving the congregation to learn about special needs of the congregation and to discern the duration of the work. This person may be lay or ordained depending on the needs of the congregation and may be reimbursed by the Diocese at the daily rate for supply clergy or work without fee. Reimbursement of these expenses to the Diocese will be made at the time of the sale of the building and/or settlement of accounts.

## Closing liturgy

The Closing liturgy will be planned by the Bishop in consultation with the Clergy, Wardens, Chaplain and others, as appropriate.

## Physical Plant: Congregational work

1. Construct a list of deferred maintenance projects and their estimated costs including environmental items, i.e.: asbestos and lead abatement.
2. Arrange for locks to be changed.
3. Make a list of vendors who work on the building and who may be needed in the mothball stage (plumber, electrician, groundskeeper). Plan to maintain landscaping/plowing in mothball stage.
4. Copier leases and other equipment leases are reviewed.
5. Manage current lease arrangements, determining “quit date” for tenants (Scouts, food pantry, etc.).
6. Remove all signage from around town, including “The Episcopal Church Welcomes You,” and other forms of advertisement (website, newspaper listings, phone directory, etc.)

## Physical Plant: Diocesan work

1. Install, if needed, a security/alarm system and determine who will serve as caretaker.
2. Diocesan Property Manager conducts a walk-through and notes current condition of building and prophylactic measures for mothballing. (i.e.: care for organ, bleeding pipes, reducing heat to minimum, humidifiers installed, etc.)

## Stewardship of Goods and Property: Congregational work

1. Inventory all goods of any value, including churchware, vestments, statuary, vessels, furniture, machinery.
2. Contact the Diocesan office and arrange for appointment to help with inventorying/collecting goods for diocesan archives (Church histories, artifacts records, etc.).

3. Make a list of other church goods (i.e.: Sunday School tables and chairs, dishes, choir robes, etc.).
4. Inventory all groups/organizations who use the church/building (Food pantries, freeze shelters, soup kitchens, counseling practices, nursery schools, AA and other groups, thrift shops, etc.) and give adequate time for these ministries to be re-located.
5. Make a list of all goods to be given back to donors and goods other churches have requested and give this to the diocesan offices.

## Stewardship of Goods and Property: Diocesan work

1. Arrange for archive materials to be transferred to diocesan offices.
2. Work with congregation for disposition of all goods.

## Records: Congregation work

1. Gather all congregational records, including the parish register, all minute books, and all financial records.
2. Develop a list of all records.

## Records: Diocesan work

1. Appraise which records are required for the formal closing of the congregation and which need to be archived.
2. Plan for the proper disposal of records no longer needed.
3. Visual materials such as photographs, videotapes, and films also provide a record of the congregation. Determination will need to be made of which visual materials are to be retained and how to best archive them.

## Legal: Congregational work

1. Please contact the Chancellor of the Diocese for help and for any questions that involve legal aspects of this process.
2. Follow the congregation's constitution and canons and congregational by-laws with respect to making the decision to close. If the by-laws do not provide guidance around the closure of the congregation, the Bishop's Office and Chancellor will advise.
3. Contact the Bishop's Office regarding the transfer of the congregational register, minute book, and other legal documents.

## Legal: Diocesan work

1. The Chancellor, and members of the Diocesan Congregational Discernment Committee as appropriate, shall work with the congregation for all legal matters regarding closing.

2. Upon closing, file any required legal documents with the Diocese, as well as with county, state and federal governments.

## Membership: Congregational work

Arrange for any remaining members on the congregational role to transfer their membership to another congregation.

## Property: Congregational work

1. Inventory the contents of the building(s).
2. Discontinue utility services no longer needed and transfer all other necessary utility service accounts to the diocese for payment.
3. There are significant limitations on encumbering and selling assets due to restrictions on disposing of property, especially buildings and other real estate. The congregation is not allowed to negotiate to encumber or sell property without permission of the Diocese. (see appendix C)
4. If there is a cemetery or columbarium special accommodation should be offered to the families. Please check with the Chancellor for more information about how to deal with the cemetery or columbarium.

## Property: Diocesan work

1. Arrange to secure the building(s) until ownership is transferred. Security includes maintaining fire and liability insurance, keeping the buildings securely locked, designating someone to regularly check the building, and maintaining needed utilities.
2. Arrange for the exterior of the property to be maintained (lawn mowing, weed control and snow removal).
3. Decide, in conjunction with the congregation, Canon for Missional Vitality, and members of the Diocesan Congregational Discernment Committee what to do with the contents and with the building(s).

## Financial and administrative: Congregational work

1. To be collected and given to diocesan Financial Administrator:
  - Seven years of financial records including general ledgers software, passwords for computers, information on hard drives Check books, registers, pass books
  - Bank statements including cancelled checks
  - Credit cards
  - Financial statements, including balance sheet and income & expense sheet
  - Paid and outstanding bills
  - Pledge and giving statements

- Parochial Reports, audits and accounts (should also be on file at the diocese offices)
  - All human resources/personnel files and records
  - Membership records
  - Parish records and registers
2. Create a list of all financial accounts, (checking, CDs, outside brokerage firms, savings, discretionary funds, ECW, Altar Guild, Youth Group savings, etc.) Include account numbers, signatories, phone numbers of signatories. Close and transfer to custodial account.
  3. Notify all vendors of change of billing address to reflect the diocesan office address at: 5 Rock Point Road  
Burlington, VT 05408-2737  
ATTN: Diocesan Financial Administrator
  4. Give authority to diocesan Financial Administrator to manage accounts.

**In the Episcopal Church, the Diocese has ownership of and control over all assets, however, your prayerful and thoughtful guidance and input will be used as the process moves forward.**

We welcome the congregation to share ideas regarding disbursement of remaining congregational funds in ways that can continue the mission and legacy of the congregation. Generally, proceeds from the sale of a building will be funneled into these areas:

The diocesan investments that fund the Butterfield fund, to supply grants and loans to further the mission of our congregations across the state, formation for congregations, congregational development, and lay leadership development.

## Cemetery

If the congregation owns a cemetery, either the ownership must be transferred to another entity or the congregation must provide funds for the annual upkeep of the cemetery.

Use the checklist provided in **Appendix A** to keep track of all the legal, ecclesial, financial, and practical steps involved in closing a congregation.

# Chapter 7: Making Closure, Ending in Hope: Planning a Final Service

In the multi-step process of closing, your congregation will experience a variety of emotions of varying degrees: anger, grief and nostalgia, anxiety and hopefulness about the future. Some of the members may feel relieved; some may worry that by closing, your congregation and its witness will be forgotten. A final gathering time and service can be an important way to acknowledge your congregation's history and witness in the community; it can give voice to the pain of loss that many are feeling about closing; it can be a lasting testimony to the community. Gathering with members, friends, the community at large, and other congregations who may be joining in ministry, is a public sign that God's mission continues and extends beyond our temporary buildings.

Below are some suggested steps your congregation may want to consider as you together plan for the final gathering and service. We have also included a Service of Leave-Taking for use when a congregation is leaving a church-building that has served its mission, or for when a congregation is closing.

## Steps to consider when planning the final service:

1. Have a meal. For centuries, when Christians gather to mark a life-changing occasion, food is shared. Think what weddings and funerals would be like without the shared meal after the gathering. Even baptisms and confirmations have their traditional cake or luncheons. Sharing one last meal in the beloved kitchen, using the space of the building that your congregation is leaving, is a testament to your shared spiritual life together in this place.
2. Invite current and former members.
3. Invite the community. This service is their chance to say farewell and Godspeed to your congregation and its witness in the community.
4. Invite other congregations. Especially invite a congregation you may be merging with, or a congregation that has been identified as the primary congregation your members will be joining. This can be a powerful testament to the mutual ministry you share in Christ.
5. Plan the service with care and attention. The Bishop will work with you to plan the service. Be intentional about the final procession, where items commonly used in the congregation's worship life are carried out of the building for the last time. Plan who will carry these items and what the person carrying them is to do with them at the end of the procession. You may also wish to incorporate the church's mission statement in a part of the liturgy.

# Appendix A: Congregational Discernment Committee – Teams

## What is a Congregational Discernment Committee Team?

This is a team of Episcopal Church colleagues and leaders from across the Diocese who come together, coordinated by the Canon for Missional Vitality, to assist a congregation in making vital decisions about its next steps toward revitalization, creating a constellation or shared ministry model, or closing. The Bishop, in consultation with the Canon, will identify the need for this level of care and support for a given congregation.

This team, typically of 5-6 people, may include:

- Canon to the Ordinary for Cultural Transformation
- Clergy and laity from another congregation in the diocese
- Diocesan Financial Administrator
- Standing Committee representative
- Diocesan Trustee
- Diocesan Chancellor
- Diocesan Treasurer
- Other diocesan staff
- Other clergy or lay leadership from diocesan committees as needed

## What is the process? When is a Team called up?

The call for a Team can come from the Bishop or the leadership of the congregation itself. In this case, the clergy or Senior Warden will contact the Canon for Missional Vitality to request a Team be formed.

Once the Bishop or the congregation requests a Team to assist them in the process of discernment, the Canon for Missional Vitality will assemble the Team to assist the congregation leadership in the discernment and procedures for their next steps. This Team may not need to be active until the congregation has done some prior discernment and decision-making.

The document that will guide this process, to be used by the congregational leadership is called ***A Manual for Congregations in Discernment of Vitality and Sustainability: A Resource for Congregations Facing an Uncertain Future***. A congregation will notify the Canon once they begin use of the Manual; however, a Congregational Discernment Team need not be formed until the congregation has decided whether they are considering revitalizing, restructuring, or closing.

**Note that the Bishop will be notified of every Team request and may choose to participate on the Team. The Bishop can call a Team to assist a congregation at any time based on concern and assessment of need.**

## What are the Team's responsibilities?

The Team's responsibilities will vary based upon the needs of the congregation as identified in the discernment process. The Team can be called up to assist in the following matters:

Creating a constellation with another congregation or proposal of shared ministry: to address questions of consolidation of resources, sales of property, finances/stewardship, roles and responsibilities etc.

Closing a Congregation: pastoral care, closing liturgy, physical plant, stewardship of goods and property, records, legal considerations, financial and administrative matters.

Critical moment of need for Diocesan conversation: this can include diminished ministry and mission in community, financial concerns/asset management, property sale, or concerns beyond congregational scope, etc. (This moment can be determined by Bishop, the Canons in consultation with the Bishop, or initiated by a circumstance and request from congregational leadership).

## How often/frequently will Teams meet?

### **Orientation Meeting for the Team:**

A Congregational Discernment Team will meet first as a Diocesan group for an orientation, by the Canon for Missional Vitality, to the needs and discernment of the congregation.

### **Team Meeting with Congregational Leadership:**

Following the Orientation, a Team meeting with the leadership of the congregation will be convened by the Canon to begin consultation. At that time a schedule and next steps will be established. Three combined meetings of Team and congregational leadership will continue until a mutually agreed upon end to their work (usually 6-12 months). The regularity of the meetings will depend upon need and tasks to be accomplished.

Between scheduled Team meetings the Canon will assist the congregational leadership in moving forward in any further discernment or process. The Canon will establish the schedule for and facilitate meetings.

# Appendix B: Checklist for Steps in Closing a Congregation

## Diocese

- Contact Bishop's Office, notify the Canon for Missional Vitality and the Diocesan Financial Administrator

## Records

- Gather all records and make a list:
- Articles of incorporation, constitution, bylaws
- Parish register
- Minutes: congregation meetings and congregation council meetings
- Minutes: committees and groups (i.e., ECW)
- Newsletters
- Worship bulletins
- Property papers: titles and deeds
- Insurance policies
- Annual statistical reports
- Annual audit reports
- Printed histories
- Congregational directories
- Audio and visual records including photographs, videotape, and films
- Church cemetery records if applicable
- Appraise which records to maintain and which to forward to the diocesan office
- Appraise records to archive
- Dispose of records not needed

## Legal

- Contact the Chancellor of the Diocese
- Engage an attorney if needed
- Conduct formal congregational vote to dissolve
- File legal documents with the Episcopal Diocese of Vermont
- File dissolution forms with the county and State of Vermont
- File dissolution form with Internal Revenue Service

- Transfer parish register, minutes, and other legal documents to the diocesan office

## Membership

- Arrange for transfer of membership for all members

## Cleric

- Finalize payments to the cleric
- File any forms related to cleric's end of call

## Property

- Inventory the contents of the building(s)
- Arrange to secure the building(s) until ownership is transferred
- Designate person to check building regularly
- Discontinue utility services no longer needed
- Arrange for the exterior of the property to be maintained (lawn mowing, weed control and snow removal)
- In consultation with the Bishop's Office, decide what to do with the contents

## Financial

- Catalog all financial accounts
- Arrange for bills to be paid promptly until closing is finalized
- Transfer all accounts to the diocese

## Cemetery (if applicable)

- Transfer ownership OR
- Establish fund for cemetery maintenance in perpetuity

# Appendix C: Diocesan Support for Dissolution of Congregations by Congregational Discernment Committee Teams

**Attention: The Board of Trustees and the Chancellor of the Diocese have oversight of the sale of any Diocesan property.**

The Congregational Discernment Committee is responsible for assisting congregations in all matters involved with the closing of a congregation. The work with a congregation will conclude when the Bishop and Diocesan Council determine that all dissolution matters have been satisfactorily resolved and all funds distributed.

Members of this committee include the Bishop, the Financial Officer, th, a representative from the Standing Committee, a representative from the Board of Trustees, the Chancellor, and any other members of diocesan staff, council or the diocese needed as determined by the Bishop.

*For closures, a specific Team on the committee will be formed to assist the congregation with the following:*

## Oversight of Closure Process

Work with and advise any remaining congregational clergy and vestry members. If there are none, the Team (with oversight from Bishop, Trustees and Chancellor) will assume the complete function of closing the congregation.

The Team should ensure that official meetings in congregations dealing with closure have thorough meeting minutes. The Team itself also needs to maintain official minutes of all actions and communication with congregations.

## Members of Congregation

Provide for the transfer of membership and for the pastoral care of all members remaining on the membership role.

## Congregational Records

Bring the Congregation Register up to date. As part of the final actions, see that the Congregation Register and all other congregation records are delivered to the diocesan offices.

## Property

The Board of Trustees and the Chancellor must oversee the handling of all diocesan property: Until the property is sold, if it is to be sold, the Board of Trustees and the Chancellor must oversee any sale and provisions must be made for the maintenance of the property (both interior and exterior) and maintain adequate fire and liability insurance until sale.

Oversee the sale and distribution of all items within the building(s).

As soon as possible after the building(s) are emptied, arrange for the sale of building(s) and property.

## Cemetery

If the congregation has responsibility for a cemetery, provide for the on-going maintenance and insurance of the cemetery.

If possible, transfer responsibility for the cemetery to another entity. If responsibility cannot be transferred, provide for maintaining the cemetery including sufficient financial resources from the congregation's assets.

## Finances – in consultation with the Diocesan Financial Administrator

Until the property is disposed of, provide for the timely payment of bills, the receipt of income, the maintenance of financial records, and the prudent security of all financial assets.

Inventory all assets including investments.

After all property is sold/disposed of, execute the distribution of funds according to the established guidelines for dissolution of congregations.

## Legal – in consultation with the Chancellor of the Diocese

File all legal dissolution forms with government and ecclesiastical agencies.

Make certain all congregation records, including final financial records, are given to the diocesan offices.

## Celebration Service

If there are enough members remaining at the time of closure of a congregation, the committee should ensure that a worship service of celebration be held at the time of formal closure. Such a worship service, following the suggestions of this document and the requirements of the Book of Occasional Services, will celebrate the life of the congregation and the legacy it is leaving. If possible, recipients of any congregational gifts should attend the worship service to receive and acknowledge those gifts. The Bishop's Office will be a resource for planning the closing liturgy. The Bishop will be the presider of this service.

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