

# **The Planning Study Report**

**for the**

**Diocese of Fredericton**

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*Prepared by a consultant team from General Synod*

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*“For surely I know the plans I have for you,” says the Lord...”to give you a future with hope.”* Jeremiah 29:11

## Introduction

A consultant team from General Synod's *Letting Down the Nets* (LDTN), an initiative of General Synod based on educating and empowering church leaders to improve the ongoing financial capacity at all levels of the church, was retained by the diocese to conduct a Planning Study. The study was conducted by Geoff Jackson and Rob Waller from July 15<sup>th</sup> to August 30<sup>th</sup>, 2008 and consisted of personal interviews and focus groups with individuals associated with parishes in various parts of the diocese.

The Planning Study offered a vital opportunity to analyze and test certain factors in the life of the diocese and its regions. Structured conversations or interviews with clergy and lay leaders throughout the diocese's key constituencies reveal opinions and insight into how the diocese needs to move forward with its Shared Ministry vision of healthy congregations and, in particular, a new stewardship initiative.

This Planning Study has been prepared based on information that was carefully gathered from interviews with 42 constituent leaders plus two focus groups comprising 10 participants. The study was to determine where there is energy and motivation to move ahead with the design and implementation of a parish-based stewardship education program, as well as insights into who the potential leaders are for moving ahead and what resources are needed. The next step will include the development of a detailed plan outlining the goals, objectives and strategies for moving forward.

It was the LDTN Consultant Team's task to identify how to best structure and position a stewardship education program as a component of the Shared Ministry Plan within the diocese and also to take the pulse on the ability and inclination of the diocese's lay and clergy leaders to provide leadership support. Not only is this information instrumental in planning the future but it also builds the kind of ownership or engagement that is essential to a faithful and successful response to what God is calling the diocese to be and to do together. **Above all, the Study provides the kind of objective information needed by diocesan leadership to make decisions with confidence about how best to move forward with both the Shared Ministry Plan and the stewardship education initiative.**

The context and purpose of the Planning Study was presented in a document called *Our Journey Moves On!* (Appendix A) which emphasized the following key points:

- The ministry goals that need to be addressed through the Shared Ministry Plan and this stewardship initiative include spiritual needs, congregational needs, generating adequate income and developing thankful, generous Anglicans in our diocese. A biblically based stewardship education program is critical. We are talking about creating an atmosphere for the conversion of the heart.
- The partnership between the diocese and the Letting Down the Nets initiative will provide the resources to develop a comprehensive stewardship education approach. Now we need to work together to identify the particular needs and assets of parishes, clergy and lay leaders, so they can conduct more effective programs. This partnership will also

help us address the variety of challenges our diocese is facing such as declining numbers, amalgamations, rising expenses, lack of youth and the needs of the poor and oppressed.

- Working in partnership with parish leaders, a biblically based stewardship education program will be developed by a newly formed Stewardship Resource Development Group for use throughout our diocese.
- We are asking that you help us to discern and build the plan that will allow us to understand what we need to do, and how to do it in a meaningful way over the next three years across the diversity that this diocese offers while, at the same time, being sensitive to the individual needs and aspirations of each parish.

The objectives of the study were established as the following:

1. To analyze and audit certain factors in the life of the diocese and regions;
2. To identify how best to structure and position the Shared Ministry Plan and a comprehensive stewardship education program initiative within the diocese;
3. To determine how best to deliver what parishes need and want in the design and implementation of a parish-based stewardship education program;
4. To identify recommendations for appropriate communication tools;
5. To clarify the vision and values the parishes would embrace both in terms of genuine engagement and financial support;
6. To determine how best to increase ministry funding at the parish, diocesan and national levels and the development of a major gifts or planned giving program;
7. To encourage clergy and parish leaders.

The study serves as the first step in the development of the diocese's overall stewardship education strategy.

In this report recommendations are included for a diocesan plan covering:

- Shared Ministry Plan implementation and direction
- Ways to strengthen parishes, archdeaconries, regions and the diocesan community
- Strategies to be employed
- Leadership requirements
- Staffing/consultation needs
- Communications plan
- Methodologies and tools required
- Processes to be developed
- Measurement criteria to consider
- Identification of regional priorities
- Identification of potential leaders
- The potential strategies to be implemented for an effective stewardship education program
- The potential strategies to be implemented for an increase in funding
- Recommendations about next steps and timing

The study is now complete. This report contains the findings, evaluations and recommendations that the consultant team believes are crucial to the aforementioned objectives and expectations. The report begins with a description of the study, highlighting the key components of the process.

Appendix B is a copy of the questionnaire that was used by the consultants at the time of the interviews. The responses to the questions were all carefully noted and have been used as the context for the analysis of the strengths, weaknesses, opportunities and threats and then leading to the recommendations that the consultant team believes diocesan leaders should follow in moving forward.

A complete listing of all the responses to the questions has been provided to the Bishop for record purposes but has not been included as part of this report due to the number of pages that this listing consumes.

We want to acknowledge that as this study unfolded it has lead us to a recognition that the diocese is facing some extremely critical challenges that appear to be calling for definitive action and some very important decisions. Either the motive behind this stewardship education initiative is to ensure the financial future of the diocese and its parishes or it is an initiative that takes on a wider scope and opportunity for genuinely engaging the community with the Gospel of Christ through the vehicle provided by the Shared Ministry Plan. This initiative will not be seen to be faithful or successful if it is simply about doing more of the same. There must be a radical and noticeable shift in the way the diocese engages in organizing for ministry.

A word of appreciation is due to Bishop Claude Miller and The Ven. Geoffrey Hall for assistance with the planning and implementation of the study. We are very grateful for the key administrative support and guidance provided by Phyllis Cathcart, who arranged and coordinated appointments for the interviews and the focus groups, as well as the volunteers who acted as hosts at the various locations where the interviews were held. Finally, we extend our sincere appreciation to all interviewees. Everyone was most generous with their time and advice.

It has been a rewarding experience to work together with you in this first stage. It is our goal to be both clear and concise in this report so that it will be of greatest value to you in making the best possible stewardship and planning decisions as you respond to God's leading for the diocese.

Sincerely in Christ,

Canon Geoff Jackson, Senior Development Officer of the Anglican Church of Canada  
The Rev. Rob Waller, Project Consultant, General Synod

## **Analysis of comments expressed during the interview sessions.**

We feel it important to note at this stage that the following comments are those expressed by the interviewees as a consequence of the questions asked from the questionnaire (Appendix B) and are not the comments of the consultants. The comments have been used by the consultants to develop the following SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) regarding the present situation within the diocese as they relate to the following four areas:

### *Vision of the Shared Ministry Plan*

#### *Relationships and Identity*

#### *Leadership, Ministry and Organization*

#### *Anticipated level of Support*

### **Strengths:**

#### ***Vision - Shared Ministry Plan***

- A recognition that the diocese needs to be committed to the same purpose and to one another
- Virtually all interviewees acknowledge that the Shared Ministry Plan could be very important and is a good foundation to build on
- The diocese for some parishes has provided the vital support for their survival and overall success
- Some churches are acting proactively and moving successfully to a 'better' facility for ministry and outreach
- There are new growth (population) areas opening up in the diocese
- Fairly strong church communities in terms of numbers
- There is a focus on youth and the church camp is excellent

#### ***Relationships & Identity***

- People have a strong sense of Anglican identity
- A growing sense that people are ready to take action
- Strong levels of committed active people
- A strong commitment to Christ, scripture and the church
- Clergy are engaging in conversations with one another
- Good people on staff at the diocesan office
- Bishop has led a dialogue about same sex issues
- No parish is going to leave the diocese over the same sex issues

#### ***Leadership, Ministry & Organization***

- There has been good response to some of the training opportunities in the diocese
- The leadership and presence of the Bishop is very empowering...he sets goals and can work towards common goals
- The Bishop builds collegiality
- Bishop is committed to a plan to assist congregations
- Bishop is loved and spends majority of time pastorally with congregations

- Very capable priests and lay leaders throughout the diocese
- Some parish clergy and lay leaders are moving to nurture and deepen a holistic understanding of stewardship and have developed some teaching resources
- Diocesan Council is comprised of very strong leaders
- An evangelical approach to mission established most parishes in the diocese
- Good administration system in the diocese
- Bishop has done well in keeping ‘the situation’ under control
- Good leadership by the Bishop and staff

### ***Anticipated Level of Support***

- Most leaders acknowledge there is financial potential in the diocese especially in particular parishes
- Gift planning is generally viewed as a vital key to the future

### **Weaknesses:**

#### ***Vision of the Shared Ministry Plan (SMP)***

- Diocese generally does not have ownership of the Shared Ministry Plan – lack of consultation (planning has been too exclusive) and approval processes – only a few people appear to be involved in the Shared Ministry Plan (SMP) and only 10% of the diocese has heard of the SMP
- SMP is considered nebulous and there is a very clear need for greater clarity (how it impacts parishes and how parishes can be involved) before any meaningful implementation
- SMP is generally viewed as a diocesan-based ‘game’ plan to cut back on clergy and congregations (marketing of the SMP has allowed people to make their own interpretations due to too little information and communications)
- Bishop and diocesan leaders do not appear to have any kind of an action plan (or even open dialogue) for addressing this ‘we/they’ and the lack of an intentional plan is undercutting virtually any attempts on the part of the Bishop to move forward because any communications from the diocesan office is immediately perceived negatively – the style of the communications does not appear to be experienced well at all
- Parish leaders tend to worry constantly about their parish’s finances
- Parishes have to find their own resources/programs for their growth and development or dealing or other challenges
- A view that the diocese is on ‘the take’ and living beyond its means (this motivates some parishes to protect their funds from the diocese)
- Few parishes are promoting and teaching Biblical stewardship
- There is a diocesan ‘culture’ that avoids teaching parishioners about tithing or giving proportionately
- Only 75% of parishes provide statistical information which causes a lack of good stat info when it comes to realistic and effective planning
- There is a decline in the number of people who can give strong, directive leadership at the rural congregational level
- Most parishes lack both a vision and strategic plan
- There is a perceived lack of a coordinated plan in the Bishops’ and Archdeacons’ work with parishes and no clarity as to the role of the Archdeacons and Regional Deans

#### ***Relationships and Identity***

- The diocese has no communications plan that builds understanding and relationships

- Diocesan history appears to get in the way of any meaningful implementation and the ‘we/they’ culture blocks genuine dialogue that might result in unity
- Smaller parishes perceive that they are being neglected
- There is a growing acknowledgement that collegiality within clergy is really challenging with fewer and fewer clergy in certain parts of the diocese
- There are generally negative feelings towards the diocese and no sense that the diocese is ‘us’
- There is a general lack of trust and mutual respect
- The role and purpose of the diocese is not well understood and is seen to interfere with parish life
- Clergy for the most part feel they are not being heard
- Parish leaders tend to be very suspicious and even afraid of the diocese imposing
- The spirit of communications between the diocesan office and parish leaders tends to be criticizing, scapegoating, fault finding and blaming
- Parish leaders perceive that parishes are blamed for diocesan ills
- There is a perception already that the stewardship program will be a top down initiative – there is a lack of clarity about what the diocese is trying to achieve through this initiative – it has to be something the parishes believe is important
- The diocese is perceived to be imposing program and that parishes would rather do their own thing
- The priest is the only interface (and possibly gatekeeper/protector) between the diocese and the parish
- Success in parishes is perceived to be measured by the number of people in the pew and the ability to meet financial needs
- A healthy parish is generally viewed as one that pays its diocesan amount
- Parishioners do not recognize any benefits in paying the diocesan amount and do not understand what benefit the diocese is to them (there is a strong culture of congregationalism in particular parts of the diocese)
- There is a resistance to most any change that is originated and initiated from the diocesan office
- The parishes generally do not experience themselves as on the ‘same level’ with the diocesan office which encourages a general lack of support for the diocese
- The parishes experience that most communications from the diocesan office is directed to money matters
- There is virtually no awareness of who are the members of Diocesan Council and how do decisions get made
- Parishes know virtually nothing of General Synod or its activities
- There is virtually no sense of parishes or regions working together to assist each other
- There are few people in each region involved in diocesan things
- Lack of support for struggling parishes

### ***Leadership, Ministry and Organization***

- Leadership confusion (and growing congregationalism) as to whether clergy leaders are an extension of the Bishop’s ministry or whether the congregation exists to serve the diocese or vice versa
- Bishop is either not being told or is not hearing the pessimism of ‘the situation’ in the diocese from clergy/lay leaders
- No clear guidelines have been articulated for the roles of Archdeacons and Regional Deans
- Diocese is operating with exactly the same structure as many years ago when it was a much different diocese even though, today, it is in a far different context now with a reducing population, theological differences, a model of ministry that isolates clergy and the parish organization needs to be re-structured
- A growing awareness in the diocese that a few clergy are opting to be consistent trouble-makers without any clear intent on their part to make ‘the situation’ better

- There is a yearning for low cost ‘quick fixes’ to ‘the situation’ and possibly some magical thinking that everything will be alright
- Synod’s are not perceived as a valuable use of time
- Lack of respect for the diocesan office
- Parishes perceive that they seldom request assistance from the diocesan office and those interviewees who spoke about requesting help noted that any response was slow or non-existent
- Decisions from the diocesan office are delivered (communicated) in a ‘cold’ style
- A whole generation of clergy have not been educated in stewardship
- The diocesan office can direct its funds at will without any accountability
- Many congregations are ‘frozen’ simply due to a lack of financial resources
- A perception that diocesan leadership is indecisive
- An absence of meaningful communications (caring with no ulterior motive)
- Three former Bishops are perceived to still hold great influence in the diocese
- A general lack of empowering lay leaders to use intentionally their gifts of leadership
- Diocesan leaders see the lack of integrated and coordinated diocesan committee and planning structures – too many levels of committees heading in too many directions
- The incredible diversity within the diocese makes it virtually impossible to communicate one key message that will ‘connect’ with all parishes
- Diocesan leaders put a lot of effort into their committees but there is a serious lack of coordination
- Lack of clarity about the diocesan decision-making process – Diocesan Executive or Bishop’s Counsel?
- The structure of the church beyond the basic parish structure does not carry any true meaning or significance to the person in the pew
- No one person in the diocese knows everything that is happening in the diocese
- The ‘lines’ between the role of the Regional Deans and Archdeacons is viewed as ‘blurred’
- Atlantic School of Theology is not perceived to be providing the kind of clergy leaders the diocese needs at this time

### ***Anticipated level of Support***

- There is virtually no awareness in parishes about how the diocese spends the funds
- 85% of the people in the pew are perceived to have no understanding as to how their church operates
- The Gen X people give to something that has meaning for them – the church budget is not one of these

## **Opportunities:**

### ***Vision of the Shared Ministry Plan***

- For clergy and lay people to sort out what the Anglican Church in New Brunswick needs to work towards and set goals together
- For the diocesan leaders to pay attention to what is really important
- Parishes must see benefits of this initiative and then they will support
- Teaching parishioners to be motivated in their giving by integrating Biblical principles in their individual and corporate discipleship and connecting the vision for Christian Formation with stewardship
- For parishes to clarify their vision and goals beyond survival and keeping the doors open
- Assist parishes to move away from a ‘rector-centered’ model of parish ministry and explore appropriate alternative models

- So many parishes are recognizing their need for direction, support or expertise
- The diocese provides a strategic plan (and effective strategies) for realizing the Shared Ministry Plan and goals and works to align and unify the diocesan infrastructure
- Amalgamations are necessary and vital to the future
- For a revival
- Recognition that critical parish challenges can create the very motivation and timing for parishes to clarify their purpose and vision which has led to a renewed vitality and re-engagement
- Youth programming and outreach to those in poverty
- Develop an understanding of General Synod's ministries and mission
- The people in northern areas of the diocese will need to know how this initiative will benefit them as they feel isolated from the rest of the diocese

### ***Relationships and Identity***

- Individual leaders and parishes believe they are expendable
- Parishes perceive that they might be viewed as a drain on diocesan resources rather than as a producer of diocesan resources
- This initiative needs to be based in the regions and then to take it directly to the local level and have local leaders give it the leadership it requires
- This initiative offers the diocese the means to be experienced in a whole new way
- The potential for communicating more effectively and intentionally with the diocese's constituencies and age groups.
- Addressing the issues on a regional basis
- Explore an 'elected' regional leadership who are trusted and accountable
- The ability of the diocese to gather together in a day opens the door to innovative planning and strong infrastructure
- Learn relevant ways to communicate to younger people

### ***Leadership, Ministry and Organization***

- The financial model for funding the diocese is perceived as the central 'glue' that keeps the parishes and diocese 'connected' as an 'organization'
- Make the adaptive change from the current 'us' and 'them' organizational structure to a unified, coordinated structure
- The dollar amount contributed by parishes to the diocese is perceived as high now but the actual percentage of income is much less
- Training up a new generation of capable lay leaders and teaching a new attitude to the diocese's fellowship
- Training up parish leaders on welcoming new comers and reconnecting with 'fallen away' Anglicans (this group is perceived as a huge number in the diocese)
- Training up clergy and lay leaders with a new way to speak to a new generation (worship and stewardship)
- Change the parish structure to a more functional model
- A clear amalgamation process that guides and supports parish leaders
- An opportunity to communicate the end results of parish planning – showing the way through taking small steps
- A new diocesan team structure and communications
- The diocesan office could offer resources to parishes from liturgy to congregational development to useful broad-scale stewardship resources
- Development of a new proposed diocesan funding plan for Synod 2009

### ***Anticipated level of Support***

- The 55+ age group in the diocese have the potential to have a huge role and financial impact on the diocese's vision and future
- Effective education formats for teaching stewardship at all age levels
- Some parishes have good financial potential

### **Threats:**

#### ***Vision of the Shared Ministry Plan***

- There is a lot of uncertainty
- The mission of many parishes is survival – a view that 80% of the parishes are in slow decline
- The theology of scarcity is 'crippling' the diocese
- Parishioners rapidly losing the sense (value) of belonging to a 'body' that is global
- The stewardship concept has a somewhat negative image throughout the diocese and with clergy
- A lot of parishes are in the position of stating that want to grow and they also want to stay the same
- Failure of the Episcopal leadership to rally clergy and lay leaders to the bold, new future of the SMP (Shared Ministry Plan) and clearly establish the diocesan priorities for meeting the milestones and timelines for realizing the SMP
- An attempt to correct all the diocese's 'ills' at once

#### ***Relationships and Identity***

- A complex set of problems comprise 'the situation' and there are no simple answers
- The fact that trust and mutual respect has eroded over many years and a renewed spirit of trust and mutual respect must now be built
- The lack of a Diocesan identity and a rapidly declining demographic picture
- A perceived lack of full disclosure by diocesan leadership
- Diocesan office is perceived as too large and ineffective
- A major threat is the history of the diocese and the clear absence of the marks of a Christian faith community that acts together to serve Christ's mission
- Same sex issue appears to be creating isolation
- The fear and anxiety that is produced from hearing about other parish closures
- The diocesan apportionment rate is perceived generally as too high by parish leaders but parish income has been increasing over the years
- A generally held view that the diocese is wasting a lot of money
- Lack of willingness and motivation for parishes to think and act together in local areas and address local concerns
- A number of areas in the diocese where we have too many church buildings

#### ***Leadership, Ministry and Organization***

- There is feeling of apathy in many congregations
- Reduction of priests has caused great insecurity
- A history of disastrous Synods
- Parish representation at Synod - every parish regardless of size and the financial amount given to the diocesan budget has the same number of lay reps to Synod which creates too large a body (and too

many stakeholders concerned about their stake in each decision) for any meaningful and timely decision-making that serves the dioceses' best interests and sustainability and growth

- The retired clergy are perceived as a key stakeholder group influencing Synod's direction
- A perception that at least 10 church buildings really do need to be closed but there is no defined or articulated process to determine the best course of action for 'closing' or 'amalgamating'
- The diocesan infrastructure is not able to adapt to meet the current challenges in the parishes and diocese
- A perceived conflict between Saint John and Fredericton undermines diocesan morale
- Retired clergy are allowed to negotiate their own terms ('entrepreneurial' model) with the parishes where they provide clergy supply
- Some of the dioceses' church are definitely in the wrong location
- The camp still needs to raise some significant capital funds
- The proportional gift to General Synod is being reduced
- The 10-10-10 proposed funding plan has too many misconceptions and these issues must be resolved through the development of a new proposed funding plan to Synod 2009

### ***Anticipated level of Support***

- Clergy are afraid to talk about money
- A lot of congregations are on a 'downward spiral' and are not up to the challenges – the leaders are tired – isolationism in parishes
- Many clergy want their parish to grow but are 'caught' in the bind of addressing issues of the impact of changes and the resistance to change
- Parishes have not enough money for their own ministry and outreach and by having to pay the apportionment they foster the view that the diocese as working 'against us'

## **Consultant's Observations and General Comments**

The aforementioned SWOT analysis has been used as the basis for summarising the consultant's observations and some recommendations for consideration by diocesan leaders.

A suggested way forward for a stewardship initiative follows these recommendations but at this time we believe that the diocese is facing many more challenges than simply initiating a stewardship initiative.

These recommendations are also based on the general experience of the Letting Down the Nets (LDTN) Team with other dioceses and our perception of current trends in Visioning, congregational giving and especially the trend of diminishing support for diocesan (provincial) and national denominational bodies.

### **Some General Comments**

**In the opinion of the LDTN Team, the diocesan 'family' is mired in a complex set of problems that is now at such a crisis point that a planned intervention is absolutely essential to the diocese's sustainability. We are of the opinion that the diocese will continue to decline dramatically unless there is a carefully planned intervention that ...**

- A. allows for new ways of acting together as a diocesan faith community in making meaningful decisions together at Synod that will shift the diocese from decline to a thriving faith community;**
- B. develops well-coordinated strategies and decisions for addressing conflicts, strengthening the role of diocesan leaders, diocesan relationships and communications with parish leaders;**
- C. intentionally addresses the key issues being raised in the study and in particular the relational, organizational and financial governance concerns;**
- D. consults with clergy and lay leaders and builds a foundation of trust and respect in developing genuine ownership of the diocese's Shared Ministry Plan;**
- E. implements a well-coordinated and well-resourced plan for strengthening parishes through a stewardship/ congregational development initiative**

**This is a defining moment in the history of the Diocese and if the Diocese is to truly survive and thrive then the following recommendations will require the diocese's finest leaders to find a new way to work together. This is a crisis situation. There are no magic solutions or 'one-time' fixes here that will create the amount of adaptive change that is required. There will most likely only be one opportunity to make this initiative successful.**

The following recommendations are intended to provide an overarching picture of the key strategies and plan that, if implemented in a well-coordinated way by diocesan leaders, will provide the basis for moving and growing the diocese one step upon the next step.

**This step by step approach is intended to be an *intervention* in the life of the diocese and will require all the dioceses finest leaders making this journey in faith their top priority especially in terms of unity, energy and time.**

At the very heart of this...diocesan leaders cannot move forward together until there is a commitment to building a renewed spirit of trust and mutual respect level between parishes and diocesan office and priests and bishop. Diocesan and parish leaders must find a legitimate way to give themselves 'permission' to consider new ways of doing things and try new organizational options.

There is strong support indicated for the proposed directions as outlined in the Project Overview and the overview of the Shared Ministry Plan. Over 80% of the interviewees stated that the Shared Ministry Plan and stewardship education program was 'very important' or 'important'.

Based on the results of the interviews, it is the LDTN Team's opinion that the diocese must develop clearly articulated strategies in consultation and also continue to build momentum by implementing the proposed next steps.

In the earliest stages the Bishop and the members of the Bishop's Counsel (Bishop, Dean and Archdeacons) will need to take responsibility for finalizing the findings of this report and laying out an initial plan and presenting **a call to action** to the Diocesan Executive.

The demands and challenges of the next steps require that consideration be given to appointing a number of people, respected in the diocese to a new, small group, perhaps styled "*A Diocesan Sharing Ministry Task Group*" having the authority, expertise and leadership capacity around the implementation of the overall direction and initial stages of the Shared Ministry Plan and the proposed stewardship education initiative. In suggesting the establishment of this group we are not suggesting that any authority be taken from the Diocesan Executive but rather the fact that until Synod in 2009 there is a great deal to be done and we do not think that the Diocesan Executive members will be able to undertake the action that is needed. As we understand the situation, at present, Synod 2009 will be faced with reports and recommendations relating to at least three major ministry areas; The Struggling and Rural Parishes Task Force, the Budget Funding Task Force and this Planning Study with its related proposals for a diocesan wide stewardship initiative. It will be crucial for Synod members to see how the recommendations of these various reports link together otherwise people will feel that the diocese is moving in too many different directions at the same time. Therefore, it is proposed that this new task force will ensure that a coordinated approach is being applied to these reports until Synod 2009 when a combined, joint report and call to action should be presented to Synod covering these three major ministry areas, perhaps under the "umbrella" of The Shared Ministry Plan. This kind of coordinated approach may assist people in seeing The Shared Ministry Plan in a new light as it embraces these three ministry areas. The *Diocesan Sharing Ministry Task Group* should oversee the presentation to Synod and provide oversight to the implementation of all the recommendations being made to Synod. By the time of Synod the Stewardship and Financial Development Team (SFDT) will have had time to firmly establish its identity, the core leadership/organization and mandate. The mandate of the SFDT may need to be broadened to include congregational development as well as an objective of having a full-time staff support

position as and when the funding for such a position may be available. *The Diocesan Shared Ministry Task Force* will need to take extra care to engage the Chairs of the existing standing committees in understanding and advocating the overall direction and call to action as well as the clergy/lay leaders of the diocese.

*The Diocesan Sharing Ministry Task Group* will likely need to meet as many as six times before Synod 2009 and work under the direction of a consultant team. 'The group' might be comprised of the following: Bishop; Chair; Deputy Chair, an Administrative Coordinator, Archdeacons, and four appointees of the Bishop. It may need to establish separate task groups to work on communications and special meetings/events.

***In addition to the above suggestion we are also recommending that consideration be given to a total evaluation of the diocese in terms of governance, structures and systems. This recommendation is being made based on our observation that there are many aspects of the diocesan structure and systems that are simply not working at this time and a total evaluation is necessary rather than some "tweaking" of existing systems. This is a major undertaking that is being suggested but one that, if done well, will provide the diocese with a strong base in order to carry out the objectives of The Shared Ministry Plan.***

***The LDTN team is willing to be part of such an evaluation and suggests that, if it is decided to move in this direction then, initially the Bishop provide the LDTN team with two individuals from the diocese to work with in determining a way forward with this proposed evaluation. Some of the observations and recommendations that we make below are already part of such an evaluation but will require more study, review and planning before possible implementation.***

# Consultant's Observations and Recommendations

## Acknowledgment of Study Participants

1. A follow-up letter should be prepared to all participants in the Study thanking them for their participation, providing a brief sketch of the findings of this study report and charting the next steps for moving forward.

## Vision and the Shared Ministry Plan

2. The excellent leadership provided by the Bishop in articulating a compelling vision and direction for the diocese has established a good base of support (and hope) for the four pillars outlined in the Shared Ministry Plan. The Bishop has a vision for the diocese that it will embrace being an Episcopal church and that all clergy will work together as a team.

However, The Shared Ministry Plan has been in the making for three years and is considered too vague and too changing with virtually all interviewees stating that they need a much clearer picture as to how they can be involved in it and how it will impact them and their parish including the ministry that happens there. In the minds of interviewees the Shared Ministry Plan has not provided any tangible results so far.

The Shared Ministry Plan is generally viewed as a plan to cut back on clergy and amalgamate parishes. It is our opinion that there is simply not enough “buy-in” within parish leadership at this time to move forward with this plan in an effective way. More work needs to be done on the actual plan relating to each of the four pillars. However, all interviewees acknowledged that the Shared Ministry Plan *could* be very important to the diocese and that it does provide a good foundation to build on.

There is a recognition within the majority of the interviewees of the need to be committed to the same purpose and to one another within the diocese. The Shared Ministry Plan is key to making this happen. At this time there is a lot of uncertainty and meaningful communications is simply not happening about either the dioceses finances or the Shared Ministry Plan.

3. There is concern that the majority of the Bishop's time is spent travelling ‘putting out fires’ – meeting pastorally with parishes over pastoral issues. Conversely, there are those who feel neglected by The Bishop in times of need. There is a clearly identified need, at least in the short term, for the Bishop to have a stronger presence in the diocesan office and direct his time to meeting some strategic objectives (yet to be determined) and provide greater oversight and supervision to the way the diocesan office connects with parishes and leaders.

4. This is a large diocese where there are considerable differences in culture, history and economic conditions in different parts of the diocese. It would appear that the majority of the clergy are serving in rural areas where many churches are in slow decline. For many their mission is simply survival, especially in the rural areas. The challenges for clergy and diocesan

leadership are immense. It is a deep concern how many clergy have become quite isolated in their parishes feeling that they have limited support or resources.

Although there is a wide difference amongst the clergy in terms of theology it was good to note that this has not resulted in the kind of problems that have arisen in other dioceses.

5. Most parishes do not have a vision or strategic plan (or narrative budget) and are wrestling with significant challenges, financial and non-financial, on their own with no apparent resources available and virtually no support. Many parishes want to establish parish-based outreach into their broader community but have no resources to do so. These are challenging opportunities that will require the support of the Stewardship and Financial Development Team.

6. Many parish leaders shared perceptions and experiences of the 'diocese' that indicate a history of parish leadership feeling that "we are on our own". There is a generally perceived lack of support from the diocese that reinforces the 'us' and 'them' attitude combined with a lack of Anglican identity and a growing congregationalism and perceptions that the diocese is living beyond its means. 40% of the study participants indicated the diocese has a 'poor' or 'fair' image and reputation in their parish. Poor communications and issues surrounding the diocesan apportionment simply compound and confirm a negative view of the diocese. It is no wonder that in this context there is such little ownership of the diocese's vision and Shared Ministry Plan because, in part, the diocese's Shared Ministry Plan is experienced for the most part as irrelevant and ineffective in regards to the issues facing parish leaders and to the person in the pew.

7. Although there is apparently very limited 'ownership' of the Shared Ministry Plan, over three-quarters (76%) of the study participants rated the diocese, as a recipient of their parish's giving, as a 'high priority' or 'worthy of support'. 80% of the interviewees 'fully endorse' and 12% 'partially endorse' the goals and plans of the proposed stewardship education program. Interviewees noted it appears to be the right time and context to introduce a parish-based stewardship program because it is seen to be a response from diocesan leadership directly to meet the real needs, concerns and challenges that congregations and parishes are facing now. At the same time many interviewees mentioned how this stewardship initiative must not be experienced as top down or centered at the diocesan office. Another very important signal for the potential success of this initiative is that many of the study participants indicated they would be prepared to work on this stewardship initiative.

8. Virtually every interviewee noted that their parish is seeking to grow and attract young people and families. The number of parishes that appear to have fairly sizeable gatherings of youth and children pleasantly surprised us. This is not a feature that we are seeing in other dioceses so this is a "good news" story. However, we were also surprised by some interviewees from parishes with such membership who were not aware that the diocese has staff positions to support both children and youth ministries. For others, although they were aware of these positions, they had never seen one or both of these staff members.

There is a need to review the mandates for these two staff positions and to encourage a more visible presence in all areas of the diocese.

9. The identification of the need for change and the willingness to change is apparent in particular areas of the diocese. The timing for the stewardship initiative appears to be urgent for finding new ways to address significant challenges. There is a clear need for the diocese to provide guidance, support and resources to those parishes wanting to address change and growth. There are some encouraging stories of parishes facing significant challenges and discovering a new way forward together in the midst of some serious challenges. 79% of the interviewees indicated that their parish's full participation in a parish-based stewardship development initiative is 'very important' or 'important'.

10. There is a diocesan 'culture' that avoids teaching parishioners about holistic stewardship that has led to a focus on fundraising and a far less effective means of fund raising at that. Fifty percent (50%) of study participants stated their parish does not teach proportional giving or tithing and 50% of study participants stated their parish does teach proportionate giving (We have some doubts about the validity of this response.) There is great reluctance to talk about money and there is a pervasive theology of scarcity that is crippling the diocese. This has led unintentionally to a culture and mindset for fundraising in order to fund ministry and mission.

11. The clergy and lay leaders are not sufficiently on board at this time with the Shared Ministry Plan and the development of the stewardship education program to be able to move forward on a diocesan scale but there are 'pockets' and regions where the stewardship initiative could be embraced and engaged successfully.

12. The diocesan interviewees appear to hold fairly strong support (43% of interviewees gave it a 'high' or 'worthy of support') for the work of General Synod and for missions internationally.

13. Approximately two-thirds of the study participants (76%) rated their parish's support for the diocese as either a 'high priority' or 'worthy of support'. The current motivation for giving to the diocese appears to be one of duty and obligation because there is very limited communication and awareness. The people in the pew do not see or experience 'the diocese' in a tangible way and have very little idea what their parish 'gets out' of giving to the diocese and are not convinced of the value of supporting the diocese.

14. The Stewardship and Financial Development Team ought to give consideration to building on the work already done in distributing a diocesan narrative budget to a wider audience than at present by developing a preliminary "Case for Support" document that articulates and describes a clear and basic picture of both the diocese's and General Synod's preferred future, taking into account the input from interviewees in the study. In partnership with the Strategic Planning Group, this document should be prepared to clearly outline the longer term Vision and strategic direction of the diocese and identify and prioritize the urgency for some of the diocese's key or basic components requiring funding support (such as components of the Shared Ministry Plan). Every reasonable effort should be made to articulate the benefits to the parishes of the diocese's vision and goals and respond to the criteria that parishes and individuals are utilizing to determine their level of ownership and support including:

- ◆ *Evidence of a positive reputation;*
- ◆ *Evidence of a strong and positive organizational image;*

- ◆ *Evidence of the importance of the organization and its impact across the diocese or Canada or overseas;*
- ◆ *Evidence of some initial strategic planning;*
- ◆ *Evidence of strong organizational management and the careful marshalling of scarce resources;*
- ◆ *A detailed and convincing description of key goals and objectives;*
- ◆ *Tangible benefits to the parishes;*
- ◆ *If possible, evidence of support from parish and denominational leaders;*
- ◆ *Urgency.*

### **Communications Plan**

15 The consultant team was asked to include some questions about diocesan communications in the interviews. The interviewees all identified communications as a major concern but not in relation to communicating relevant information but in terms of creating *meaningful* communications and genuine concern without any apparent ulterior motive. It would appear to be critical that the diocesan Communications Officer prepare a Communications Plan for promoting the Shared Ministry Plan and be a key part of all communications leading up to Synod 2009.

The majority of the interviewees indicated that they do access the diocesan website for information.

### **Relationships and Identity**

16 The interviewees acknowledged a growing sense that people in the diocese are ready to take action and that now is the time for a clear initiative such as the Shared Ministry Plan. There is a deep appreciation for the Bishop, personally, but an apparent lack of recognition and respect for the Office of Bishop. There appears to have been a determined effort in some regions to develop a greater sense of collegiality along with a fresh commitment to move the diocese forward. It really could be a new day in the diocese if people could see that intentional steps are being taken to develop a strong ministry team and greater openness and understanding of the ‘situation’ in the diocese. It is vital that this ‘new day’ continue to be nurtured and developed. The Shared Ministry Plan and stewardship education initiative offers the diocese and each congregation a ‘vehicle’ and means for experiencing a whole new way of working together, to strengthen an Anglican identity that engages and supports the diocese’s vision and encourages the development of fresh leadership.

17. At the same time we heard stories of this being a divided diocese with ‘disastrous’ Synods that has left a lasting, unfavourable impression and a pervasive level of distrust that inhibits the genuine sense of partnership and openness between parish and diocesan leaders. There appears to be a history of various Standing Committees presenting reports and recommendations to Synod gatherings that are not accepted by the membership and this has resulted in Synods being considered as confrontational.

Part of this problem, we suggest, lies in the current membership structure of the Diocesan Synod. It is our understanding that each parish has three elected members to Synod plus the parish priest and that all retired clergy are full members of Synod. Synod is too large to be effective where 3 members representing a very small parish has the same representation as the larger parishes. Similarly, providing retired clergy with full voice and vote at Synods can lead to a situation where the retired clergy have a greater influence at Synod compared to active clergy and where conceivably at some time in the future it could be the retired clergy who influence the election of a Diocesan Bishop.

The situations outlined above are governance issues that need to be addressed and we suggest changed at the earliest possible opportunity to provide a more reasonable representative body to comprise Synod membership.

In reducing the number of overall members of Synod there could be a more proportional representative system whereby each parish would have a minimum number of representatives with the possibility of increasing the number of members, to a maximum number, based on the size of the parish, perhaps based on the number of parishioners on a parish roll or Average Sunday attendance. There are many variations that can be considered but we do believe that the present system is simply not effective and requires change.

In the case of retired clergy it is important not to lose the wisdom and experience of these priests but allowing full voice and vote at Synod may not be the most appropriate way to benefit from this experience. Consideration could be given to establishing a policy that would indicate that all clergy retiring from active duty after, say 1<sup>st</sup> June 2009 would not have membership privileges at future Synods – those who retired before that date could be grandfathered. However, there will be times when it will be useful to Diocesan leaders to receive input from retired clergy on particular issues and there is no reason why this cannot be obtained from appropriate gatherings of the retired clergy.

18 There is the need for a sustained high-level personal interface with parish leaders in order to build a new level of trust and partnership. This must be central to any initiative for healthy congregations and for a successful stewardship initiative. Although the diocesan management is sound, it will take considerable time and intentional relationship building with parish leaders before people across the diocese fully trust any new initiative.

It is certain ‘behaviour’ coming out of the Diocesan Office that must be reviewed intentionally from the standpoint and question, “Does the tone of this communication promote our unity?” “Is there any unintentional element of top down communication?” A number of study participants reported deep concerns about the ‘cold’ style of letter communications or how telephone calls to the Diocesan Office are often not responded to in a timely manner. These occurrences are having a huge impact on diocesan relations.

The experience and perception of the Diocesan Office is that it can simply direct its funds at will without any accountability or report to parishes. Experiences like the ones mentioned above simply reinforce negative perceptions no matter what the Bishop says. In fact it was apparent that many interviewees did separate the negative comments about the diocesan office from any direct

reference or connection to the Bishop. There must be an immediate organizational alignment with the pastoral and organizational ‘values’ of the Bishop and there must be a change in the ‘top-down’ communications stance as soon as possible. This is not working or bringing the kind of relationship that is desired.

19 Parishes seem to be able to ‘get away’ with not paying their fair share to the diocese without any consequences – this may not be true but this is the perception. We have some additional comments on this particular point later in this report. Parish leaders tend not to recognize or acknowledge any benefits to their parish in paying the diocesan apportionment. The clergy are the primary interface to the parish and need some very basic tangible ‘tools’ and resources to help their parish see a meaningful connection to the diocese.

20. There is a history of resistance to most any program originated from the Diocesan Office. Clergy and lay leaders were emphatic that the proposed stewardship initiative must be based at either the regional or parish level if it is to have any chance of success.

21. According to the study’s findings, the majority of parishes have no clear sense of the value of what it means to belong to the diocese (and General Synod). The diversity of the rural/urban areas makes this even more challenging. Most interviewees feel that their parish is basically on its own and that they have no real voice as to what happens at Synod. Parishes are working on their own to find the resources they need to develop their future and grow. There is a significant gap and lack of connectedness and understanding between parishes and ‘the diocese’ that creates a strong sense of separation and suspicion.

22. The Bishop and the diocesan apportionment are viewed as the only real connection between ‘the diocese’ and the parish. Interviewees indicated that the deanery structure carries no value or importance to their parish other than perhaps the clergy through the meetings of Deanery Clericus. Any relationships with other parishes in the deanery have come about through ad hoc means or an invitation to participate in a shared event. Few lay interviewees expressed any clear understanding of the role or function of the Archdeacons or Regional Deans.

23. Interviewees indicated that their parishes would place value on the sharing of ideas and resources with each other.

### **Leadership, Ministry and Management**

24. The Bishop appears to be quite prepared to do what it will take to initiate changes to the diocese’s administration and organization in order to ensure that the diocese stays the course for realizing its goals and objectives as outlined in the Shared Ministry Plan. At the same time some key clergy and lay leaders perceive that there is a lack of a coordinated plan in the way the Bishops’ and Archdeacons work together with parishes. They believe this is impeding any momentum and creating a lack of transparency and understanding in the direction and process the Bishop wants to move the diocese forward. It creates suspicion. Diocesan leaders also see the lack of an integrated and coordinated diocesan committee and planning structure. There appears to be far too many committees moving in too many directions. The Diocesan Shared Ministry

Task Force will need to be allowed to offer some recommendations in this regard. These observations are part of the reason that we have suggested that a full evaluation of the Diocese in terms of governance, structures and system be undertaken at the earliest possible time. The recommendations of this study are intended to provide the Bishop and Diocesan Executive with the mandate to move forward boldly and imaginatively in establishing a task force that will get things done.

25. The Study findings indicate that most leaders within the diocese share a deep concern for the future of the diocese but are skeptical about their ability (a sense of powerlessness) to influence the level of genuine change that they perceive is needed in relation to the magnitude of 'the situation'. There are very capable lay leaders throughout the diocese that serve on diocesan committees. These kind of internal challenges do not encourage the diocese's finest leaders to volunteer their time and expertise. It leads to discouragement and negativity. There needs to be more intentionality given to the empowering of lay leaders in the exercising of their gifts of leadership.

26. The diocese has a number of very respected leaders with acknowledged expertise that will be vital to the success of the Shared Ministry Plan and the proposed stewardship education initiative. The Stewardship and Financial Development Team's ability to mount a successful stewardship education initiative will be based on the recruitment of volunteer leadership. The results of the Study were very encouraging and indicated that appropriate volunteer leadership could be recruited to assist in the various areas of the diocese. Therefore, at the very earliest stages of the planning and preparation, the Stewardship and Financial Development Team should focus its efforts on enlisting the strongest possible lay and clergy leadership within specific regions of the diocese. Again, it is important that the organizing and implementing be experienced as a grassroots initiative.

27. A diocese of this size ought to have staff and resource person(s) available to parishes. The diocese has attempted in the past to hire a full-time staff person in the area of stewardship but Synod did not approve this course of action. From the consultant team's perspective, it would appear critical to have a full-time staff person knowledgeable in stewardship and congregational development.

There are also a few clergy with acknowledged expertise, interest and experience and they ought to be called upon to assist with the development of the diocese's stewardship education initiative by leading one of the proposed sub-task groups.

28. Lay leaders and clergy hold the Bishop in the greatest respect but there are indications the Bishop is frankly not being told the full extent of 'the situation' and there is a subsequent perception within clergy and lay people that 'the diocese' is not listening to their concerns and that the Bishop needs to provide stronger oversight and leadership accountability. There are a growing number of negative perceptions that the diocese is moving far too slowly in addressing non-viable parishes or that clergy are not being held accountable. Study participants emphasized that the diocese must 'deliver' on the Shared Ministry Plan at the earliest possible time along with the stewardship education initiative.

29. 80% of the interviewees indicated that the stewardship education initiative is 'very important' to their own parish's future.

30. At this point approximately only 12% of the parishes in the study indicated that they are developing a stewardship committee or a stewardship plan that means that 88% do not have a stewardship plan or a committee. Consideration needs to be given to the value of having parish stewardship officers who become members of their parish corporation.

31. The interviewees indicated that they have very little sense of how the diocese is actually organized. For example, there is apparently no organizational chart that would indicate the relationship between staff and the various committees and Synod and the corresponding lines of responsibility and authority do not appear to be clear at all. This situation needs to be reviewed by the *Diocesan Shared Ministry Plan Task Group* for consideration of the appropriate action. The position descriptions for staff, archdeacons and regional deans appear to be loosely organized. However some excellent work has been done on the Terms of Reference for the various committees. The 'lines' of responsibility/authority between the role of the Regional Deans and Archdeacons is viewed as very 'blurred'.

32. The organizational writer Peter Druecker suggests that an organization's mission is reflected by what they measure. Whatever the diocese measures reflects the true mission. Currently the valued measurements would indicate that the diocese's real business is creating financial viability. Is it time to re-structure the diocese's measurements to being more in terms of church health or growth? Such measurements might include the number of new families/individuals that have visited the congregation and the number that have joined the congregation or the kind of parish outreach initiatives and the numbers of people involved in those ministries.

33. The diocese is blessed with a few experienced leaders and professionals who are experienced in group process, visioning, strategic planning and organizational process. A number of these leaders are already giving leadership in their parishes. During the course of the interviews, interviewees were asked if they would consider giving leadership to a regionally based stewardship initiative either at the parish or deanery level. The vast majority were willing to consider being involved in giving leadership and many were passionate about their participation. There is every indication of their willingness to give leadership provided they were asked by the right person and in the right way and given the appropriate support and resources.

34. There is need for the Bishop's Counsel (Bishop, Dean and Archdeacons) to become more proactive in addressing ministry concerns, open incumbencies and other parish concerns on the ground and at the grass roots level.

35. There are people in the diocese that are passionate about the ministry undertaken at the diocesan camps and provide many volunteer hours to ensure that these camps run well. However, there are others who are quite concerned about the overall financial situation of the camps and the ongoing needs. For example, it is our understanding that the Camp Debt is currently approx. \$514,000 with \$100,000 owing to The Anglican Foundation and the rest to the diocese. Some people are concerned when they understand that further funds will be needed to complete

required renovations and that the diocese may be considering a further capital campaign of some kind to deal with the current debt and future needs. We believe that there is a degree of donor fatigue in relation to the camps.

36. Some people have indicated that the diocese is asking for more money from the parishes all the time through the current assessment and apportionment system. We have reviewed diocesan financial information and find that the statistics do not support this opinion.

Here are some basic facts that we were able to access:

In 1996 the effective rate, based on the combined request from the parishes for assessment and apportionment was 19.2%

In 2006, the last year for which we were able to access figures the rate for the same purposes was 17.1%.

In 1996 total parish income was \$ 7,348,000 and in 2006 it was \$ 10,137,000, an increase of 37.9% over this ten-year period.

In 1996 the amount requested by the diocese from the parishes was \$ 1,411,000 and in 2006 \$1,740,000 an increase of 23.3% over this ten-year period.

These statistics would appear to support a statement that, in fact, the parishes are retaining a greater percentage of their income at the local level compared to ten years ago and it is the diocese that is attempting to work with less. Perhaps this is a message that needs to be conveyed to the members at the parish level.

37. We decided to take a look at the diocesan gift to General Synod based on the Proportional Gifts to General Synod process that was agreed to by all dioceses at the meeting of General Synod in 1998. At that meeting of General Synod it was agreed that dioceses would support the ministry of General Synod through the provision of a Proportional Gift that was to be based on 26% of diocesan income, the definition of “diocesan income” being agreed to on a uniform basis by the dioceses. At that time it was realized that some dioceses were already contributing at a level of more than 26% and it was suggested that those dioceses continue to contribute at the higher level for a period of 5 years to allow those dioceses that were contributing less than 26% to move up to that level over a 5 year period.

In looking at the diocesan Proportional Gift to General Synod for 2008 we noted that the diocesan income, as per the agreed upon basis for 2006 (the year to be used for the 2008 actual gift) was \$1,687,500. At the rate of 26% (the agreed upon rate as noted above) the diocesan fair share gift to General Synod for 2008 would be \$ 438,749 whereas the actual amount (as per the diocesan 2008 budget) will be \$ 314,210 or 18.6% of diocesan income.

As far as we can tell this gift of \$ 314,210 has been at the same amount for about the past 8 years whereas diocesan income has been increasing so that in effect the percentage figure of this gift in relation to diocesan income has been reducing over this 8-year period.

Some dioceses that have found themselves in a similar position have taken the step of gradually increasing the percentage level each year until they have reached the target level of 26%. In your case you might consider a modest increase in 2009 to a figure based on 19.0% of diocesan income and then agree to increase it by 1% per year until reaching the 26% level. In the same way that a fair share system exists so that parishes pay their fair share to support a diocese so, in turn, it is reasonable to expect all dioceses to accept their fair share to support the wider church – this is part of what it means to be within the Anglican Communion.

Again, we mention this fact here because we suspect that most people across the diocese will be unaware of these facts and it is another aspect of diocesan life that needs to be effectively communicated to diocesan members.

38. We are aware that The Report of the Budget Funding Task Force (as approved by Diocesan Council) dated April 11<sup>th</sup> 2007 was presented to the 2007 Diocesan Synod but was not approved. The fact that Synod did not approve a report that had been developed by knowledgeable people and approved by Diocesan Council refers us back to the “confrontational” aspects of some Synod gatherings. We decided to review the Budget Funding Task Force in detail recognizing that we have some experience in assisting dioceses develop appropriate systems to meet current conditions.

In general we found ourselves to be in basic agreement with the recommendations outlined in the report and fully supported the key values and principals outlined on page 3. There are a number of minor changes that we feel could be considered. We can understand the rationale for not suggesting that the system outlined in the report be deemed to be “mandatory” but we feel that this would be a preferred way to go, perhaps after the initial 3-year phase-in period. It is our experience that parish members will accept a mandatory system for a fair share system provided that the system is fair and equitable. It is when parishioners see some parishes not contributing their fair share and no action taken by diocesan leaders to see that this is done that resentment begins to build. Parishes that are then paying their fair share begin to wonder what the benefit for doing so might be. The process for ensuring that a parish pays its fair share in a mandatory system does not mean that “punitive” steps have to be taken with a parish that may be experiencing some difficulty in making its fair share contribution but rather that a pastoral approach be taken.

***The consultants would be pleased to provide some ongoing support to the group that is mandated to bringing a revised proposal to the 2009 Synod.***

We also feel obliged to make comments about the 10-10-10 plan that we understand was introduced at the last Synod and we have reviewed the material presented at that time. We would happily agree that a FULL implementation of this plan would solve many problems. It was noticeable that the proposal to Synod indicated that during the suggested phase-in period the drop in diocesan income could be covered by reducing the Proportional Gift to General Synod – we simply refer to the previous paragraph in relation to this suggestion.

It is our understanding that Bishop Salmon in his presentations to the most recent Clergy Conference indicated that in considering this proposed 10-10-10 plan the place to begin is at the parish level with individual parishioners. It is only when this first piece is in place that one can move on to the other two levels, a position that we fully support.

39. We heard several times in our interviews references made to “that Fredericton diocese” that indicated that some people see “Fredericton” as being something separate from their ministry at their parish level. We then wondered why this is the Diocese of Fredericton rather than the Diocese of New Brunswick as all the parishes are based within the Provincial boundaries. It is our understanding that there was an attempt to make this change several years but Synod did not support the recommendation. We do believe that if such a change were possible it would assist in removing this feeling of “resentment” towards Fredericton. Perhaps it would be appropriate to re-visit this possibility again.

40. Many interviewees expressed the opinion that the diocese has too many church buildings or that existing buildings are in the wrong location when considering current circumstances. This is a situation that we see in every diocese and some dioceses have been able to develop a plan to deal with such situations whereas others continue to ignore the situation. We were conscious during our interviews that there are some locations where realistically it makes no sense to maintain a particular building yet the church building probably represents the remaining sense of hope for that particular community. In these cases it seems to us that somehow there needs to be a way to transform these buildings into community based centres rather than simply church buildings because in many ways that is what they already are.

Several dioceses have turned to outside help to assist them with the challenge of too many buildings and locations. It is very difficult for people within a diocese to accept the views of other people within the diocese. Therefore dioceses have contracted with Myrlene Boken of AMB Research to assist them in this kind of evaluation. AMB Research undertakes a review of every church building that exists within a diocese as well as locations where the Anglican Church is not represented but probably should be. This review takes into consideration demographic studies and every parish priest is interviewed as part of this process. We are aware that AMB has been hired and produced reports for the dioceses of Ontario, Ottawa, Huron, Calgary, Toronto and Niagara. It is also our understanding that the Diocese of Montreal is currently negotiating with AMB to conduct a survey in that diocese. If diocesan leaders feel that there is any merit in considering this possibility Ms. Boken may be reached at 705-456-4133 for an initial conversation and, of course, it would be prudent to check with leaders in the dioceses mentioned above to get an impression of whether they feel that the AMB reports have been beneficial to them.

### **Anticipated level of Support**

41. There is good support indicated for the plan to establish healthy congregations and a biblically based stewardship education program and there is sufficient committed leadership available to promote the Shared Ministry Plan and a successful stewardship education initiative. On the whole there are enough positive factors indicated through the study interviews and focus groups that the LDTN Team is led to believe that there is fair potential for success provided the Shared Ministry Plan and the stewardship education initiative establishes a strong foundational base.

The LDTN team is recommending that the stewardship education initiative be regionally based and implemented as pilot projects within two regions in the first year. Consideration should be given to increasing the participating regions each year over the subsequent two years.

42. Overall, there is very little understanding and visualizing of the spiritual and financial benefits of an effective regionally based stewardship plan. Interviewees expressed their deepest concerns and hopes that a stewardship education initiative would model the right balances within faithful Christian stewardship.

43. Of the 42 interviewees who responded to a question about whether their parish teaches proportional giving or tithing, approximately 50% stated 'yes' and 50% stated 'no'. Interviewees indicated there is absolutely minimal education about tithing or proportional giving or the reasons/theology for giving. There are even indications that some parishes are beginning to use fund raising events as the primary way to meet operational shortfalls. This is a great concern as it begins to mark a very definite decline in focus from biblical stewardship to fundraising. A good number of parish leaders appear to be more motivated by the short-term gains and immediate success of fund raising. They seem to judge the effectiveness and benefits of stewardship by the financial results alone.

44. Study participants indicated that their parishes generally do not have enough money for their own ministry and outreach and by having to pay apportionment they perceive the diocese as working 'against us'.

45. Study participants acknowledged the huge, untapped potential of financial resources within some segments of the diocese for funding parish, diocesan and national ministries and mission. There needs to be recognition of the need for strategies to be developed for connecting with key givers at the earliest opportunity as a component of diocesan renewal. The diocese needs to prepare an integrated development plan as soon as possible for growth in financial stewardship, the funding of special projects and the development of special diocesan endowments. It is in the diocese's best interests to ensure an appropriate level of staffing or consultant support for this plan.

46. There have been minimal efforts throughout the diocese to develop an intentional gift-planning program. However, a presentation by Charles O'Neil, the gift-planning consultant in the Diocese of Nova Scotia and PEI to the Diocesan Executive earlier in 2008 was well received by some members. We believe that the diocese has tremendous potential in the area of gift planning as one component of the stewardship education initiative and the diocese's strategic direction. The LDTN Team recommends that once the stewardship education plan is finalized that clearly defined objectives and benchmarks for a gift-planning program be developed.

# PROPOSED STEWARDSHIP INITIATIVE

## Marks of an Effective Diocesan Stewardship Education Program

### **1. Relationships of Trust and Integrity between Parish leaders, Diocesan leaders and General Synod leadership**

### **2. A Compelling, Inspiring and Faithful Vision and Strategic Direction**

A Positive Image and Identity

A Priority Vision

A strong consensus in support of the needs

### **3. A Passion for Discipleship and Stewardship Education**

### **4. A Doable Plan**

A logical but most importantly 'spirit-driven' plan containing measurable goals and associated time-lines must be formulated for the project. The project, plan and needs must be accepted by and communicated to the constituencies of the diocese

### **5. Strong and Enthusiastic Governing Bodies and Leaders**

A clear understanding of who is taking overall responsibility for the plan and its implementation

Diocesan leaders are dedicated to the vision and willing to support generously with their time and energy

The Bishop provides top-level leadership

Project leaders are willing to commit themselves for the duration of the project

### **6. An Adequate Infrastructure**

There are sufficient financial and staff resources to ensure that intentional strategy is implemented, and leaders are properly enlisted, trained and supported throughout the project's process

A reporting system within the archdeaconries or regions and Synod Office that will keep the process on track

### **7. A Sense of Urgency**

A pervasive feeling must exist, or be developed, that this project is important and must be undertaken and completed now

### **8. Cost-Effective**

The project expense is justifiable

The role and mandate of the *Stewardship and Financial Development Team* (SFDT) will likely need to be reviewed and revised in order to meet the requirements and plan as articulated by *The Diocesan Sharing Ministry Task Group* (DSMTG). It may be necessary to form some new major sub-task forces to begin to develop fresh resources for parish use at the earliest direction of the Diocesan Sharing Ministry Task Group. These task forces could be a Stewardship Education Task Force and a Parish Leadership Training Task Force.

In order to ensure that the appropriate level of leadership, coordination and priority be given to the implementation of the Shared Ministry Plan including the stewardship education program work and timeline, it will be vital that the Chair of the Diocesan Sharing Ministry Plan Task Group and the Chair of the Stewardship and Financial Development Team are ongoing members of the Diocesan Council, or at least be present at meetings of the Diocesan Council if existing regulations do not permit full membership at this stage.

It is important to note that no plan can guarantee success. The potential for success will increase substantially if the components outlined in the following pages are adhered to:

- a) the Bishop and office staff make the appropriate adaptive changes to the governance and infrastructure to improve effectiveness in the facilitating and communication of diocesan decisions and the Shared Ministry Plan including the stewardship education initiative (the Bishop's top level involvement and public leadership will be critical);
- b) the Diocesan Sharing Ministry Plan Task Group takes time to jointly work through the questions/issues raised in this study including the Shared Ministry Plan, identity/governance and other key issues of importance raised in the Study and develop core strategies that ensure the appropriate linkage is made to the integration of the Struggling and Rural Parishes Task Force, the Budget Funding Task Force and the stewardship education initiative;
- c) addressing the question of appropriate, equitable financial support for the common ministry and mission of the diocese (fair share);
- d) the development or strengthening of a collaborative spirit among the clergy and parishes including a nurturing and understanding of a diocesan identity;
- e) a plan for connecting with the clergy and lay leaders of the parishes so that they are the grass root advocates of the Shared Ministry Plan and the stewardship education initiative;
- f) a Shared Ministry Plan and stewardship education initiative that is a parish-based approach that encourages parishes to discern their entry point and provides resources, guidance and a shared commitment to becoming the finest parish possible;
- g) a diocesan Case for Support is developed that is seen as clear, compelling and urgent;
- h) the development of an internal (diocesan staff/committees) and external (parishes/ public) Communications Plan for the entire diocese; and
- i) a recommended critical path is finalized and then covenanted with Diocesan Council and clergy and wardens.

## **Proposed Critical Path and Timeline for the Stewardship and Financial Development Team**

It would be ideal if all regions could participate in the proposed stewardship education initiative now but the findings of the study indicate that the regions are not at the same level of readiness and therefore many congregations will need time to get ready in their region. According to study participants the program or initiative will likely work best if it is regionally based. This calls for a very different emphasis or plan than if it was diocesan-based. The interviewees and focus group participants were also clear that one 'package' would not serve every parish. For example, some congregations will be looking for assistance with how to grow or how to shift the mindset of their congregation towards Biblical stewardship or how to develop strong leaders or develop a year-round stewardship education process whereas others will be seeking ways to see a marked increase in financial contributions over say the next three years and still others will be seeking ways to move from a fund-raising understanding of stewardship to a faith-based understanding.

The following are some potential areas for training modules:

- How to grow the congregation and bring in youth and young families
- How to be more active on the mission/outreach front
- How to develop a mission and vision statement
- How to develop a strategic plan with goals and strategies
- How to develop a two-year budget
- How to create a vibrant and healthy congregation
- How to build community through communications
- How to communicate the vision, goals and strategies
- How to develop a narrative budget
- How to do budget preparation
- How to start an endowment fund
- How to do church renovations
- How to prepare for a capital campaign
- How to do a stewardship emphasis without it being all about money
- How to increase the income level of our parish
- How to pay off the mortgage
- How to create a year-round stewardship plan
- How can parishes work together
- How to reach out to a growing community
- How to provide Planned Giving sessions
- How do you reach out to people in this day and age
- How to prepare a Sunday school curriculum
- How to connect spiritual gifts and talent inventory to people doing ministry
- How to support and guide new leaders and new wardens
- How to produce print resources/video of what your parish is hoping to accomplish
- How to manage cash flow control through the whole year

**Regardless of what a parish does, the following would be considered a basic foundation for each and every parish:**

- a. A clearly articulated action plan(s) or strategic direction or vision**
- b. A regular and intentional parish focus on “growing parishioners as God’s stewards” through programs to educate, improve awareness, and encourage the proper use of all God’s gifts**
- c. An annual narrative budget**
- d. An "annual financial stewardship emphasis" of some kind**
- e. A Pre-Authorized Giving program**
- f. An education process for gift planning**

A final determination of the plan and timing of the stewardship education program will ultimately depend upon the Stewardship and Financial Development Team’s ability to organize the infrastructure, finalize the stewardship education program, select regions for participation, implement a communications plan and produce support materials.

What follows is an ambitious timeline that will need to be finalized and fine-tuned after further planning with the Diocesan Sharing Ministry Task Group and the Stewardship and Financial Development Team.

The critical path takes into account the following guidelines or parameters:

1. The stewardship education program must be designed to fit the characteristics and context of the individual region and its parishes.
2. Building ownership of the stewardship education program within the diocesan clergy and parish leaders is now absolutely essential to ensure understanding and strong support.
3. The preparations for approving and implementing the stewardship education program will require the highest level of priority in terms of energy, time and finances.
4. The stewardship education program should ensure the development of a diocesan stewardship theology and must also clearly organize and train leaders and workers in what it takes to implement an effective regionally based initiative.
5. The importance of developing an excellent Communications Plan, producing quality presentations and providing excellent materials is absolutely vital.
6. There must be adequate administrative and communications staff support.
7. Bishop Claude ought to give high-level leadership to the stewardship education program and be the official spokesperson for all decisions and announcements.
8. In partnership with diocesan leaders, the national consultant team will provide direction in:
  - Program management
  - Assist in the preparation of promotional and training materials

- Assist with conducting seminars and training workshops
- Volunteer training
- Program communication
- Consultation and general assistance to diocesan leadership

9. The critical value of the Regional Deans (and Archdeacons and additional clergy/high profile lay leaders) agreeing to give leadership by:

- Giving top level leadership and priority to the Shared Ministry Plan including the stewardship education program – engaging and energizing clergy and parishes in their region
- Representing the Bishop
- Facilitating all key meetings
- Ensuring parish covenants receive the appropriate support
- Communicating the stewardship education program to all their parishes
- Dealing with obstacles/problems

10. Each participating parish will appoint Stewardship Officers (parish leaders) to sit as members of Parish Council and to conduct their parish's participation in the stewardship education program with the strong support and leadership of their clergy.

11. The entire regionally based stewardship education program should be designed on the principles of Christian stewardship and all educational and training materials should reflect these principles in spirit and action. A healthy level of accountability via covenanting will be reflected in all decision-making and organization.

The critical path also takes into account the following ten draft goals:

- a. Develop a doable and affordable stewardship education program that establishes a unique, usable, replicable, sustainable program that can be tailored to each parish's special circumstances in the region in order that the parishes receive the full spiritual and financial benefits of an effective, stewardship program (including a clear strategic plan/direction).
- b. Review and address the findings and recommendations of the study.
- c. Establish the full endorsement of the stewardship education program by the Diocesan Executive, the clergy and parish lay leaders following the appropriate consultation and input.
- d. Recruit high profile, faithful lay and clergy leadership who will provide both the organizational and spiritual leadership.
- e. Establish an open, accessible, transparent, permission-giving organizational structure and process that sets attainable milestones and nurtures a passion for stewardship and the diocesan-wide Shared Ministry Plan.
- f. Strengthen or develop the commitment in the parishes to stewardship in all its facets and build the relational network within the regions and the diocese.
- g. Conduct a stewardship education program that is inclusive and builds consensus among all Anglicans in the diocese.

- h. Increase the profile/identity of the diocese as a compassionate, sharing and justice-oriented community of Anglicans.
- i. Increase the level of financial support to the parish, diocese and General Synod.
- j. Develop a case for support and financial development plan for funding the diocese's continuing mission and ministry initiatives including church planting and diocesan endowments. (the ministry of Planned Giving)

The critical path and timeline to achieve the goals will move through three phases of activity:

## **I. PREPARATIONS PHASE (Four Months)**

Major preparations for the launch of the stewardship education initiative are outlined as a key component of the integrated report to Synod 2009 by the Diocesan Sharing Ministry Task Group, The Struggling and Rural Parishes Task Force, the Budget Funding Task Force and the Stewardship Financial Development Team. During this preparations phase it will be important to ensure that the diocese is prepared for the launch with timing to be determined. The Preparations Phase ensures that the organizational structure is in place, communications materials are developed, organizational processes are in place and that obstacles or issues identified in the study that could potentially harm the stewardship education program are in process of being addressed prior to the launch.

The five foundational issues to be addressed during the Preparations Phase are:

- Addressing of the issues and recommendations from the study and the integrated plan that will have been developed by the Diocesan Shared Ministry Task Group in a shared presentation to Synod 2009 by the Struggling and Rural Parishes Task Force and the Budget Funding Task Force
- The organizing of the Stewardship and Financial Development Team and development of the organizational infrastructure
- The production of a core document that outlines the proposed stewardship education program in greater detail
- A feasible, working plan for getting the input and endorsement of Diocesan Council, clergy and lay leaders
- Begin preparations for the launch

### **Preparation Phase Details:**

- Presentation of the study report to the Bishop first and then the Bishop's Counsel (Bishop, Dean and Archdeacons) for their input and key recommendations leading to the appointment of the Diocesan Sharing Ministry Task Group
- Presentation of an interim or preliminary report to Diocesan Council with an outline of initial steps including the date and time for a full presentation of the integrated report to Synod 2009
- Presentation of the Diocesan Sharing Ministry Task Group recommendations to the Stewardship and Financial Development Team for input, recommendations and setting of next steps leading up to the joint presentation at Synod 2009

- The Chair of the Stewardship and Financial Development Team moves to recruit additional members as required with the support of the Bishop
- The Diocesan Sharing Ministry Task Group and Stewardship and Financial Development Team review/revise the stewardship education program plan and timeline and oversee the coordination of the Preparations Phase and the Consultation Phase
- The Diocesan Sharing Ministry Task Group and Stewardship and Financial Development Team assigns the writing and production of the core stewardship education initiative document
- Communications plan is developed
- Finalize plan for presentation and consultation to diocesan clergy and lay leaders
- Discussion of initial strategies for implementing the stewardship education program (regionally-based)
- Final approval given to core stewardship document
- Question & Answer document produced
- Circulation of core stewardship document
- Presentations developed for Diocesan Council and clergy
- Position descriptions prepared for all leaders
- Orientation and training of the Stewardship and Financial Development Team

It should be noted that the following action items, proposed dates and noted responsible groups are recorded in the following tables for guidance only at this stage. The suggestions should be regarded as a “discussion stimulant” and it is a work in progress that will be amended in the coming months.

References are made to The Diocesan Sharing Ministry Task Group – this is based on the assumption that the Diocesan Executive will accept the recommendation that such a group be established – should that not be the case alternative responsibilities will arise.

*Post draft editor’s note: At the time the creation of the first draft, the proposed timeline for the stewardship initiative would begin in late November 2008 with the “Preparation Phase” beginning in early 2009. Upon further reflection by the Consultants, it was recommended that these specific dates indeed need to be recalculated. The start of the “Preparations Phase and that which follows will need to be determined as the early planning pieces begin to come together. Specific dates in the timeline as presented in the initial draft now “to be determined,” have been removed here. Decisions will be made about the timing of the proposed phases as soon as possible. The Diocesan Executive established the Sharing Ministry Task Group at a meeting held 11 December 2009.*

<b>Activity Timeline:</b>	<b>Date:</b>	<b>Responsible:</b>
<b>Presentation of the study report to the Bishop first and then to a meeting of all the Archdeacons and Dean</b>	<b>November 24<sup>th</sup> 2008</b>	<b>Consultant Team</b>

<b>Presentation of the study report to the Stewardship and Financial Development Team</b> to review recommendations, proposed plan, critical path and timeline and prepare presentation to Diocesan Council	<b>November 25<sup>th</sup> 2008</b>	<b>Consultant Team</b>
<b>Presentation of the study report recommendations to members of Diocesan Executive</b> and approval given to appoint a Diocesan Sharing Ministry Task Group to oversee the development and presentation of the final integrated plan to Synod 2009	<b>December 2009</b>	<b>Bishop and Archdeacons and Dean</b>
<b>First meeting of the newly appointed Diocesan Sharing Ministry Task Group</b> Chair and Deputy Chair with the Bishop	<b>January 13<sup>th</sup> 2009</b>	<b>Bishop</b>
<b>Presentation to Diocesan Council</b> of preliminary and initial findings and recommendations and review of study with proposed recommendations for approval including budget and staffing plan	<b>January 17<sup>th</sup> 2009</b>	<b>Bishop/SMTG Chair and SFDT Chair</b>
<b>Meet with Archdeacons/Regional Deans (and Bishop)</b> to discuss/consult on Shared Ministry Plan, the stewardship education plan, timeline, strategic leadership role, and communications.		<b>Bishop/ SMTF Chair and SFDT Chair</b>
<b>Materials (core document and Q &amp; A ) for use in consultation</b> phase finalized by DSMPTF/SFDT and circulated by mail or email to clergy and Diocesan Council; invitation to Clergy Consultation Day		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Review and finalize strategy for arranging consultations</b> (clergy, archdeacons, regional deans, diocesan committee chairs, key influencers from study)		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Meeting of SMTG and SFDT and Diocesan Council</b> to review draft plan, timeline, project consultant support, plan for consulting with clergy and diocesan leaders, draft communications plan and organization of SFDT, organizational infrastructure and agreement with national office		<b>Bishop/ SMTG Chair and SFDT Chair</b>

## II. CONSULTATION PHASE (Four Months)

The consultations will include one-on-one conversations (or small groups) with some key clergy and lay leaders within important diocesan constituencies, a meeting with Archdeacons/Regional Deans and a meeting with Clergy. All aspects of the Shared Ministry Plan and the stewardship education plan will be discussed and tested.

This phase recognizes three major requirements for a successful implementation of the Shared Ministry Plan and the stewardship education program:

- 1) Clergy and lay leaders' participation and advice must be sought in matters that are important to them.
- 2) The diocesan community must be able to see the consequences of its action and how its action, taken at Diocesan Council, through this study and the work of the Diocesan Sharing Ministry Task Group achieved the results or consequences as outlined in the overall plan and activity timeline.
- 3) Participation must offer leaders the opportunity to make a difference - to identify themselves as program leaders willing to serve the Shared Ministry Plan including the stewardship education plan or be a leader/resource person.

<b>Activity Timeline:</b>	<b>Date:</b>	<b>Responsible:</b>
<b>Mailing to all clergy</b> re. attending the Clergy Consultation		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Diocesan Sharing Ministry Task Group and SFDT Meeting:</b> Review plans for consultations, communications plan, draft materials and review agenda for launching in early 2009		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Diocesan Council</b> approves the presentation to Synod being made by The Diocesan Sharing Ministry Task Group, the Struggling and Rural Parishes Task Force and the Budget Funding Task Force including recommendations and three-year stewardship education plan and staffing plan and budget and three-year partnership with national office		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Clergy Day Consultation</b>		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Key Milestone:</b> Full attendance of the clergy at the Clergy Consultation Day		
<b>Diocesan Sharing Ministry Task Group and SFDT Meeting:</b> Review critical path, results of Clergy Day, presentation to Diocesan Council and plans for Regional Meetings in June and July and materials for stewardship education implementation		<b>Bishop/ SMTG Chair and SFDT Chair</b>
<b>Prepare presentation to Synod</b>		<b>SMTG /SFDT</b>

#### **Consultation Phase Details**

- Finalize the stewardship education plan and timeline
- Finalize the Communications Plan
- Identify people and prepare agenda/materials to be used in the consultations

- Conduct and complete consultations
- Report on consultations to Diocesan Council
- Prepare for Clergy Day Consultation
- Finalize and approve presentation materials/agenda for September launch
- Confirmation of dates for Regional Meetings in June and July
- Training materials for stewardship education program provided by sub-task groups
- Confirmation of First Stewardship Training Modules

### **III. IMPLEMENTATION PHASE (10 Months)**

The official launching of the stewardship education program will be planned for the Synod in June provided the Diocesan Synod approves the entire Shared Ministry Plan including the stewardship education plan. The presentation will be made by the Bishop and the Chairs of the Diocesan Sharing Ministry Task Group and the Stewardship and Financial Development Team Chair and the Chairs of the Budget Funding Task Force and the Struggling and Rural Parishes Task Force. This major presentation would include a brief, initial overview of the why, what, how and when of the stewardship education program (and three-year action plan) plus provide a handout informational document/DVD/video that could be used at the Parish Council level for their preparation and response. A more detailed presentation of the entire stewardship education initiative will be made to key parish leadership through the regional meetings as below in June and July. These meetings will engage parish leaders in a more comprehensive overview, dialogue and consultation about their potential participation keeping in mind that the process must establish this as a ‘grass-roots’ driven initiative.

At regional meetings of Clergy, Wardens, Parish Treasurers and Synod Delegates, each parish will receive a detailed orientation to the stewardship education plan that will include an overview of the results of the Diocesan Sharing Ministry Task Group’s work, the plan and timeline, a ‘menu’ for parish participation, the covenanting process, immediate organizational tasks, receive all materials and clarify dates for the training modules.

Following the regional meetings, a typical parish process for entering into the stewardship education program would include:

- A verbal indication of interest to the Bishop or Archdeacons or Regional Deans
- Appointment of two parish leaders (Stewardship Officers) who would sit on Parish Council
- A written application from the Regional Dean and Parish Councils to the Bishop
- A survey or study conducted as needed or appropriate in order to assess parish readiness
- A covenant outlining the goals and objectives the parish leaders are setting for their full engagement in a regionally-based stewardship education program
- Willingness to monitor the parish’s progress and meet timelines

<b>Activity Timeline:</b>	<b>Date:</b>	<b>Responsible:</b>
<b>Handout re. Regional Meetings</b> to all Clergy, Wardens, Synod Delegates, Treasurers, Stewardship Coordinators		SFDT
<b>Stewardship Financial Development Team Meeting</b> – preparations for regional meetings		SFDT
<b>Stewardship Education Launch Events Regional Meetings of Clergy, Wardens, Treasurers and Synod Delegates</b> An orientation and overview of preparations for a regionally based program. <b>Regions/parishes indicate initial level of readiness and interest to participate in the stewardship education plan</b>		<b>Bishop &amp; SFDT</b>
<i>Key Milestone: All parishes participate in their Regional Meetings</i>		
<i>First Stewardship Training Modules offered to parishes for participation</i>		SFDT
<i>Stewardship &amp; Financial Development Team Planning Retreat Weekend to review planning for spring and fall</i>		<b>Bishop &amp; SFDT</b>
<i>Consultations held with Parish Councils that have indicated an interest and readiness to participate in their regions stewardship education plan as a pilot project. Parishes covenant as to their goals and their engagement in the regionally based stewardship education initiative and appoint a team.</i>		SFDT
<b>Assessment Survey or Planning Study</b> is conducted with parishes ready to move forward with engaging in a regionally-based stewardship program		SFDT
<b>Key Milestone:</b> 1. 2 regions sign a majority of their parishes for full participation in the stewardship education initiative 2. 15 additional parishes attend some of the training modules OR all parishes indicate their participation in at least one module this year		
<b>Stewardship Training Modules offered</b> – such as strategic planning preparation, growing your congregation, leadership development, stewardship education etc.		SFDT
<b>Program evaluation and refocusing</b> – the entire stewardship education program is reviewed		SFDT

**Implementation Phase Detail:**

- Preparations completed for Regional Meetings
- Development of First Stewardship Training Module(s)
- Regional meetings conducted with full participation
- Full attendance of SFDT members to a planning retreat
- Consultations organized with select regional Parish Councils
- Preparation of the Assessment Survey or Planning Study process
- Preparation of Stewardship Training Modules
- Monitoring of progress

## Appendix A: Project Overview - Our Journey Moves On!

### Background:

Our diocesan Shared Ministry Plan (2007) outlines the way forward for our journey as a diocesan community. At this point it is more of a “compass” than a “road map”. It points clearly to our direction and, trusting that God is with us, we have been proceeding in faith with its development. Now we must take the next step in clarifying its implementation.

We are asking you prayerfully to help us discern the “road map” for the implementation of our Shared Ministry Plan along with the strategies and tools that will ensure that parishioners and clergy are engaged in the objectives and goals of fulfilling these plans. With the help of our partnership with General Synod we are undertaking a special planning study that will provide us with the clarity that is essential to our faithfulness as a diocesan community.

### Our Shared Ministry Plan

In 2005 Bishop Claude Miller approached General Synod for consideration of the Diocese of Fredericton to be a “pilot project diocese” as part of a new General Synod initiative called Letting Down the Nets. This initiative was designed to establish partnerships between General Synod and a number of dioceses that were interested in developing and implementing ministry in the areas of strategic planning, stewardship education, congregational development and financial development. The Diocese of Fredericton was one of six dioceses that were chosen to be pilot projects.

The first step in the process was the Shared Ministry Plan that we developed together in the spring of 2007. This plan is based on the following mission and vision and foundational values:

#### ***Mission:***

“To proclaim the Gospel of Jesus Christ for the making of disciples”

#### ***Vision:***

“We are called by God to be a diocese of healthy, mission-focused, welcoming and growing parishes”

#### ***Foundational Values:***

- Christ-centred and Spirit-filled
- Biblically based
- Shared Leadership and shared responsibility for ministry
- Within the worldwide Anglican community
- Growth-orientated
- Responsible stewardship
- Partnership
- Inter-generational ministry

We developed the following four “pillars” as central to the plan:

- ❑ Develop and pilot models for sharing ministry
- ❑ Equip leaders with tools, training and support
- ❑ Become one: heal our fractured relationships
- ❑ Resource our plan/steward our resources

In the past year we have moved forward to implement the Shared Ministry Plan in a variety of ways such as:

1. Developing a broader understanding of the role of the “Vocational Deacon” within parish ministry
2. Reviewing Diocesan Communications through The Report of the Task Force presented to Synod 2007
3. Continuing activities in the areas of Christian Education and Youth Ministry
4. Continuing with our annual Clergy College, Clergy Conference and the opportunity for Clergy Sabbatical as vital opportunities for clergy support and training
5. Developing plans for pilot initiatives in ministry sharing projects

The time has now come when we need to do a lot more to implement our Shared Ministry Plan effectively.

### **The Development of Healthy Congregations**

We want to approach our Shared Ministry Plan and the development of healthy congregations building on what we have learned to date as well as the learnings that our General Synod consultants have been able to share with us from their experiences in other dioceses.

Our vision of a healthy congregation includes the following:

- a community which sees its tasks as to be disciples and to make disciples;
- a worshipping community of Christians who meet regularly to worship God, in word, sacrament and prayer, and to share fellowship with one another;
- a base which provides opportunities for learning and growth, and which shares its gifts and resources with the diocese and with others beyond themselves;
- ability to generate suitable leadership (ordained and lay) to maintain these activities;
- capacity to provide facilities appropriate to its needs;
- ability to address the spiritual and physical needs of the people living within its neighbourhood, often in cooperation with other congregations and sister churches;
- capacity to generate the required income level and other resources to support all of the above;
- joyful Christians who respond to God with thankful hearts from their abundance

The goals that need to be addressed through our shared ministry plan include a concentration on the fourth pillar of the Shared Ministry Plan – “Resource our plan/steward our resources”. Our proposed stewardship initiative includes addressing spiritual needs, generating adequate income, developing thankful, generous Anglicans in our diocese. A biblically based stewardship education program is critical to ensuring that Anglicans recognize the role that generosity plays in their lives in the light of their own relationship with God.

We are talking about creating an atmosphere for the conversion of the heart.

The way forward with our Shared Ministry Plan having been charted through this study, it also remains for us to obtain the resources necessary to successfully fulfill God’s call and vision. Our Stewardship and Financial Development Team with assistance from the consultants provided by General Synod is now

planning to develop and implement a stewardship process to assist parishes in the areas of visioning, stewardship education and financial development. Through this process we anticipate that we will be able to assist all our congregations to be “healthy congregations”.

We need to work together to identify the particular needs and assets of parishes, clergy and lay leaders, so they can conduct more effective programs:

- that invite parishioners on a faith journey;
- that assist a congregation in developing a parish vision;
- that develops strong leaders;
- that assist a parish in developing a narrative budget and best practices in giving time, ability and money;
- that create a climate for conversion to a new way of thinking about our God-given resources;
- that strengthens the spiritual health of our parishes and congregations so that we may be better able to witness to the Gospel of our Lord in our communities.

### **The Situation**

Many of our parishes are facing a variety of challenges. Changing demographics have resulted in declining numbers of parishioners in some areas. Good stewardship requires that we consider new models of ministry, amalgamations, reducing numbers of buildings. There are increasing numbers of parishioners in other areas of the diocese. Good stewardship requires that we consider whether we have church buildings in the right locations. Some parishes are experiencing reduced offerings and rising expenses moving them into a survival mindset. Often these parishes are so beset with financial issues they become unable to reach out into their communities. At the same time there has never been a time of greater need for us to proclaim the Gospel message. Youth are seeking spirituality from sources other than the church. The message of scarcity from society is deafening. The needs of the poor and oppressed are growing.

Our partnership with General Synod can help address these challenges in our parishes. Stewardship education is needed to help remind people that, in fact, “all things come of thee, O Lord, and of thine own have we given thee”. It is needed to help people develop a generous spirit as part of our spirituality. Spiritual growth is not a destination. It needs to be nurtured, fed and continually deepened as we continue on our journey. We may be at different places on our spiritual journey, but everyone is able, and is invited by God, to grow into a deeper relationship with God and with God’s creation.

### **Why Stewardship Education?**

Stewardship had been defined as “what we do after we say we believe”. The consistent image of a steward throughout scripture is that of a faithful servant or manager, carefully tending the master’s property, investing and growing the property in preparation for its ultimate return to the master.

Our General Synod consultant’s advise us that from their learnings across the country the following tendencies exist:

- people consider what they have to be theirs and not God’s (What of mine should I give to God? rather than, What of God’s should I keep for myself?)
- people “give” to meet a budget, out of a sense of “duty” rather than joyfully from a thankful heart
- there is an atmosphere of scarcity not abundance

One way to address this in our parishes is by sharing stories of our personal and corporate relationship with God. How is God made manifest in our relationship with others, our neighbours and strangers we meet on our way? How is God made manifest in our relationship with God's creation, the earth? How is God made manifest in our relationship with all the blessings we have received including our money? Some may feel as if they have not been blessed when money is the topic of the day. These feelings cannot help but have an impact on our spiritual health. By exploring the nature of these relationships we can learn a lot about our spiritual health and begin the process of healing.

Working in partnership with parish leaders, a biblically based stewardship education process will be developed by the Stewardship & Financial Development Team for use throughout our diocese.

### ***Potential Program Objectives of the Fourth Pillar***

1. Increased knowledge e.g. Biblically based understanding of stewardship
2. Change of attitude e.g. Experiencing joy in the use of financial resources as an expression of faith
3. Changed behaviour e.g. Making a change in our financial giving patterns

### ***Possible Program Principles***

- Sharing faith stories deepens faith, spreads the Good News, and opens new understandings of God at work in individual's lives and in faith communities.
- People, individually and corporately, need a clear vision for life. People will not support a vision they don't understand. "Without a vision, the people perish."
- We have not all come to know God in the same way.
- The greatest growth in giving is realized by those who have an opportunity to experience conversion of the heart.
- Stewardship education/development is evangelism.
- Stewardship is a spiritual issue not a money issue.
- In parish life, money problems are symptomatic of other problems.
- God provides abundantly. Just distribution is our responsibility.

### **Your Input and Advice is Needed**

What does **your** parish need from the diocese to achieve the four pillars and above goals? We are asking you prayerfully to help us discern a strategy and tools that will ensure that your parish program that is developed will engage parishioners and clergy, in a transformational experience; one that is faithful to the Gospel's call to examine the relationship we have with our money and possessions. How can we create a climate in which participants feel safe to begin their journey of discovery about the spirituality of money and its role in our lives? How do we ensure that the fullness of stewardship theology is kept before us without ignoring or downplaying the important topic of financial stewardship?

As part of our partnership with General Synod, we have been provided with the services of Geoff Jackson and Rob Waller, who are the consultants working with the pilot project dioceses. They will be conducting one-on-one interviews and focus group meetings with a broad cross-section of people representing the diversity of our parishes.

We hope that you agree to participate in one of these sessions to share your wisdom and experience with us as this journey moves on!

Thank you for taking the time to read this proposal and considering your opportunity to be part of this exciting work!

## **APPENDIX B: Discussion Stimulant (Questionnaire)**

These are the questions that the interviewers asked in order to stimulate discussion and gather information and advice from the interviewees. Given that each person was asked approximately 22 questions, there were literally hundreds of views and opinions expressed. These responses have been compiled into a separate report entitled 'Findings and Observation'.

### **1. How would you rate the diocese's image and reputation in your parish?**

Excellent:                      Good:                      Fair:                      Poor:                      No Comment:

### **2. What are the things you value deeply about your parish? How could it be improved?**

### **3. What do you understand your parish's goals/priorities/vision to be at this time?**

### **4. What are the major concerns of your parish?**

### **5. How important is 'Our Shared Ministry Plan' and the plan to establish 'Healthy Congregations' and a biblically based stewardship education program (with diocesan support)? To you? To your parish? To your Region?**

### **6. Can you please rank in order of importance to you, the 'four pillars' of the Shared Ministry Plan?**

### **7. What is the most important next step the diocese must take with implementing 'Our Shared Ministry Plan'?**

### **8. In your opinion, what are the particular strengths of the diocese and your region? Are there areas that require improvement?**

### **9. Do you endorse the goals and plans of the proposed stewardship education program as outlined in the Project Overview?"?**

- Increased knowledge (e.g. Biblical based understanding of stewardship)
- Conversion of attitude (e.g. experiencing joy when we use our financial resources as an expression of our faith.
- Changed behaviour (e.g. Making a change in our financial giving patterns)

Fully endorse:      Partially endorse:      Do not endorse:      No comment:



**14. Would your parish consider increasing support to the diocese? For what initiatives? If yes, what would be the best way to increase funding support?**

Yes:

No:

Uncertain:

**15. How would you rate the dioceses' and The Anglican Church of Canada General Synod's ministry as a recipient of your parish's financial stewardship? Personally?**

*My rating of our parish giving to Diocese:*

High priority:

Worthy of support:

A Low priority:

No Comment:

*My rating of our parish giving to General Synod:*

High priority:

Worthy of support:

A Low priority:

No Comment:

**16. How important is it that your parish participates fully in the diocesan stewardship initiative outlined in the Project Overview?**

Very Important: Important: Somewhat Important: Not Important: No Comment:

**17. Do you have any suggestions as to what must be done in order to develop and support a parish-based stewardship education program in the diocese, ensure stronger relationships and better communications?**

**18. Could you suggest the names of individuals who, because of their stature and commitment, leadership skills and organizational ability would be good leaders to work on a stewardship education plan in your parish? In your region? In the Diocese?**

**19. What advice do you have for ensuring the successful implementation of the proposed stewardship education plan within your parish? What are the major problems your parish could face?**

**20. Do you think that the diocese communicates well with parishioners?**

**21. What is your preferred method of receiving information (please rate each on a scale of 1 to 10, 1 being least preferred and 10 being most preferred):**

- Email
- E-news service
- Anglican Journal
- Diocesan website
- Parish bulletin
- Other...?

**22. If you had three visions or hopes for the diocese, what would they be? OR If you had the opportunity to shape the future of the diocese what would it look like?**