

# **The Planning Study Report**

**For the**

**Diocese of Nova Scotia and Prince Edward Island**

**June 1st, 2006**

**(Time lines have already been adjusted  
and will need further adjustment as we proceed.**

**Bp Sue)**

***(Diocesan Council will meet September 13, 10am to 4pm to discuss and act on  
this report.)***



***Prepared by a consultant team from General Synod***

**Canon Geoff Jackson, Senior Development Officer of the Anglican Church of Canada  
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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), a new 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 March 3<sup>rd</sup> to March 8th, 2006 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 would reveal a lot of opinion and insight into how the diocese needs to move forward with its vision of healthy congregations and in particular a new stewardship initiative.

The Planning Study has been prepared based on information that was carefully gathered from interviews with 30 constituent leaders plus five focus groups comprising 26 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 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.**

The context and purpose of the Planning Study was presented in a document called *Journey: A Stewardship Discovery Programme* (see Appendix B) which emphasized the following key points:

- The goals that need to be addressed through this stewardship initiative include spiritual 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 our diocese and the Letting Down the Nets initiative will provide us with 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 (SRDG) 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 test certain factors in the life of the diocese and regions;
2. To identify how best to structure and position 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;
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:

- Vision 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.

The Findings section in Appendix A presents the statistical responses and provides observations of the interviews and the focus groups. This leads to an analysis of the strengths, weaknesses, opportunities and threats and to recommendations which the consultant team believes diocesan leaders should follow in moving forward.

We want to acknowledge that as this study unfolded it has lead us to a recognition that the diocese is facing some critical challenges that appear to be calling for 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. This initiative will not be seen to be faithful or successful if it is simply about doing more of the same.

A word of appreciation is due to Bishop Sue Moxley and Charles O'Neil for assistance with the planning and implementation of the study. We are very grateful for the key administrative support and guidance provided by Kathy Saunders who arranged and coordinated appointments for the interviews and the focus groups. 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

## **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(s) 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

## **Analysis of The Findings**

The following recommendations are based on an evaluation of the data derived from the interviews (see Findings section) and the results of the following SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) regarding the present situation within the diocese as they relate to the four areas:

*Vision and Case for Support*

*Relationships and Identity*

*Leadership, Ministry and Management*

*Anticipated level of Support*

### **Strengths:**

#### ***Vision and Case for Support***

- Diocese has discerned together a clear roadmap for the future and articulated four areas of emphasis
- The diocese for some parishes has provided the vital support for their survival and overall success
- Some older churches are acting proactively and moving successfully to a 'better' location and facility for ministry and outreach
- The Leap for Faith Campaign's success was due to people's willingness to support a broader diocesan vision for the future than the diocese's current context
- There are new growth (population) areas opening up in the diocese
- The relationship between parishes in the Cape Breton area appears to be working well
- There have been some wonderful experiences in the Cape Breton area as a result of amalgamations

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

- There is a growing acknowledgement that collegiality within clergy is building along with openness and healing – it is a new day
- Deanery Clericus meetings

#### ***Leadership, Ministry & Management***

- The leadership and presence of the Bishops is very empowering – the diocese acknowledges it has never had such pastoral and skilled Bishops
- Very capable 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
- The diocese's Committee of Chairs meets every six weeks
- Diocesan Council is comprised of very strong leaders
- Janet Marshall's consulting work is highly respected in the diocese

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

- Most leaders acknowledge there is great wealth potential in the diocese especially in particular parishes
- David Reid is highly respected as a motivator of stewardship education
- Charles O'Neil's gift planning work is highly respected
- The pre-authorized giving plan is growing in acceptance and use in parishes throughout the diocese and is having a very positive impact
- Gift planning is well-received and is generally viewed as a vital key to the future

### **Weaknesses:**

#### ***Vision and Case for Support***

- The diocese's vision is valued and appreciated but it is not 'owned'
- 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 with amalgamations 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
- The diocese has no communications plan or perceived communications expertise
- There is a decline in the number of people who can give effective leadership
- 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

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

- There is a perception already that this 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 Episcopal team is not perceived to be working well
- The priest is the only interface (and possibly gatekeeper) 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 allotment
- Parishioners do not recognize any benefits in paying the diocesan allotment 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 centre
- The parishes generally do not experience themselves as on the 'same level' with the diocesan centre which encourages a general lack of support for the diocese
- The parishes experience that most communications from the diocesan centre is directed to money matters
- There is virtually no awareness of who are the members of Diocesan Council

- 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

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

- Synod's are not perceived as a valuable use of time
- A whole generation of clergy that are not educated in stewardship
- The diocesan centre can direct its funds at will without any accountability or report to parishes
- Many congregations are 'frozen' simply due to a lack of financial resources
- 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
- The incredible diversity within the diocese makes it virtually impossible to communicate one key message that will 'connect' with all parishes
- Diocesan Council has become a 'rubber stamping' body
- Parishes not paying their allotment
- Diocesan leaders put a lot of effort into their committees but there is a lack of coordination
- The structure of the church past the basic parish structure does not carry any true meaning or significance
- No one person in the diocese knows everything that is happening in the diocese
- Regional Deans are perceived as the organizational interface between the parishes, the Diocesan Centre and Diocesan Council
- The 'lines' between the role of the Regional Deans and Archdeacons is viewed as 'blurred'
- Members of Diocesan Council are not selected based on skill sets
- Atlantic School of Theology is not perceived to be providing any leadership role

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

- The Leap for Faith Campaign's approach to stewardship created some 'fall out' in parishes in regards to teaching stewardship
- 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
- Economically parts of Cape Breton have lost a lot
- The capital campaign may not generate sufficient funds to sustain the new ministries being started

## **Opportunities:**

### ***Vision and Case for Support***

- 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 Vision and goals and works to align and unify the diocesan infrastructure
- Amalgamations are necessary and vital to the future
- For a revival
- Create a region-wide or diocesan-wide stewardship network of trained people in fields of expertise
- 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 Cape Breton and PEI will need to know how this initiative will benefit them as they feel isolated from the rest of the diocese

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

- Base this initiative in the regions (not Halifax) and 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
- Clear relevant ways to communicate to younger people

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

- Adapt intentionally the current ‘us’ and ‘them’ organizational structure to a unified, coordinated structure
- 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)
- 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 Management Team structure
- The diocesan centre could offer resources to parishes from liturgy to congregational development to useful broad-scale stewardship resources
- Many parishes need to grow physically

### ***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 huge financial resources

## **Threats:**

### ***Vision and Case for Support***

- 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 very 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 Vision and clearly establish the diocesan priorities for meeting the milestones and timelines for realizing the Vision
- An attempt to correct all the diocese's 'ills' at once

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

- The lack of an Anglican identity
- The fear and anxiety that is produced from hearing about other parish closures
- The diocesan allotment rate is perceived generally as too high by parish leaders along with the added perception that diocesan leaders certainly do not want to change the allotment rate
- A generally held view that the diocese is wasting a lot of money and that parishes are sending money to the diocese for the 'palliative care' of declining parishes
- The negative impact on parish leaders of the 'badge of shame' ( not paying their parish diocesan allotment)
- The culture of congregationalism that is nurtured by mingling with other denominations and Christian community leaders
- 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 Management***

- The view that the diocese must deliver the Leap for Faith initiatives and that parishioners must see the funds being used for that purpose
- The diocese has no effective means of communications with any of its constituencies and there is no effective way to communicate diocesan programming
- Last minute decision making at the Synod Office reflects poor organization and follow through
- A view that the maritime travel distances are too far for clergy or lay leaders to gather as a diocese
- There is feeling of apathy in many congregations
- The diocesan infrastructure fails to adapt to meet the current challenges in the parishes
- The Episcopal leaders are perceived to be the only organizational 'links' between Diocesan Council, the Archdeacons and the Regional Deans
- There are virtually no resources or help for parishes facing an amalgamation

- Diocese chooses too many horizons and organizes too many committees/task groups and not functioning according to the Canons

***Anticipated level of Support***

- Clergy too 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 allotment they perceive the diocese as working ‘against us’
- Parishioners being hesitant to leave a bequest to ‘operations’ which forces parish leaders to have to ask constantly for funding support
- A major threat is the history of mismanagement of accounting at the Diocesan Centre

These strengths, weaknesses, opportunities and threats have been provided as rationale for the following analysis, recommendations and critical path/timeline.

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.

**In the opinion of the LDTN Team, the diocesan community is in an extremely vulnerable and potentially ‘at risk’ situation if it does not...**

- A. develop well-coordinated strategies for strengthening relationships and communications with parish leaders;**
- B. intentionally address the key issues being raised in the study and in particular the relational, organizational and financial governance concerns;**
- C. consult with clergy and lay leaders in developing a plan for strengthening parishes through a stewardship education initiative in which they have ownership;**
- D. implement a well-coordinated and well-resourced plan for strengthening parishes through the stewardship/ congregational development initiative;**

**This is a defining moment in the history of the Diocese and there will most likely only be one opportunity to do this initiative well.**

The following recommendations are intended to provide an overarching picture of the key strategies and plan that, if implemented in a well-coordinated way, will provide the basis for building one step upon the next step towards ensuring that the needs and Vision of parishes and the diocese are serving God’s purposes faithfully.

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

There is strong support indicated for the proposed directions as outlined in the Project Overview and sufficient committed leadership is available to move forward with the proposed next steps that need to be reviewed by diocesan leadership and the newly-formed Stewardship Resource Development Group. Based on the results of the interviews, it is the LDTN Team's opinion that the diocese must continue to build momentum by implementing the proposed next steps.

'Breaking through' to a new way of serving the diocese will require bold decision-making, fresh initiative that is 'gospel-driven' and not 'survival-driven', hard work and a renewed commitment to the diocese's mission. It will include a belief that growth is possible for the diocese with an understanding of growth that is multi-dimensional: making mature disciples, developing communities, learning to serve and adding people to the community of faith and growing stewards who 'take care of' the gifts of creation and redemption.

In the early stages the Management Team will be responsible for developing and managing the fulfillment of clearly identified and challenging goals and objectives that ought to be established as an outcome of this Planning Study including the initial goals and objectives of the Stewardship Resource Development Group. The demands and challenges of the next steps require that consideration be given to having the Management Team's expertise and leadership around the implementation of the overall direction and initial stages of the stewardship education program until the program has achieved certain milestones that ensure a successful start and a solid base of support. This will ensure a critical mass of effective leadership is taking charge of this until the Stewardship Resource Development Group has time to firmly establish its identity, core leadership/organization and mandate. The Management Team should take extra care to engage the Chairs of the standing committees in understanding and advocating the overall direction.

There must be a critical mass of leaders and workers who have the expertise, passion and commitment to get things done in a timely and effective manner. In the course of the interviews a list of additional leaders was compiled confidentially.

The Stewardship Resource Development Group will likely need to meet as many as six times a year and 'the group' might be comprised of the following: Bishop (ex officio); Chair; Deputy Chair, Administrative Coordinator, Regional Deans (ex officio) and Area Stewards/Coordinators (14). The Stewardship Resource Development Group would have at least three sub-task forces which would include a Stewardship Education Task Force (2), a Parish Leadership Training Task Force (2) and a Communications Task Force (2).

In order to ensure that the appropriate level of leadership, coordination and priority be given to the implementation of the stewardship education program work and timeline it will be vital that the Chair of the Stewardship Resource Development Group is an ongoing member of the Diocesan Executive and an ex officio member of the Management Team.

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 Bishops and Office Staff make the appropriate adjustments to the governance and infrastructure to improve effectiveness in the facilitating and communication of the

- stewardship education initiative (the Bishops' top level involvement and public leadership will be critical);
- b) the Management Team including leaders of the Diocesan Strategy Planning Group and the Stewardship Resource Development Group, and others as requested by the Bishops, takes time to jointly work through the questions/issues surrounding Vision, identity, governance and other key issues of importance raised in the Study and ensures the appropriate linkage is made to the development of a diocesan strategic plan that integrates the stewardship education initiative as a vital component;
  - c) addressing the question of appropriate, equitable financial support for the common ministry and mission of the diocese (allotment);
  - 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 stewardship education initiative;
  - f) a stewardship education initiative that is a parish-based program 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 Executive and clergy and participating parish leaders.

## **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 Case for Support**

2. The excellent leadership provided by the two Bishop's in articulating a compelling vision and direction of the diocese has established a good base of support (and hope) for the four areas outlined in the diocesan Vision Statement. The financial success of the Leap for Faith Campaign has demonstrated the diocese's ability to raise up leadership and organize effectively to work together towards clear goals and objectives. It will be important to build on the positive learnings of the campaign experience (clear case for support, strong leadership, cohesive plan and organization and good communications) and integrate those 'learnings' into the plan to establish healthy congregations and a biblically-based stewardship education initiative. One of the important findings relating to the Leap for Faith Campaign was the development of the clergy segment. Our understanding is that the clergy were identified as a group to be visited by other clergy. This obviously worked well and perhaps

there is a lesson to be learnt here as we move towards a stewardship initiative in the diocese. It will be vital to get support from clergy generally for a stewardship initiative and perhaps visits from committed clergy to others, preferably on a one-on-one basis or perhaps in small groups may be a beneficial step in the education process.

3. This is a large diocese where there are considerable differences in culture, history and economic conditions in different parts. Two thirds of all diocesan clergy are serving in rural areas. There is a recognition that 80% of the churches are in slow decline. For many their mission is simply survival especially in the rural areas. There has also been a migration of people mainly from the rural areas to the cities but also out of the province. Some communities have reduced by 50% in recent years. The challenges for clergy and diocesan leadership are immense.

4. Many 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 resources and virtually no support. Many parishes want to establish parish-based outreach into their broader community.

5. The Cooperating Congregations process is seen to be addressing some of the issues around establishing healthy congregations but the process is seen by some as not being applied equally – there is a feeling that those who are willing to make a strong case to Bishop Fred to leave a congregation ‘as is’ will get heard. We also heard from a number of interviewees that the diocese may have too many buildings in certain areas or too few buildings in areas where growth is occurring. Perhaps it may be advisable to conduct a demographic study of the diocese such as that undertaken by some other dioceses in the country, in particular using the services of AMB Research.

6. Many parish leaders shared perceptions and experiences of the ‘diocese’ that, regardless of the love and respect for the two Bishops, indicate a history of parish leadership feeling that “we are on our own”. Although there are some parish leaders that spoke highly of the support from the diocese, 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. 50% of the study participants indicated the diocese has a ‘poor’ or ‘fair’ image and reputation in their parish. Poor communications and issues such as the diocesan allotment simply compound 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 direction because, in part, the diocese’s vision is experienced for the most part as irrelevant to the issues facing parish leaders and to the person in the pew.

7. Although there is apparently very limited ‘ownership’ of the diocese’s vision and goals, over two-thirds (67%) of the study participants rated the diocese, as a recipient of their parish’s giving, as a ‘high priority’ or ‘worthy of support’. 94% of the interviewees ‘fully endorse’ or ‘partially endorse’ the goals and plans of the 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 suggested that 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 the majority 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 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 serious challenges. 90% of the interviewees indicated that their parish's full participation in a parish-based stewardship development initiative is 'very important' or 'important'.

However, there is a diocesan 'culture' that avoids teaching parishioners about holistic stewardship which has led to the view of stewardship as fundraising and a less effective means of fund raising at that. Seventy percent (70%) of study participants stated their parish does not teach proportional giving or tithing. 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.

9. Although there is lots of talk and expectation around the projects that will be funded through the Leap for Faith Campaign, the diocese's goals/priorities/vision are mainly perceived to be surviving financially and maintaining the status quo. The interviewees and focus groups all highlighted the desire for a way forward. The development of a stewardship education program is very much appreciated. Many interviewees expressed difficulty in seeing a vision behind the stewardship education program and perceive it as being driven primarily by diocesan financial need.

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

11. It is imperative that the Diocesan Strategy Planning Group reviews the findings of this planning study report as a component of their research. In the opinion of virtually all interviewees there is not a well-articulated and clear picture of how the diocese will move forward on the Leap for Faith projects.

12. The interviewees appear to hold strong support for the work of General Synod and missions internationally but there does not appear to be passionate support for any local diocesan missions.

13. The average parishioner does not know that they are giving to the diocese and General Synod and yet approximately two-thirds of the study participants rated their parish's support for the diocese as either a high priority or worthy of support and 75% of study participants rated General Synod as either a high priority or worthy of support . The current motivation for giving to the diocese is duty and obligation because there is very limited communication and awareness. The people in the pew do not see or experience 'the diocese' 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 Resource Development Group ought to give consideration to preparing a diocesan narrative budget and 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 church planting) along with some of General Synod's new initiatives articulated in the *Framework* document (<http://www.anglican.ca/resources/framework.htm>) such as ministering to youth and young adults. Some of this information already exists but there is a need for greater clarity about the diocese's 'big picture'. 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 are utilizing to determine their level of ownership and support for various diocesan ministries and missions 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.*

15. More specifically, the Management Team must address the findings of this Study and create simple strategies that show a determination to listen and respond intentionally to those things that can be changed so that the actions and attitudes of diocesan leaders and staff are in alignment with the spiritual and financial goals of the diocese. Diocesan leaders must be prepared to consistently answer the "tough questions" that parish leaders will ask by putting together a specially prepared Question and Response format that speaks to the heart of the issues identified in this study. This will ensure a strong and united signal of support to the constituencies of the diocese.

## **Communications Plan**

16. Communications was identified as a major concern by the interviewees. In a diocese of this size and with such a high level of geographical diversity, complexity and sophistication it would appear to be critical that the diocese have a Communications and Marketing Plan supported by a part-time or full-time Communications Officer or Coordinator. The position of a Communications Officer ought to be taken under consideration.

In the earliest stages of the Preparations and Consultation Phases, a communications task group needs to undertake the completion of an internal and external Communications Plan that includes an energetic and major public relations effort to increase and enhance the profile of the diocese's vision and the entire regionally-based stewardship initiative process.

### **Relationships and Identity**

17. There is a deep appreciation of the Bishops. Study participants were very articulate about their praise for the two very different skill sets but some study participants questioned whether the Bishops are working in harmony. There is a growing acknowledgement that collegiality within clergy is developing along with a fresh openness and healing. It really is a new day in the diocese and people can see that intentional steps are being taken to develop stronger ties and understanding. It is vital that this 'new day' continue to be nurtured and developed. This stewardship 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.

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

It is the 'behaviour' coming out of the Diocesan Centre that should be reviewed intentionally. A few study participants shared that their telephone calls to the Diocesan Centre are often not responded to in a timely manner. Many indicated that most communications from the diocesan centre is directed to money matters. The experience and perception of the Diocesan Centre is that it can 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 Bishops say. There must be immediate organizational alignment with the pastoral and organizational 'values' of the Bishops and there must be a change in the communications stance as soon as possible.

19. In the diocese a healthy parish is perceived as one that pays its allotment. The allotment system is not viewed favourably and causes mistrust of the system and impedes

relational trust. Parishes seem to be able to ‘get away’ with not paying their fair share without any consequences – this may not be true but this is the perception. Parish leaders tend not to recognize or acknowledge any benefits to their parish in paying the allotment. The clergy are the primary interface to the parish and need some very basic tools and resources to help their parish see a meaningful connection to the diocese.

20. Interviewees expressed a strong sentiment that the diocese will most likely impose this stewardship program. They wanted to be clear that parishes will be sure to do their own thing. There is a history of resistance to most any program originated from the Diocesan Centre. Clergy and lay leaders were emphatic that this stewardship initiative must be based at either the regional or parish level.

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 even suspicion.

22. The Bishops 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 come about through ad hoc or an invitation to participate in a shared event. Very few of the 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 Bishops seem to be prepared 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. 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 with parishes which is impeding the momentum and creating a lack of transparency and understanding in the direction and process the Bishops are taking. Diocesan leaders also see the lack of integrated and coordinated diocesan committees and planning structures. The current stated diocesan committee structure is not being followed and the Bishops seem to be dealing with this by forming committees and task forces as they see them needed. The two Bishops appear to be the only organizational 'links' between Diocesan Executive, the Archdeacons and the Regional Deans. Perhaps there should be a full review of the structure now. The recommendations of this study are intended to provide the Management Team and Diocesan Executive with the mandate to move forward boldly and imaginatively.

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 challenges. There is often great frustration at the diocesan committee level where people can work for hours on an important initiative only to see their work sidelined by the Diocesan Executive. For many people the Diocesan Executive has simply become a 'rubber stamping' body. 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 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 stewardship education program. The Stewardship Resource Development Group's ability to mount a successful stewardship education initiative depends upon the recruitment of volunteer leadership to help coordinate the planning in areas of the diocese. 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 SRDG (Stewardship Resource Development Group) 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 people available to parishes. The diocese was apparently well served in the area of stewardship when Archdeacon Reg Macdonald was the Stewardship Officer and some study participants questioned why this position had been dropped. At that time the diocese had a significant inventory of resource materials.

The diocese does have access to consultants in the area of stewardship. Some parishes have already contracted the services of Janet Marshall to assist them with visioning work often on a cost-sharing basis with the diocese. This has proven to be very effective according to study participants and needs to be enhanced. Janet also has proven skills in the stewardship area as well. Charles O'Neill and David Reid are both well known across the diocese as leaders and potential resource people in the areas of stewardship and financial development. There are also a good number of clergy with particular expertise, interest and experience that could be drawn upon for the development of the diocese's stewardship education initiative.

28. Lay leaders and clergy hold the Bishops in the greatest respect but there are indications of a strong perception within clergy and lay people that the diocese is not listening to their concerns and that the Bishops need to provide stronger oversight and leadership to ensuring a consistent follow through on new initiatives such as the development of a clear amalgamation process that everyone understands and follows. There are a growing number of negative perceptions that the diocese is moving too slowly in addressing non-viable parishes or that clergy are not held accountable. Study participants emphasized that the diocese must deliver the Leap for Faith initiatives and that parishioners must see the funds being used for the intended purpose.

29. Many interviewees commented on how the stewardship education initiative provides an opportunity for the diocese to provide a framework within which all parishes could grow or teach basic stewardship education or discipleship making. Many interviewees commented on how this needs to be a time for genuine spiritual renewal. 90% of the interviewees indicated that the stewardship education initiative is 'very important' to them personally while 70% of the interviewees indicated that the initiative is 'very important' or 'important' to their own parish's future.

30. At this point approximately 30-40% of the parishes in the study indicated that they have a stewardship committee or a stewardship plan. There was generally a lack of understanding as to what a stewardship plan looks like. These parishes are also focusing on Biblical stewardship teaching. Consideration needs to be given to the value of having parish stewardship officers who become members of their parish council.

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 Management Team for consideration of the appropriate action. The position descriptions for staff, archdeacons and regional deans appears to be loosely organized and the Terms of Reference for the various committees does not appear to be clear. Regional Deans are perceived as the organizational interface between the parishes, the Diocesan Centre and Diocesan Executive. The 'lines' of responsibility/authority between the role of the Regional Deans and Archdeacons is viewed as very 'blurred'. The SRDG (Stewardship Resource Development Group) will need to be empowered with enough authority 'to do what it takes' to provide the high level leadership that is essential to make this kind of an initiative successful.

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 number of 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 very 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. During the interview process a number of financial governance issues were raised that indicates a disconnect between the parishes and the diocese particularly in the area of finances. The existing Synod Office staff has done an excellent job in bringing the financial management of parish accounts to the necessary level of gaining the trust and respect of parish officials. However, the past practices of mismanagement will take a long time for these to be forgotten by parish officials. It is our understanding that there are still differences between the accounting records of some parishes and the diocese relating to payments made (or not made) by parishes to the diocese.

It was disturbing to discover that the arrears relating to the allotment system stood at \$ 1.9 million, especially bearing in mind that in the year 2000 all outstanding allotment was forgiven, in the spirit of Jubilee. Of perhaps more concern was the knowledge that there is a current outstanding amount of \$ 600,000 relating to payroll, although it is not known how much of this relates back to the change in the accounting system in 2001.

The arrears of allotment suggests two things; either some parishes do not have the financial resources to meet the suggested allotment target or some parishes choose not to make payments at the required level. The same two situations likely exist in relation to outstanding payroll amounts. We also sensed frustration from some interviewees in that they believed that insufficient action was taken with those parishes not paying their full share of allotment or payroll which leads to the feeling by some parishes that do pay their full share, of saying, 'Why should we bother'.

If some parishes are unable to pay the allotment or payroll based on their financial position this would indicate that, in the case of allotment, the present system is unfair or in the case of payroll arrears this would perhaps indicate that the current parish configuration is not working.

Based on our observations across the country it seems that there is a need to develop a base for a parish that, in normal circumstances, would enable the parish to meet its financial obligations in terms of payroll and allotment. In simplistic terms this would probably mean that for a parish to be financially healthy and able to justify full time ministry there needs to be a minimum income level of between \$100,000 to \$ 120,000 and an Average Sunday Attendance of 100 people. If there are current parish configurations in the diocese that do not meet whatever minimum standards are applicable, then perhaps there is a need for some new parish configurations.

There is confusion across the diocese about the allotment system despite the attempts by diocesan leaders to clearly explain the system when presenting the annual diocesan budget. Perhaps there are too many variables for people to see exactly how the present system works – examples of this are the changing rate of allotment from one year to the next and also the variance in the “acceptance percentage”. It is our opinion that the present system of allotment is too complicated for the average parishioner to understand. We suggest that the system be revised so that all parishes have the ability to see clearly how their contribution to the diocese and beyond is calculated.

We recommend that a revised system be:

- a. As simple as possible
- b. Fair and equitable for all parishes
- c. Based on the income of a parish
- d. Mandatory i.e. 100% acceptance rate would be applicable
- e. Monitored by diocesan staff on a monthly basis
- f. Supported by a pastoral procedure to deal with changing circumstances in a parish

A mandatory system that allows for 100% of the allotted amounts to flow to the diocese, even if some of this may be in the ensuing year, allows for better budgeting by the diocese. However, the parishes will likely only accept a mandatory system if the other elements outlined above are implemented. We suggest that using ALL income generated by a parish is the fairest way of adopting a fair and equitable system. We do suggest, however, that two deductions be permitted from the income level; first, any income that is used or is planned to be used for capital expenditure purposes and secondly, any amounts collected at the parish level for onward transmission through the diocese to PWRDF as this is a case where the parish is really the collecting agency on behalf of the Primate. These are the only two basic exemptions we would suggest but there may be cases from time to time when the diocese may make other exceptions in special circumstances such as the Residential Schools Settlement Fund. Under this proposed system it would be necessary to define exactly what is considered to be a capital expenditure item and to ensure that parishes do not attempt to “hide” funds by stating that they will be used for a capital expenditure item in the future.

If all the above criteria are in place then there should be no reason why a parish is unable to meet its obligations relating to allotment on a timely basis. However, there will always be cases, from time to time, when the circumstances in a parish change dramatically thus causing a marked drop in income during a year when allotment amounts are based on an

income level of two years previously. In those cases there needs to be a pastoral policy for assisting such a parish which does not automatically mean that some level of forgiveness is needed but rather a mutually agreed upon plan between the diocese and the parish to determine how best to deal with this situation.

Turning to the payroll arrears problem we suggest that if the parish configuration is correct then there is no reason why there should be arrears in the payroll. Both the allotment system and the payroll system require monthly review by Synod Office Staff and an immediate conversation with any parish that is not meeting its commitments for either allotment or payroll. Adequate procedures need to be established so that the current high levels of outstanding amounts from parishes are never seen again.

### **Anticipated level of Support**

35. There is strong 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 a successful stewardship education initiative. For some interviewees there is a strong conviction that God is calling the parishes of the diocese to move ahead together...now. 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 stewardship 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.

36. Overall, there is very little understanding and visualizing of the spiritual and financial benefits of an effective regionally-based stewardship plan. Some interviewees described their own parish's attempts to implement a stewardship plan that was not just about money. This is the greatest concern that interviewees expressed about the stewardship education initiative. They expressed their deepest concerns and hopes that a stewardship education initiative would model the right balances within faithful Christian stewardship. There will definitely be a challenge that this is all about money.

37. Of the 30 interviewees who responded to a question about whether their parish teaches proportional giving or tithing, approximately 25% or 8 interviewees stated 'yes' and 70% 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.

38. There are a good number of congregations in the diocese that have experienced very generous responses to the major gifts component of the Leap for Faith capital campaign in their parish. The potential for significant gifts is remarkable. Study participants indicated that their parishes generally do not have enough money for their own ministry and outreach and by having to pay allotment they perceive the diocese as working ‘against us’. For example, parishioners are hesitant about leaving a bequest to operations because of the impact on the allotment. This in turn puts pressure on parish leaders to press constantly for funding support from parishioners.

There are a number of congregations that will soon be looking for assistance with the capital challenges of their own capital campaign. The diocese needs to be ready to provide advice to these parishes.

39. 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 a recognition of the need for strategies to be developed for connecting with key givers. The Leap for Faith Campaign will not generate sufficient funds to sustain the new ministries that are being started. 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 for this plan.

40. The ministry of Charles O’Neil in the area of gift planning (Planned Giving) received high praise from study participants. Charles has done a superb job of raising awareness of stewardship and gift planning. This area has tremendous potential 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 be developed in coordination with Charles. This is to ensure that the Gift Planning Officer receives the appropriate level of support to meet the objectives in fulfilling the gift planning strategies.

## **Proposed Critical Path and Timeline for a Stewardship Resource Development Initiative (SRDI)**

It would be ideal if every congregation participates in the proposed stewardship education initiative but the findings of the study indicate that every congregation is not at the same level of readiness and therefore most congregations will need time to get ready. 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' will 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 rebuild or 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

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

This is an ambitious timeline that will need to be finalized and fine-tuned after further planning with the Management Team and the Stewardship Resource Development Group.

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

1. The stewardship education initiative (SEI) must be designed to fit the characteristics and context of the individual region and its parishes.
2. Building ownership of the SEI 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 SEI will require the highest level of priority in terms of energy, time and finances.
4. The SEI 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 Sue ought to give high level leadership to the SEI and be the official spokesperson for all decisions and announcements.
8. In partnership with diocesan leaders, Letting Down the Nets 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 SEI – 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 SEI 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 SEI with the strong support and leadership of their clergy.

11. The entire regionally-based stewardship education initiative (SEI) 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 initiative 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 initiative (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 initiative 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 a diocesan-wide Vision and strategic 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 initiative 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 (June to September, 2006)**

Major preparations for the launch of the stewardship education initiative (SDI) in January 2007 are conducted during this phase, ensuring that the diocese is prepared for the launch. The Preparations Phase ensures 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
- The organizing of the Stewardship Resource Development Group and development of the organizational infrastructure
- The production of a core SRDG document that outlines the proposed stewardship education program in greater detail
- A feasible, working plan for getting the input and endorsement of Diocesan Executive, clergy and lay leaders
- Begin preparations for the January, 2007 launch

### **Preparation Phase Details:**

- Presentation of the study report to the Bishops for input and approval and recommendations
- Presentation of the study report to the stewardship planning group for input, recommendations and setting of next steps
- Diocesan Executive reviews/revise the proposed organization and infrastructure
- Presentation of an interim or preliminary report to Diocesan Council with outline of initial steps including the date and time for a full presentation of the report to Diocesan Executive
- The Chair and Deputy Chair of the SRDG are appointed and they move to recruit additional members as required with the support of the Bishops
- Management Team/SRDG Chair and Deputy Chair review/revise the stewardship education program plan and timeline and oversee the coordination of the Preparations Phase and the Consultation Phase
- Management Team/SRDG Chair and Deputy Chair assigns the writing and production of the core stewardship education initiative (SEI) document
- Communications plan is developed

- Finalize plan for presentation and consultation to Diocesan Executive and diocesan clergy and lay leaders
- Discussion of initial strategies for implementing the stewardship education initiative (regionally-based)
- Final approval given to core SRDG document
- Question & Answer document produced
- Circulation of core SRDG document
- Presentations developed for Diocesan Executive and clergy
- Position descriptions prepared for all leaders
- Orientation and training of the Stewardship Resource Development Group

<b>Activity Timeline:</b>	<b>Date:</b>	<b>Responsible:</b>
<b>Presentation of the study report to the Bishops</b>	<b>June 12th</b>	<b>Consultant Team</b>
<b>Presentation of the study report to the stewardship planning group</b> to review recommendations, proposed plan, critical path and timeline and finalize presentation to Management Team and Diocesan Executive	<b>June 12th</b>	<b>Consultant Team</b>
<b>Stewardship Resource Development Group Chair and Deputy Chair appointed by Bishops</b>	<b>July</b>	<b>Bishops</b>
<b>Presentation to Management Team</b> of preliminary and initial findings and recommendations and review of study with proposed recommendations for approval including budget and staffing plan	<b>July</b>	<b>Bishops/SRDG Chair</b>
<b>Meet with Archdeacons/Regional Deans (and Bishops)</b> to discuss/consult on SRDG plan, timeline, strategic leadership role, communications.	<b>September</b>	<b>Bishops/SRDG Chair</b>
<b>Key Milestone:</b> Clergy and lay leaders recruited to the Stewardship Resource Development Group	<b>July/August</b>	<b>Bishops/SRDG Chair</b>
<b>Materials (core SEI document and Q &amp; A ) for use in consultation</b> phase finalized by Management Team/SRDG and circulated by mail or email to clergy and Diocesan Executive; invitation to Clergy Consultation Day	<b>August</b>	<b>Management Team/SRDG</b>
<b>Review and finalize strategy for arranging consultations</b> (clergy, archdeacons, regional deans, diocesan committee chairs, key influencers from study)	<b>August</b>	<b>Management Team/SRDG Chair</b>

<b>Meeting of Stewardship Resource Development Group Chair and Deputy Chair with <u>Diocesan Executive</u></b> to review draft plan, timeline, project consultant support, plan for consulting with clergy and diocesan leaders, draft communications plan and organization of SRDG, organizational infrastructure and agreement with LDTN	<b>September</b>	<b>Bishops/SRDG Chair</b>
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## II. CONSULTATION PHASE (October to November, 2006)

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

This phase recognizes three major requirements for a successful implementation of 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 Executive, through this study, achieved the results or consequences as outlined in the stewardship education program.
- 3) Participation must offer leaders the opportunity to make a difference - to identify themselves as program leaders willing to serve on the Stewardship Resource Development Group 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 September Clergy Consultation	<b>September</b>	<b>Bishop &amp; SRDG Chair</b>
<b>Management Team/Stewardship Resource Development Group Meeting:</b> Review plans for consultations, communications plan, draft materials and review agenda for launching at Synod	<b>October</b>	<b>Bishop and SRDG</b>
<b>Clergy Day Consultation</b>		<b>Bishop and SRDG Chair</b>
<b>Key Milestone:</b> Full attendance of the clergy at the Clergy Consultation Day		
<b>Diocesan Executive</b> approves the recommendations and three-year SEI plan and staffing plan and budget and three-year partnership with LDTN	<b>October</b>	<b>Bishop and SRDG Chair</b>

<b>Management Team/Stewardship Resource Development Group Meeting</b> – Review critical path, results of Clergy Day, presentations and plans for Regional Meetings in January and materials for SEI implementation	<b>November</b>	<b>SRDG Chair</b>
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**Consultation Phase Details**

- Finalize the SEI plan and timeline
- Finalize Communications Plan
- Identify people and prepare agenda/materials to be used in the consultations
- Conduct and complete consultations
- Report on consultations to Diocesan Executive
- Prepare for Clergy Day Consultation
- Finalize and approve presentation materials/agenda for January launch
- Confirmation of dates for Regional Meetings
- Training materials for Stewardship Resource Development Group and Sub-Task Groups prepared
- Confirmation of First Stewardship Training Modules

**III. IMPLEMENTATION PHASE (December, 2006 to June, 2007)**

The official launching of the stewardship education program will be planned for a major diocesan event ideally to be held in January or February. A presentation will be made by the Bishops and the Stewardship Resource Development Group. This presentation would give 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. 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 initiative that will include an overview of the results of the study, 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.

A typical parish process for entering into the stewardship education program would include:

- A verbal indication of interest to the Bishops or Archdeacons or Regional Deans
- Appointment of two parish leaders (Stewardship Officers) who would sit on Parish Council

- Attendance at their Regional Meeting
- A written application from the Regional Dean and Parish Councils to the Bishops
- A covenant outlining the goals and objectives the parish leaders are setting for their full engagement in a regionally-based stewardship education program
- A Parish Assessment Survey or Planning Study conducted as needed or appropriate
- Willingness to monitor the parish's progress and meet timelines

<b>Activity Timeline:</b>	<b>Date:</b>	<b>Responsible:</b>
<b>Mailing re. Regional Meetings</b> to all Clergy, Wardens, Synod Delegates, Treasurers, Stewardship Coordinators	<b>December, 2006</b>	<b>SRDG</b>
<b>Management Team/Stewardship Resource Development Group Meeting</b> – preparations for regional meetings	<b>December, 2006</b>	<b>SRDG</b>
<b>SEI 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 initiative</b>	<b>January/February, 2007</b>	<b>Bishops &amp; SRDG</b>
<b>Management Team/Stewardship Resource Development Group Meeting</b>	<b>January</b>	<b>Bishop &amp; SRDG</b>
<b>Key Milestone:</b> All parishes participate in their Regional Meetings		
<b>First Stewardship Training Modules</b> offered to parishes for participation		<b>SRDG</b>
<b>Stewardship Resource Development Group Planning Retreat Weekend</b> to review planning for spring and fall	<b>February</b>	<b>Bishop &amp; SRDG</b>
<b>Consultations held with Parish Councils</b> that have indicated an interest and readiness to participate in their regions stewardship education initiative (SEI) as a pilot project. Parishes covenant as to their goals and their engagement in the regionally-based stewardship education initiative and appoint a team.	<b>March to June</b>	<b>SRDG</b>
<b>Assessment Survey or Planning Study</b> is conducted with parishes ready to move forward with engaging in a regionally-based stewardship program	<b>March to June</b>	<b>SRDG</b>

<p><b>Key Milestone:</b></p> <p>1. 2 regions sign all their parishes for full participation in the stewardship education initiative</p> <p>2. 15 additional parishes attend some of the training modules OR all parishes indicate their participation in at least one module this year</p>		
<p><b>Stewardship Training Modules offered</b> – such as strategic planning preparation, growing your congregation, leadership development, stewardship education, etc.</p>	<p><b>May to September, 2007</b></p>	<p><b>SRDG</b></p>
<p><b>Program evaluation and refocusing</b> – the entire stewardship education initiative is reviewed</p>	<p><b>December, 2007</b></p>	<p><b>SRDG</b></p>

**Implementation Phase Detail:**

- Preparations completed for Regional Meetings
- Development of First Stewardship Training Module(s)
- Regional meetings conducted with full participation
- Full attendance of SRDG 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