Report of the Leadership Development Task Force

TRINITY CHURCH IN THE CITY OF BOSTON • DECEMBER, 2020

Leadership Development Task Force Members

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EXECUTIVE SUMMARY

At Trinity's Annual Meeting in March 2020, our rector, Morgan Allen, announced the establishment of a yearlong Leadership Development Task Force and charged the group with providing recommendations to grow our leadership ranks and support the most impactful and healthiest possible portfolio of ministries. Morgan charged the Task Force to identify the obstacles - conscious, and unconscious - that our ministries set between our opportunities and potential leaders.

Over ten months, through conversations with current ministry leaders, the Task Force endeavored to put its finger on the underlying culture of leadership development at Trinity. We aimed to gain clarity about the spoken and unspoken traditions around leadership; to ascertain the processes for identifying leaders and "leadership potential"; and to assess how these traditions have encouraged, engaged, and inspired some but distanced, alienated, and disillusioned others. This report summarizes our findings and provides some considerations for the Vestry to evaluate - all of which are aimed at building a more open and inclusive beloved community.

Our Process

We began our work with no preconceived notions about what we would find and what considerations we would make. We reviewed prior parish publications, including the past ten years of parish Annual Reports, the 2018 Parish Profile and the 2014 report of the Anti-Racism Team. We compiled a list of Trinity's 67 active ministries through which members offer worship services, govern our church, serve the community, educate adults and children, support one another, and socialize. We then surveyed ministry leaders, asking them to share information about existing leadership roles, opportunities, and barriers. To provide context for the survey results, we undertook a series of interviews with some ministry leaders. Finally, we reached out to a group of 20 innovative church leaders from 14 states to conduct a benchmarking analysis so we could view Trinity in the context of other Episcopal parishes. Together, these shared perceptions helped us forge our aspiration for the Trinity we hope we can become.

Background and History

Our review of prior parish reports made clear that welcome has been a recurring goal at Trinity, but one that has not yet been achieved. And our interviews with ministry leaders revealed a common perception that feeling connected at Trinity can be difficult. We heard, and some of us have experienced, that welcome can feel a bit less warm for parishioners of color. Our surveys of and interviews with ministry leaders conveyed a general lack of understanding about how to start or lead a ministry, how to join a committee, and – once one finds oneself in one of these positions of leadership – how to gracefully transition away. Even as there is a desire to attract new people into leadership, there is still resistance to including people who have not yet "proven" themselves, or those who have not been at Trinity "long enough", resulting in a relatively small group of leaders at Trinity who have served in leadership roles for many years.

Acknowledging the image our parishioners, our leaders, and the church building itself project was a vital step in our Task Force moving toward a new, more expansive vision of our community. We saw that if we, as a parish, truly desire to attract a more diverse congregation and more diversity in our leadership, we will need to consciously and visibly dismantle long-held perceptions by broadening and widening our welcome. If our vision for Trinity is one of a more diverse church body and leadership, then all parishioners must affirm and live into this vision by filling visible positions of leadership with those who represent the future of our parish.

*"Now you are the body of Christ
and individually members of it."*

— 1 CORINTHIANS 12:27

Strategies for Consideration

When we think about the Trinity Church we hope for, we envision a culture in which we all take turns leading and following, stepping up and stepping back as the needs of our community change - ensuring that just as there are no insiders and outsiders in God's family, there are no insiders and outsiders at Trinity.

Reflecting on the themes we heard from ministry leaders, we offer these considerations, intended to move us closer to the culture that we believe is God's hope for Trinity: a place of welcome and inclusion that draws the Kingdom of God closer.

I. Inclusion and Belonging. Acknowledging Equal Claim to the Beloved Trinity Community.

We envision a Trinity culture in which we greet and engage with one another as if we already knew each other - a manifestation of our belief that we are all equally members of our community. *The following* are our ideas for expanding inclusion and belonging so that more, and a more diverse array of parishioners discern a call to lead.

- *Welcome is what we do here.*
- *Everyone does the work of actively becoming an anti-racist parish, as individuals and as a community.*
- *Include youth & young adults more fully in parish decision making.*
- *Support one another.*
- *Make paths to leadership clear.*

II. Invitation and Engagement.

Sharing the Good News of Ministry Leadership. One of our Task Force's underlying assumptions is that conveying the excitement of ministry involvement and growing participation in all of our ministries will help grow the pipeline for future ministry leaders. We heard from our own ministry leaders and leaders of benchmark churches that personal invitation was one of the most compelling and effective ways to grow and diversify the ranks of lay leaders. We propose *the following considerations* for inviting, supporting and connecting ministry leaders regularly, in formal and informal ways.

- *Encourage the whole parish to share in conversation and extend invitations.*
- *Call a ministry leadership staff person.*
- *Connect ministries to our common life.*
- *Support and connect current leaders.*
- *Use online tools to showcase ministries and make them come alive.*
- *Embed ministry milestones in the Announcements portion of each service.*
- *Resume the Annual Ministry Fair.*
- *Conduct a parishwide survey.*

III. Demystifying, Standardizing, and Opening Pathways to Broader Leadership Engagement.

Any attempt to enhance lay leadership development requires a review of the existing leadership roles and access to those roles. Vestry is probably the most recognizable lay leadership body in the parish and its members and officers are customarily elected by the parish after nomination by the Nominating Committee to serve four year terms. The Nominating Committee, in turn, primarily develops its slate of nominees through personal connections and invitations. We learned that Trinity's other ministry leadership roles are populated by volunteers who arrive at ministries through a wide variety of routes for roles that are loosely defined and have no set terms or succession planning. To address these challenges and increase the number and diversity of leaders in our beloved community, we propose *the following considerations.*

- *Adopt uniform governance structures across all ministry leadership roles.*
- *Modify/adopt term limits.*
- *Reduce Vestry terms.*
- *Initiate a "Sabbath period".*

IV. Holding Ourselves Accountable.

We believe that the work of opening up and expanding leadership opportunities to more parishioners is core to the vibrancy of our community and an important way for us to live into our values as a beloved community of God. It's in that spirit that we encourage the Vestry and staff to determine the most urgent and impactful of the considerations we propose, to determine what metrics might be meaningful in monitoring the enactment of those considerations, and to think creatively about what new metrics might need to be developed to ensure that our suggestions have their intended impact. We propose the Vestry consider taking steps that could include: reviewing and sharing the percentage of Trinity leaders who complete their required anti-racism training at each Annual Parish Meeting, sharing progress related to growing the number and types of leaders recruited for various ministries, including Vestry, and ensuring every ministry has written documents that are accessible to all parishioners.

Next Steps for Vestry.

We hope the Vestry will take up, discuss, and eventually adopt, many of our proposals in the near term. Toward that end, we propose *some immediate steps* for the Rector and Vestry to consider.

1. *Prioritize in the budgeting process the hire of a "Director of Ministries/Programs" who will be responsible for supporting and embedding leadership development.*
2. *Create a deadline for the adoption of our considerations.*
3. *Create a timeline for enacting approved considerations.*
4. *Designate a new group for implementing the approved considerations. This new group could develop universal leadership principles, develop job descriptions and establish succession plans, and create a ministry leader orientation to ensure a more uniform experience of ministry leadership and better connect ministries to one another and the entire Trinity community.*

INTRODUCTION

At Trinity's Annual Meeting in March 2020, our rector, Morgan Allen, announced the establishment of a yearlong Leadership Development Task Force and charged the group with providing recommendations to grow our leadership ranks and support the most impactful and healthiest possible portfolio of ministries. Trinity is blessed with an abundance of talent, experiences, and unique perspectives in our pews, yet some of us have had a nagging feeling that there's latent potential within our community that remains untapped. We sense that we do not make full use of this wealth of talent to more actively draw parishioners into ministry and deeper into relationship with one another and, through one another, with God. Morgan charged the Task Force to identify the obstacles - conscious, and unconscious - that our ministries set between our opportunities and potential leaders. Too often the entry points for parish leadership roles are not known, and the expectations for what it means to serve as a leader at Trinity can seem opaque. There is a perception that our ministries are disconnected from one another and operate in silos, without effective coordination or cohesion.

The journey of our Leadership Development Task Force is a familiar one for many Trinity parishioners who have participated in Trinity's

ministries, small groups, and Bible studies - from separate members who didn't know one another well, or at all, to one interconnected team, bound to each other and committed to strengthening the Trinity community we love. Over the volatile months between February and November 2020, sharing and reflecting on our own and one another's reactions to the pandemic and social unrest, we began to hope for an even more loving, open, and inclusive Trinity. Our collective devotion to this vision, along with our commitment to one another, sustained us and kept us focused on hope and healing in the face of a global pandemic and social unrest that at times challenged our hope.

To provide a broad and inclusive perspective on leadership at Trinity, past and present, the Task Force interviewed current and former Trinity staff and parishioners representative of different levels and areas of involvement at the church, including clergy, Vestry members, and leaders and participants of both inward and outward facing ministries. During the course of the interviews, we made note of the many perspectives (real and perceived) of the church, its membership, and its "leaders." Through these conversations, the Task Force endeavored to put its finger on the underlying culture of leadership development at Trinity. We aimed to gain clarity about the spoken and unspoken traditions around leadership, to ascertain the processes for identifying leaders and "leadership potential," and to assess how these traditions have encouraged, engaged, and inspired some but distanced, alienated, and disillusioned others.

In this report, we share what we have learned about our current ministry leadership and we share strategies for engaging a broader, more diverse array of parishioners in leadership positions. We also identify the obstacles that have prevented new leaders from presenting themselves for service or have prevented potential new leaders' acceptance of ministry invitations, and offer best practices and considerations to address these issues.

This report begins with a summary of our Task Force's process for gathering data and provides some background on Trinity's history of leadership development. We then synthesize the feedback we gathered through the surveys, ministry leadership interviews, and benchmarking interviews which provide context to the considerations that follow. We have organized our findings into three sections: Inclusion and Belonging, Invitation and Engagement, and Pathways to Broader Leadership Engagement. We conclude with some strategies for the implementation of our considerations and ways to track and measure progress.

PROCESS AND METHODOLOGY

We began our work with no preconceived notions about what we would find and what considerations we would make. We wanted to learn from the people who lead Trinity's various ministries, committees, and parishioner groups how members became involved and how they currently operate.

Our first task in this effort was to identify the extensive work that our parishioners have been engaged in and continue in throughout the challenges of the current times.

Our Task Force began by reviewing prior parish publications, including the past ten years of parish Annual Reports, the 2018 Parish Profile, the 2015 report of the Mission Task Force, and the 2014 report of the Anti-Racism Team. The prior decade of Annual Parish reports reveal the impressive breadth, and longevity of active ministries at Trinity Church Boston.

We next compiled a list of more than 67 ministries through which members offer worship services, govern our church, serve the community, educate adults and children, support one another, and socialize. We then obtained contact information for the leaders of those groups, where possible. If no leader could be identified, we sought individuals knowledgeable about the operation of the ministry. To make our work more manageable, we divided these ministries into *four categories*, each containing 15 to 18 ministries:

- *Outward-Facing Ministries*
- *Governance and Worship*
- *Music and Formation*
- *Inward-Facing Ministries.*

Task Force members formed teams of two who were assigned to each of the four ministry categories.

To obtain comparative data about all the opportunities for leadership in the various ministries, committees, and parishioner groups, we developed a "Trinity Church LDTF Survey." This short survey requested information about the current level of activity of each ministry, the manner of recruitment of new members, whether there were attributes necessary for participation, the existence of any term-limits or leadership transition plan, and the role of Trinity staff or clergy in their work. We sent the survey to the leaders of all 67 ministries and received 46 responses.

To delve more deeply into existing leadership roles, opportunities, and barriers, and to provide context for the survey results, we next undertook a series of interviews. Pairs of Task Force members selected a group of present and former ministry leaders, long-term ministry members, newer ministry members, and former ministry and committee members. We attempted to reach a racially and generationally diverse array of parishioners who could speak to us from varying perspectives. Through these 16 recorded interviews we heard the suggestions and concerns of deeply committed parishioners about widening opportunities for participation in leadership at Trinity.

As an additional step in our data collection, we reached out to a group of innovative church leaders from across the country to conduct a benchmarking analysis. Working again in teams of two, we spoke with 20 church leaders from 14 states. We were inspired by our conversations with Bishops, Deans, and rectors who graciously shared their thoughts, fears, successes, and challenges so freely and candidly with us. While we learned a great deal about a variety of leadership models, it became clear to us that many of these church leaders are struggling with the same concerns that motivate our work.

We listened intently when ministry leaders shared their perspectives on past and present leadership at Trinity, and when the rectors of other parishes shared their experiences building and expanding lay leadership. We listened with equal attentiveness to the hopes, insights, and perspectives from both ministry leaders and rectors from other parishes. Together, they helped us forge our aspiration for the Trinity we hope we can become. Perhaps the best way to convey this vision is to describe Trinity as one large family, bound together as brothers and sisters serving Christ, serving each other, and serving the world.

For the purposes of our work, the Task Force defines a ministry "leader" as one who:

- *Has primary responsibility for the direction of a specific ministry or program. The ministry leader may also participate in the ministry, but is distinct from participants in that the leader is responsible for recruiting new members, leading regular meetings, scheduling volunteers or participants, and coordinating the ministry's activity,* **or**
- *Serves as a member or officer of an elected or appointed committee such as the Vestry, the Nominating Committee, or a delegate or representative to Diocesan activities (Convention, etc.)*

BACKGROUND AND HISTORY

Trinity's Annual Parish reports from the past decade reveal the array of ministries that have served as sources of vitality and hope, keeping our community engaged and active through several Rector transitions. Yet, our review of the Annual Reports revealed little information about how these ministries came to be or the process by which the individuals listed as the "leaders" came to be so.

At the same time, a review of the Annual Reports reveals a recurring goal: **being more welcoming**. A list of prior annual themes includes "Wider in Welcome", "Warmer in Welcome", "Be Curious, Be Welcoming, Belong", "Known and Loved". The consistent emphasis on welcome reflects Trinity's enduring desire to be a more welcoming community. However, the fact that we have returned again and again to these themes suggests that, as a parish, we have not yet achieved this critical goal. We heard that welcome at Trinity can feel a bit less warm for parishioners of color. Indeed, some of us have experienced this chilliness first hand. Although these realities have profound implications for our broader life together as a parish, they have specific relevance for Trinity's leadership. In its 2014 Special Report examining the history of Trinity Church Boston and "its relationship, or lack thereof, to People of Color," Trinity's Anti-Racism Team observed that "People of Color were not represented on Trinity's clergy or Vestry leaders until the 1970's." Despite Trinity's founding in 1733, a person of color did not serve on Trinity's Vestry until 1983. From the mid-1980s to 2011, only 11 people of color have served as Vestry members, and only one person of color has ever served as a Vestry officer. In 2014, the Anti-Racism Team asked us to face the reality of our past; today, on the cusp of 2021, the Leadership Development Task Force asks Trinity to join us in facing the reality of our present.

"Trinity is great, but finding your way takes a lot of work."

Our interviews with ministry leaders revealed a consistent theme: feeling connected at Trinity can be difficult. One ministry leader told us, "To newcomers, Trinity's congregation can appear to be very educated and well-connected, with all of its leaders already firmly in place." More than one interviewee noted that many outside and within its doors perceive Trinity as primarily a "White church" with very few, if any, parishioners of color. Some ministry leaders shared that even approaching the building itself – a seemingly impenetrable edifice in the middle of a communal, public space – can be daunting. And the coffee hour which is meant to welcome all, instead can intimidate and alienate.

Ministry leaders shared their perceptions that parishioners often find it difficult to know how one can get involved in a ministry. Established groups or ministries within the church can be hard to penetrate, particularly groups that meet regularly and have strong social ties outside of the church. However, even groups without such social cohesion can be oblivious to the image they project. Some parishioners who have felt like "outsiders" for so long have no idea that they are now "insiders" and, as a result, their energies are still directed more toward being included than including others.

In addition, even for those who see themselves as somewhat or fully integrated into the fabric of Trinity, there is a lack of clarity about how to take the next step toward a leadership position. Our surveys of and interviews with ministry leaders conveyed a general lack of understanding about how to start or lead a ministry, how to join a committee, and – once one finds oneself in one of these positions of leadership – how to gracefully transition away.

Trinity's current image of leadership can also create impediments for potential leaders. That image is still one perceived as older, White, very educated and well-connected. Our most recent parish profile (2018) bears this out: "We are 91% white, 71% of us speak English only, 82% of us are 45 or older, and 73% have graduate or professional degrees."

And even as there is a desire to attract new people into leadership, there is still resistance to including people who have not yet "proven" themselves, or those who have not been at Trinity "long enough". There is a perception that, "The unspoken criteria for leadership is age and length of connection to Trinity." Some ministry leaders expressed a sense that service on certain committees has become an unofficial proving ground for Vestry, in which individuals are observed to gauge their "talent," if they have pledged, and if they are willing to commit their time.

Along with the perception that the path to leadership at Trinity is impenetrable, there is also a sense of mystery as to what being a "leader" at Trinity means. What, for example, does being on the Vestry entail? It "seems like a lot of work" was something

need more people of color on our Vestry. If we want to attract more young people with families, we need to do more to encourage young people with families within our congregation to become more engaged. The question our Task Force hopes to address is: How?

FINDINGS & STRATEGIES FOR CONSIDERATION

When we think about the Trinity Church we hope for, we envision a culture in which we all take turns leading and following, stepping up and stepping back as the needs of our community change - ensuring that just as there are no insiders and outsiders in God's family, there are no insiders and outsiders at Trinity.

The considerations that follow intend to move us closer to the culture that we believe is God's hope for Trinity: a place of welcome and inclusion that brings the Kingdom of God closer. Loving each other as true sisters

one ministry leader told us. There is also a sense from ministry leaders that Vestry service requires a large financial commitment, or at least requires ties to those who are financially well off.

Ministry leaders reported that, while the pathway into a leadership role can seem unclear, the pathway to transition out of that leadership role can be just as unclear. One ministry leader summed up what many expressed: there is the fear that "if you volunteer for something, you will do it forever." Thus, both the entry and exit ramps to leadership are obscured for much of the parish, including those now in leadership.

Acknowledging the image our parishioners, our leaders, and the church building itself projects is a vital step in moving toward a new, more expansive vision of our community. If we truly desire to attract a more diverse congregation and more diversity in our leadership, we will need to consciously and visibly dismantle long-held perceptions by broadening and widening our welcome. If our vision for Trinity is more diversity in our church body and leadership, then all members of our community must affirm and live into this vision by filling visible positions of leadership with those who represent the future of our parish. If we want to attract more people of color, we

and brothers requires a shift away from seeing ourselves as attendees, and towards being a beloved community in which each and every parishioner is undeniably part of the family – no matter the service one attends, the ministry one is a part of, one's race, the duration of one's membership at Trinity, how financially secure or insecure, young or old one may be. As one of the ministry leaders we interviewed implored, "Let's look at ourselves, and the ways in which we can bring more people to the table."

We heard from some current ministry leaders who explained that their ministry work can feel isolated and disconnected from other ministries, leaving leaders unsure about their role in the greater Trinity community. So when our Task Force began articulating our hopes, it became clear how important it is for ministries to feel that they are serving as the hands, feet, heart and head of the entire Trinity body. We hope that our considerations will bring greater clarity to how the work of each specific ministry plays a part in building one Trinity community so that parishioners identify less with a specific ministry, and more as one part of the whole - part of a growing family that's always seeking to adopt another brother or sister.

"...a place of welcome and inclusion that brings the Kingdom of God closer."

I. INCLUSION AND BELONGING:
Acknowledging Equal Claim to the Beloved Trinity Community

Inclusiveness: We all have equal claim to our community

We envision a Trinity culture in which we greet and engage with one another as if we already knew each other - a manifestation of our belief that we are all equally members of our community. Our vision is one in which each of us is standing with hands perpetually outstretched, ready to reach out to one another and welcome new members.

Considerations for Inclusion and Belonging:

Welcome is what we do here. The commitment to welcome reflected time and again in Trinity's Parish Profiles should not only endure, we should double down on it. We envision a community in which everyone not only feels welcomed but also feels equally empowered and committed to welcoming others. We realize a spirit of welcome cannot be compelled, but must be modeled again and again. We hope this culture of welcome brings us all closer together and, in turn, will help us grow our ministry ranks, foster greater connectivity between and among our ministries, and cultivate new ministry leaders.

Everyone does the work of actively becoming an anti-racist parish, as individuals and as a community. The culture we want to create at Trinity requires a commitment to broad and ongoing anti-racism education, conversation, and action. When asked about how to increase a sense of inclusiveness at Trinity, the ministry leaders we talked with agreed that anti-racism training would be valuable for both ministry leaders and participants. One ministry leader explained, "I wish we could all be playing a role [in anti-racism work]. I would like to see an expansion of anti-racism work, perhaps spinning off smaller groups from the Anti-Racism Team." Other ministry leaders expressed support for current anti-racism work but stated, "we all need to be more active." This observation echoes the Task Force's belief that anti-racism work is a responsibility shared by all, rather than delegated to a few.

Include youth and young adults. In addition to explicitly addressing racism, our conversations with ministry leaders revealed interest in engaging and elevating young parishioners, from confirmands to young adults in their 20s and 30s. The teenagers who are already part of the Trinity community should be invited to participate fully in the ministries of the parish, including but not limited to the offerings of our youth ministry program. More active outreach to the young people in our community - including opportunities to help them navigate the challenges of growing into adulthood - will bring new energy to Trinity. As one leader put it, "younger voices have fresh perspective." Another ministry leader

suggested that "20s/30s could build mentorship relationships to connect younger parishioners with older parishioners." And another leader proposed establishing a newcomers group that was aimed at young people.

Support one another. One ministry leader told us, "I would have benefitted from having a mentor when I arrived - one specific person I could ask questions of, who will call you, from whom you can get feedback." Giving parish leaders the opportunity to support one another can strengthen those in leadership, while creating a stronger sense of community and partnership.

Make paths to leadership clear. Several ministry leaders shared a sense that parishioners can feel confused about how to get into any leadership role. We heard people say they want a way to journey together. As one parishioner noted, "If you're not already in the club, you don't feel like the club really wants you. Some of this would be helped by a welcoming attitude and some by making it easier to find information and making ministries known." Parishioners need to be shown the different opportunities to serve at Trinity, and understand how they can participate or lead. One of the rectors we interviewed spoke about watching parishioners' "belief come through engagement." He described a focus on nurturing individuals and addressing why people are in church in the first place: to belong as disciples of Christ. Trinity must present a clear and welcoming path to engagement that supports our vision of a community that is not divided among "insiders" and "outsiders", but rather one in which all feel they have equal voice, agency, and commitment.

II. INVITATION AND ENGAGEMENT:
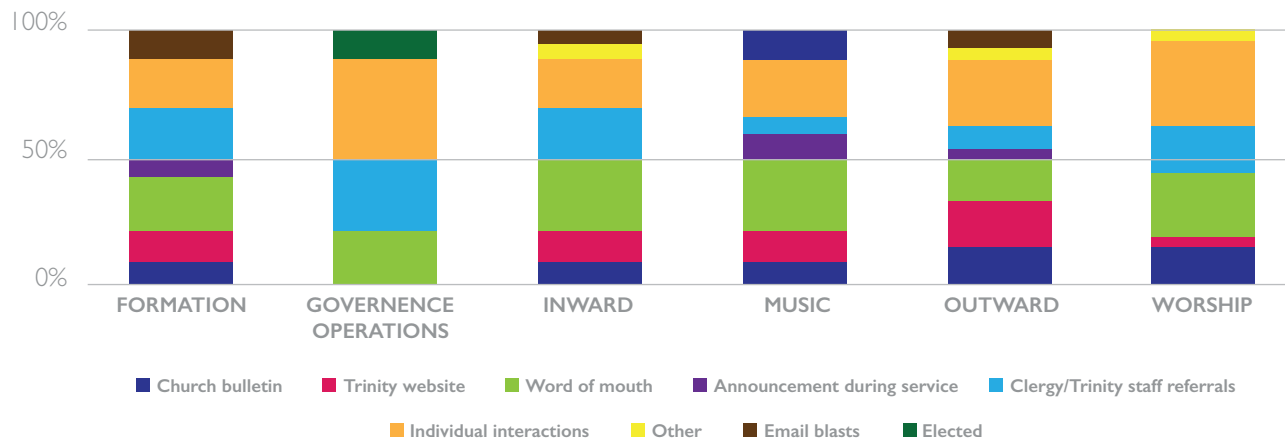### Sharing the Good News of Ministry Leadership

As discussed above, in order to make Trinity more welcoming and inclusive, we believe it is important that there be robust efforts to get more people involved in ministry activities. In speaking with fellow parishioners, however, we found that there was a great deal of confusion about how to become involved. There was a sense that many parishioners didn't know with whom to speak when they were interested in a particular ministry. Some people wondered if a personal invitation was required to join certain ministries. We heard repeatedly that the process for connecting with ministries was not transparent or uniform. One person acknowledged that the engagement process was only clear to people who were already participating in their ministry. Many ministry leaders could not articulate what the process is for engaging in ministries—even their own. The chart below summarizes survey responses from ministry leaders about recruitment for their ministries.[1]

As the array of colors indicates, the manner in which Trinity's ministries recruit is highly variable. All rely on a combination of pathways, including the Sunday worship booklet, Trinity website, word of mouth, announcements from the Broadstep, referrals from Trinity staff, individual interaction with other parishioners, direct email solicitations, annual elections, and other non-specified modes. This lack of consistency from ministry to ministry leads to confusion.

The lack of a clearly articulated, uniform system for inviting people to participate and for helping them engage as leaders in Trinity's ministries contributes to this confusion. One ministry leader admitted that beyond the occasional personal invitation, ministry recruitment at Trinity was "unusual." Another said finding new volunteers who hadn't been individually invited to participate in their ministry was "rare." The church no longer holds a "Celebration Sunday" annual ministry fair where people can learn about ministry activities and express their interest. Information about ministries and methods for getting involved can be hard to find on the church website and in bulletins and newsletters. Because there is little emphasis on invitation into ministry activities, some leaders worried that parishioners, especially people who are new to the church, assume that Trinity has all the ministry leaders it needs. In reality, many ministries struggle to fill their leadership positions year to year. People who are inherently outgoing or motivated to become involved in particular ministries find a way in, but as one ministry leader said, Trinity should "find ways to open things up to people (who are) not as outgoing or proactive."

(Responses to Ministry Leader Survey: Recruitment Methods)

Legend: Church bulletin, Trinity website, Word of mouth, Announcement during service, Clergy/Trinity staff referrals, Individual interactions, Other, Email blasts, Elected

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[1] **Formation** ministries include: Bible Studies, Education for Ministry (EfM), Faith Fundamentals, Children's Ministries, Youth Ministries, Short Fiction on Faith, Pilgrimages, Anne Bonnyman Symposium, Price Lectures, **Governance/Operations** ministries include: Vestry, Delegates to Diocese, Stewardship Committee, Nominating Committee, Finance Committee, Investment Committee, Budget Committee, Audit Committee, Building Committee; **Inward-Facing** ministries include: Needlepoint Guild, Hardy Perennials, Anti-Racism Team, Community Life, Art & Architecture, LGBTQ Fellowship, Nigerian Fellowship, 20s and 30s Fellowship, Stitching in the Spirit, Prayer Chain ministry, Cancer Support Group, Bereavement and Beyond, Pastoral Visitors; **Music** Ministries include: Trinity Choir, Choristers, Evening Service Choir, Trinity Concert Series, Hallelu Singers; **Outward-Facing** ministries include: Tour Guides, College Behind Bars, Boston Warm Team, Rosie's Place Catering Team, Pine Street Inn Feeding Team, Boston Deanery, Episcopal City Mission, Yearwood House, Sunday Night Living Bread, Walk for Hunger Team, St. Mary's Food Pantry, Habitat for Humanity, Trinity Climate Action Network, Louis D. Brown Peace Institute Mother's Day Walk for Peace, Global Companion Parish, Greater Boston Interfaith Organization, Trinity Refugee Ministry, Harbor to the Bay Ride; **Worship** ministries include: Altar Guild, Flower Guild, Usher Guild, Lay Eucharistic Ministers, Lay Eucharistic Visitors, Acolytes, Robert Treat Paine Society.

Considerations for Invitation and Engagement:

Encourage the whole parish to share in conversation and extend invitations. Personal invitations are powerful. We heard from ministry leaders and leaders of benchmark churches that personal invitation was one of the most compelling and effective ways to grow and diversify the ranks of lay leaders. As one rector of a benchmark church advised us, "Invitations should emphasize that ministry is not an extension of one's day job, but a way to offer one's gifts to God and your brothers and sisters." Being invited into ministry leadership - not solely by clergy and staff, but by one another - conveys a sense of being known, seen, valued, and needed by Trinity's beloved community. Being invited can provide a vote of confidence that validates and acknowledges the unique gifts that parishioners have to offer, drawing them closer into the Trinity community. The experiences of Task Force members and those shared by several of the ministry leaders we interviewed revealed that many had been "called" into leadership positions they hadn't anticipated or envisioned for themselves by clergy, staff, and other parishioners.

• *Encourage the whole parish to share in conversations and extend invitations.* To avoid the sense there is an inner circle, or an unwritten trajectory towards leadership roles at Trinity, we hope that all parishioners will feel empowered to invite parishioners who they know have gifts to offer, especially those who are newer to the community and those who haven't yet served in leadership roles. In this spirit, we hope all parishioners will recognize the renewed energy that comes with the gifts and interests that new parishioners bring. For governance roles, we propose that the Nominating Committee chairs serve as a repository for nominations of new leaders throughout the year, providing frequent reminders to parishioners to think about and proposing names of promising new leaders.

• *Call a ministry leadership staff person.* In addition to building a culture of welcome, perpetually inviting parishioners into ministry and leadership roles, we suggest Trinity consider hiring a staff person - Ministry Coordinator or Director of Programs - who can serve as a hub, connecting ministries to each other and the whole Trinity community. This staff person would support parishioners as they consider ministry leadership roles for themselves and for others by sharing information about the needs for ministry leadership roles, and practical information like job descriptions and terms. In the same way that Nominating Committee chairs can serve as a storehouse of names of potential governance leaders, this ministry leadership staff person can gather parishioners' hopes for ministry leaders, make connections to existing ministries, and identify emerging opportunities for new ministries and programs.
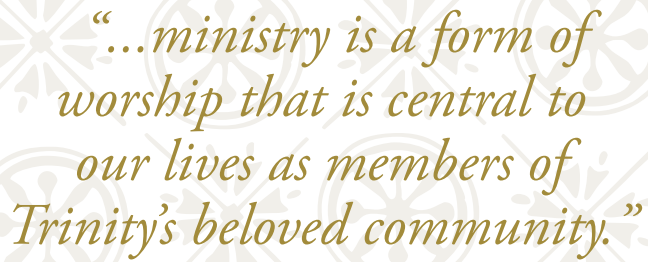
Strengthen Support for Leaders and Connections Across Ministries. Currently, no single staff person or parish group has a birds-eye view of the activities of the ministries across the entire parish. Our interviews with current ministry leaders revealed that some feel isolated and unsure how their work connects to the life of the parish. We propose supporting and connecting ministry leaders regularly and in formal and informal ways.

• *Connect ministries to our common life.* If we are going to realize our Task Force's vision of weaving ministry work into the fabric of our Trinity family, then it follows that parish leaders would model these connections and support them. We propose that the Vestry consider creating regular opportunities for Vestry members to connect with ministry leaders and listen to the successes, challenges, accomplishments, and needs of ministries so that leaders are more deeply connected to the work of each other and see their centrality to the purpose of our whole beloved community.

• *Support and connect current leaders.* We heard from some ministry leaders that they would appreciate more support and a better sense of what other ministry leaders do in their roles. We envisioned a sort of "ministry leader mixer" that might happen at the beginning and end of each program year. The mixer would be part cocktails and conversations, part training in Trinity's leadership principles, and part dissemination of helpful information relevant to all Trinity's ministry leaders. At the mixers, newer and more seasoned ministry leaders could be matched up and provided with time to get to know one another and share experiences. This time could also be used for Trinity's ministry staff person to share templates for job descriptions and other protocols that would help unify ministry leadership expectations across all of Trinity's ministries.

Share information broadly and via multiple modes. One of our Task Force's underlying assumptions is that conveying the excitement of ministry involvement and growing participation in all of our ministries is a way of creating a pipeline for future ministry leaders. Sharing information about the exciting work of our ministries online and in person would prompt parishioners to continuously ponder leadership roles for themselves and others. Suggested strategies to accomplish this could include:

"...we hope all parishioners will recognize the renewed energy that comes with the gifts and interests that new parishioners bring."

"…ministry is a form of worship that is central to our lives as members of Trinity's beloved community."

• *Use online tools to showcase active ministries and make them come alive.* One relatively simple way of highlighting ministries is to feature one ministry each week in Trinity online publications. These features could include photos of the ministry in action, a brief video clip from a volunteer, or video footage of the ministry at work. These features might also include stories or profiles of ministry leaders - how and why they became involved in this ministry and the ways their involvement has fulfilled them. Trinity's website is another important tool for enticing parishioners and already includes valuable information about the inspiring array of ministries available. But ministry leaders described that it can still be hard to know how to engage initially when exploring Trinity's website. Does one email the ministry point person listed on the web page? Is there a separate mechanism for volunteering more broadly? The website could provide simple instructions to help interested parishioners quickly and easily volunteer. One leader of a benchmark church described using her website as a tool to provide chutes and ladders for each ministry, inviting parishioners to share their interests and then guiding them toward ministries that might fit best with those.

•*Embed ministry celebrations and milestones into the "Announcements" portion of each Sunday service.* To make the work of ministries more central to the life of the entire community, the Broadstep announcements could include a brief mention of the work of one or two ministries. We view this as a brief shout-out; for example, "The Habitat for Humanity Team completed a house for the Parker family this week!" Or, "The College Behind Bars team visited with 23 inmates this week!" These types of announcements already occur on an ad hoc basis, but what we envision is a systematic holding up of each ministry's work each Sunday of the year. The goal of these announcements would be similar - to give the whole parish the opportunity to lift up to God and rejoice together in our ministry work. While these celebrations would undoubtedly serve as a means for recruiting new members, the announcements would be less about direct recruiting and more about enhancing the sense of everyone's ownership of ministry work - ultimately helping to unify our sense that ministry is a form of worship that is central to our lives as members of Trinity's beloved community.

• *Resume the Annual Ministry Fair.* We heard from both our own ministry leaders and rectors of benchmark churches that ministry fairs can serve an important role in informing parishioners about the array of ministries available. The ministry fair is also a way of celebrating ministry work with the full parish community. Our Task Force acknowledged that a Ministry Fair may not be the most effective way to recruit new members, but we agreed that recruiting need not be its primary purpose. Instead, we viewed the Annual Ministry Fair as an important way to affirm current leaders and signal that ministry work is central to the life of our Trinity family.

• *Conduct a parishwide survey.* One of the comments we heard from our ministry leader interviews and informal conversations with other parishioners is that there is so much talent at Trinity, but it doesn't seem to be fully tapped. We also observed that it was hard to know how to share innovative ideas for new ministries. The Vestry could consider having a parishwide survey that would allow parishioners to share their experiences and ideas. It could serve as a potential source of inspiration for current ministries and an impetus for gauging interest in starting new ministries.

III. Demystifying, Standardizing, and Opening Pathways to Broader Leadership Engagement

Any attempt to enhance lay leadership development requires a review of the existing leadership roles and access to those roles. Opportunities to access leadership roles at Trinity through its Vestry, standing committees, ad hoc committees, ministries, and parishioner groups are governed to a varying extent by Trinity's Bylaws, Vestry policy, tradition, personal interaction, and necessity.

Understanding Trinity's Vestry: Qualities, Expectations, Terms. The Vestry is probably the most recognizable lay leadership body in the parish. Its authority is articulated in the Canons of the Episcopal Church and the Episcopal Diocese of Massachusetts, while Trinity's By-laws govern its particular shape and structure, such as its general duties, election, and terms of office. Under the By-laws, Vestry members and officers must be eighteen years of age and members of Trinity for at least one year prior to election. To become a "member" of Trinity, a person must declare "an intention to regularly attend" church and "to support the parish by financial aid." While the By-laws are silent as to what is meant by financial aid, the Vestry passed a resolution articulating that "pledging" is what is meant. The Trinity webpage entitled "Lay Leadership Positions for Election," contains a fuller and more specific statement of qualities deemed important for Vestry members. Future Vestry members must be "faithful and steadily present in Sunday worship"; have "a deep commitment to the Christian faith...and church ministry"; "be a proportional, pledging member of the parish"; and "manifest leadership abilities and commitment within the parish..."

The By-laws also state some of the demands on and expectations of a Vestry member. Vestry members and officers (the wardens, treasurer and clerk) are customarily elected by the parish after nomination by the Nominating Committee. While parishioners may place names in nomination from the floor during the Annual Parish Meeting (APM), this is rarely done, as it can subvert the purpose of the nomination and discernment process - preventing the parish from coming to know the nominees in preparation for the APM. The election process and the terms of office are specified in the By-laws. The By-laws also provide for the election of delegates to the Diocesan Convention and to the Boston Harbor Deanery. Vestry members are elected for one four-year term and must leave the Vestry at the expiration of that term. Officers may serve two consecutive four-year terms. Delegates are permitted one one-year term, however, in practice, a delegate may be elected as an alternate delegate for one year before being elected as delegate.

At Trinity, Vestry members who have served a full four-year term do not serve on the Vestry a second time. This is the practice despite the fact that the By-laws do not forbid former members from serving again. The By-laws only require that after completing a four-year term, the Vestry member must leave the Vestry for at least one year before they can be reelected. In practice, Trinity has avoided repeat service without regard to the amount of time that passes after a Vestry member's term expires.
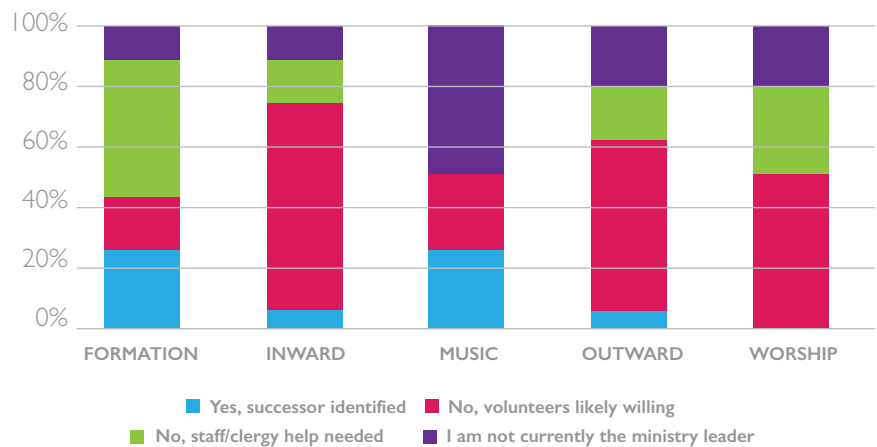
Other Governance Roles and Committees. Governance committees like Nominating, Investment, Audit, Finance, Building, and Stewardship provide other operations-related leadership opportunities for parishioners. Like the Vestry, the By-laws prescribe that the Nominating Committee must comprise at least three members of the parish as well as the rector and at least two officers. The Vestry appoints the parish members who serve one-year terms, which may be extended to up to three years. According to the By-laws, after serving for three years, Nominating Committee members are eligible to serve again after a hiatus of at least one year. Traditionally, members serve for up to three years, but do not later serve again. Also, while the Vestry may be the official appointing authority for the Nominating Committee, its members have sometimes been recruited by clergy. The By-laws state the specific time parameters of the work of the Nominating Committee. Although there is no written list of expectations or a job description, committee members are made aware of what is expected of them through a new member orientation.

Members of other governance committees serve a variety of terms ranging from as short as two years to as long as six years in the case of the Investment Committee, although in most instances there is no explicit term limit. Members of these committees are called

in varying ways: some by word of mouth, many through individual interaction with current committee members, and some recruited by clergy or staff. If a committee has officers, they are appointed by staff or clergy. Most of these committees have provided specific information to new members about what is expected of them, and a few provide job descriptions. Most believe there are particular attributes that would be useful for new committee members to possess, but they differ on whether new members are recruited based on those attributes.

Ministry Leaders: Recruiting, Expectations, Terms. Although there are variations, the governance of and recruitment to Trinity's ministries and parishioner groups differ significantly from that of the Vestry and governance committees. As detailed above, an election process controls Vestry membership, while members are called to governance committees primarily through personal interactions. Through the surveys, we learned that ministry leadership roles are populated by volunteers who arrive at ministries through a wide variety of routes. Some parishioners respond to personal invitations, others are called by notices in the bulletin and emails. Announcements during services can cultivate interest as well as referrals by Trinity staff. Word of mouth also has a major impact on the recruitment of ministry participants.

There are no set terms of office for ministry leaders or participants. In some instances, there are no designated ministry leaders. Since succession planning is absent in most ministries, as our survey below revealed, ministry leaders sometimes feel stuck in their positions. Leaders described feeling obligated to find their own replacements, and feeling unable to leave their posts until they do. On the other hand, we heard from leaders who do not wish to exit their leadership roles, ever. Where leaders do not move aside, the growth of less experienced ministry participants can be stymied and the ministries, and by extension our beloved community, loses the benefit of a refreshed and varied leadership pool. *(Footnote 1 lists ministry groupings.)*

(Responses to Ministry Leader Survey: Ministry Succession Planning)

Legend:
- Yes, successor identified
- No, volunteers likely willing
- No, staff/clergy help needed
- I am not currently the ministry leader

Another striking difference between ministry leaders and leaders of governance committees is the absence of job descriptions for ministry leaders. While the Vestry and most standing committees provide guidance to new members about the nature of their responsibilities, ministries and other parishioner groups do not routinely provide standardized guidance to members about the expectations of their service. In addition, our surveys and interviews showed us that staff and clergy support for ministries varies widely. Some ministries share the oversight of a single member of the clergy with numerous other ministries. Other ministry participants say they currently have all the staff support they need. This point is not to suggest that staff or clergy support for all ministries is necessary or possible. However, for some ministry leaders and participants, there is an expectation that staff or clergy support will be readily available to them. This can create a sense of a hierarchy in which those ministries with a clergy or staff member assigned are insiders, and those without are outsiders.

How Trinity Compares to Benchmark Churches. In our conversations with church leaders of twenty benchmark churches, we learned that almost all of these churches employed the Nominating Committee process for the election of Vestry members, rather than open contested elections. We also share these benchmark churches' practice of imposing term limits on Vestry members and officers. Where we differ with our peers is the length of those terms of office. Among the churches we consulted, Trinity's four-year term was the longest term currently in place. Within this group of twenty churches and cathedrals, Vestry terms of office ranged from two to three years. Some terms were renewable and others were not. There were a few in which particular officers were not subject to the same term limits, but that was rare.

Trinity is even more of an outlier when we consider other parish leadership roles. Our peer institutions apply term limits to leadership positions in committees and ministries as well as the Vestry. More often than not, those leaders are subject to the same term limits as the Vestry and officers. One rector explained that she "emphasized establishing term limits [for committee and ministry leaders] so that people don't feel obligated to lead ministries forever." Another rector shared that a problem can arise when a ministry becomes "captive" to a small group of parishioners. Turnover and term limits can help avoid this. "Limit terms for everything" was the advice given to us by another clergyperson we interviewed.

Regarding the healthy turnover of leadership roles, one clergyperson we interviewed described a practice of "taking a Sabbath year." In this congregation, ministry leaders are able to serve their leadership roles for only two consecutive three-year terms. After six years, the leader is required to take a "Sabbath year." The leader then steps down from their leadership role in the ministry for at least one year. The clergyperson explained a compelling rationale for this requirement: "Beyond six years, the ministry can become the ministry of the leader, rather than the ministry of the congregation."

Considerations for Governance:
Adopt uniform governance structures. To prevent confusion and provide consistency, we propose that all of Trinity's lay committees and ministries - from formal committees like the Vestry to leaders of outreach ministries - adopt the same uniform governance structures to identify and define leadership roles. All of Trinity's ministries and committees should provide job descriptions and set term limits for their leaders, and create a process to transition to new leadership. Putting these practices in place will attract new leaders, better support existing leaders, and lessen the current opaqueness and mystery regarding how Trinity's committees/ministries operate.

"Beyond six years, the ministry can become the ministry of the leader, rather than the ministry of the congregation."

Modify/adopt term limits. In order to engage a broader, more diversified array of parishioners in leadership, it is essential that leadership opportunities become available on a more frequent, regular basis. We propose a specified term limit of less than four years for all ministries and governance committees, including the Vestry.

The process for identifying new leadership should begin no later than the start of the last year of a leader's term so that the appropriate mentoring and training of the new leader can take place. A leader whose term ends may opt to step out of a leadership role but continue as a participant in that ministry if he or she so chooses.

Reduce Vestry terms. The terms of Vestry members, including the Officers (Wardens, Treasurer and Clerk), should be reduced from the current four years. In our conversations with the leaders of benchmark churches, Trinity was the only one with a four-year term. The clergy with whom we spoke described the benefits of shorter terms: positions open more frequently, enabling more parishioners to take a turn serving on Vestry; those who serve feel greater ownership of the community; and Vestry service becomes a more reasonable role for those with other responsibilities (e.g. those with young families, demanding day jobs, etc.). These clergy described an overall sense that term limits helped to increase the vitality of their congregations.

After completing their term, we envision that former Vestry members may serve an additional term either consecutively, or later in life. For example, the Vestry may reduce its term to three years, but permit members to serve two consecutive terms for a total of six years. Alternatively, the Vestry may opt to permit its members to serve only one three-year term with the possibility of reelection to a second term after a specified number of years. The Vestry could also choose to set a three-year term for Vestry members, but a two-year term for Officers. The hope is that reduced terms would enable the parish to benefit from more parishioners being invited to discern a call to Vestry, while still allowing for continuity and stability.

Initiate a "Sabbath period." Following six years of service as a committee or ministry leader, we propose that leaders observe a "Sabbath period" where the former leader steps away from leadership (but not necessarily away from membership in their ministry) and observes a time of rest and reflection. This period should be at least one year, and should include engagement with clergy or staff to help discern where the parishioner might next be called to serve. At the conclusion of this "Sabbath period", the person is eligible to serve again as a leader on any committee or ministry, subject to the term limits outlined above.

IV. HOLDING OURSELVES ACCOUNTABLE:
Measuring What Matters

The work of this Leadership Development Task Force was to examine Trinity's leadership challenges and suggest strategies to bring a greater number and greater diversity of Trinity's parishioners into leadership roles. As we came to consensus about our ideas and concluded our work, it was important to us to address questions about how our suggestions might be acted on, and how Trinity could monitor

progress towards our goals. We see the work of opening up and expanding leadership opportunities to more parishioners as core to the vibrancy of our community and an important way for us to live into our values as a beloved community of God. It's in that spirit that we encourage the Vestry and staff to determine the most urgent and impactful of the considerations we propose, to determine what metrics might be meaningful in monitoring the enactment of those considerations, and to think creatively about what new metrics might need to be developed to ensure the intended impact on the community.

We hope that the Vestry will consider efforts to monitor, measure, and report out to the entire Trinity community signs of progress on the considerations it chooses to undertake. Possible next steps could include the following:

1. *Review and share the percentage of Trinity leaders who have completed their required anti-racism training at each Annual Parish Meeting.*
2. *Share progress related to growing the number and diversity of our leaders recruited for various ministries, including Vestry, to ensure that our leadership reflects the needs of the community and our aspirations as a parish community.*
3. *Ensure every ministry has written documents that are accessible to all parishioners and include: a ministry description, job descriptions for leadership, clarity on term limits, and a process for nurturing new leadership through succession planning.*

With the support of the Rector, the Director of the Rector's Office, and a potential new "Director of Programs", we hope that the Trinity community will also incorporate these measures aimed at ensuring pathways to ministry leadership roles are clear and open.

- *In addition to tracking ministry membership, consider an "active attender" as a way to measure the number of people actively engaged with Trinity's various ministries.*
- *If Trinity makes a financial commitment to lay leadership training, track the number or percentage of individuals who attend conferences, trainings, etc., on an annual basis.*
- *Perform baseline and annual surveys to track parishioner knowledge of leadership pathways and opportunities.*
- *Collect qualitative information about the path to leadership roles: how long did it take for someone to go from the "parking lot to the Vestry"?*

NEXT STEPS: FOR THE VESTRY'S CONSIDERATION

Our Task Force has significant interest in continuing the momentum of our efforts and we hope the Vestry will take up, discuss, and eventually adopt, many of our proposals in the near term. Toward that end, we provide *some immediate steps* for the Rector and Vestry to consider.

1) *Prioritize in the budgeting process the hire of a "Director of Ministries/Programs" who will be responsible for supporting and embedding leadership development as a central aspect of the life of our beloved community.*
2) *Create an internal deadline for consideration of our recommendations and approval of those deemed important.*
3) *Create a timeline for enacting those considerations that are prioritized and approved.*
4) *Designate a new group for implementing the approved considerations. This new group could take responsibility for developing leadership principles that reflect Trinity's beloved community, working with current ministry leaders to develop job descriptions and establish succession plans, and creating a ministry leader orientation (fall) and celebration (spring) that would ensure a more uniform experience of ministry leadership at Trinity and better connect ministries to one another and the entire Trinity community.*

CONCLUDING PRAYER

O Lord God Almighty, we offer you thanks for the chance to work, for the opportunity to create and add value, in the hope of improving our beloved Trinity Church, and improving the quality of our, our clergy's, and our fellow parishioners' church life.

We are thankful for this moment of solid achievement, for the ability to produce, for the opportunity to serve others' needs, for the opportunity to learn and grow.

We are grateful for previous generations of task forces and committees who laid the foundation for us, for the interviews and interactions that have educated us, for all of those who contributed their time and shared freely of their thoughts, experiences, knowledge, and hopes.

We have relished this chance to deepen our relationship with one another, this space to be open to each other, this time to be present and PRESENT on Sunday mornings, this shared journey that has enlightened, energized, inspired, soothed, and sustained us for the past ten months.

O Lord accept our thanks.
Amen.

*"Now there are varieties of gifts, but the same Spirit;
and there are varieties of services, but the same Lord;
and there are varieties of activities, but it is
the same God who activates all of them in everyone.
To each is given the manifestation of the Spirit
for the common good."*

Appendix 1 - List of Benchmark Churches

Christ Church Cathedral
Indianapolis, IN
246 (Average Sunday Attendance)
$64,868 (Plate & Pledge)

Church of the Heavenly Rest
New York, NY
1,131 (Average Sunday Attendance)
$6,608,769 (Plate & Pledge)

Cathedral of St. James
Chicago, IL
305 (Average Sunday Attendance)
$831,263 (Plate & Pledge)

St. Mark's Church
Philadelphia, PA
270 (Average Sunday Attendance)
$586,771 (Plate & Pledge)

St. Bartholomew's Church
New York, NY
867 (Average Sunday Attendance)
$5,266,953 (Plate & Pledge)

St. Paul's Episcopal Church
Cleveland Heights, OH
345 (Average Sunday Attendance)
$1,562,157 (Plate & Pledge)

Parish of the Epiphany
Winchester, MA
241 (Average Sunday Attendance)
$822,698 (Plate & Pledge)

Epiphany Episcopal Church
Seattle, WA
387 (Average Sunday Attendance)
$1,329,674 (Plate & Pledge)

St. Paul's Cathedral
San Diego, CA
413 (Average Sunday Attendance)
$1,181,247 (Plate & Pledge)

St. Michael's and All Angels
Portland, OR
491 (Average Sunday Attendance)
$1,650,151 (Plate & Pledge)

St. John the Evangelist
San Francisco, CA
53 (Average Sunday Attendance)
$169,004 (Plate & Pledge)

Church of the Holy Communion
Memphis, TN
359 (Average Sunday Attendance)
$1,693,278 (Plate & Pledge)

Christ Church
Charlotte, NC
687 (Average Sunday Attendance)
$5,426,887 (Plate & Pledge)

St. James' Church
New York, NY
247 (Average Sunday Attendance)
$2,260,835 (Plate & Pledge)

Episcopal Diocese of Atlanta
Atlanta, GA
56,000 members of 96 parishes

St. Mark's Cathedral
San Antonio, TX
411 (Average Sunday Attendance)
$1,833,895 (Plate & Pledge)

St. Martin's Episcopal Church
Houston, TX
1,700 (Average Sunday Attendance)
$12,684,842 (Plate & Pledge)

Christ Church Cathedral
Houston, TX
2,436 (Average Sunday Attendance)
$16,496,765 (Plate & Pledge)

St. John's Cathedral
Denver, CO
606 (Average Sunday Attendance)
$1,529,866 (Plate & Pledge)

Appendix 2: Survey questions, available upon request

Appendix 3: Interview questions, available upon request

Appendix 4: Interview Questions to Benchmark Clergy, available upon request