

# TASK FORCE TO STUDY CONGREGATIONAL VITALITY

## INDICATORS

### Members

The Rt. Rev. C. Andrew Doyle, Chair	Texas, VII,	2024
Mrs. Kate Bond, Secretary	Oklahoma, VII,	2024
Mrs. Michael Funston	Kansas, VII,	2024
Mr. Stephan Griffin	Massachusetts, I,	2024
The Rev. Sunny Hallanan	Convocation of Episcopal Churches in Europe, II	2024
The Rev. Debra Maconaughey	Florida, IV,	2024
The Rev. Dr. Deacon Laura Natta	California, VIII,	2024
Ms. Phillips Smith	East Carolina, IV,	2024
The Rev. Dr. Angela F. Shepherd	Atlanta, IV,	2024
The Rev. Juan Valderrama	Colombia, IX,	2024
Ms. Ayala Harris, Ex Officio	Oklahoma, VII,	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV,	2024

### Mandate

The House of Deputies Committee on the State of the Church proposed to General Convention 2021, A132, which was adopted by both houses and created the “Task Force to Study Congregational Vitality Indicators.” The mandate was to work closely with the Task Force on the State of Membership in the Episcopal Church (A156) and the House of Deputies State of the Church Committee. The mandate was also to coordinate with the House of Deputies Committee on the State of the Church to ensure that the parochial report form is revised to collect data from congregations that will measure vitality in the 21st century. Finally, the task force was to issue a report to the 81st General Convention that includes proposed canonical changes to codify the proposed measurements.

### Summary of Work

The Task Force introduced itself online and prepared for our meeting at the Maritime Institute and Conference Center. The Task Force met in person on April 24-26. At that meeting the following studies were discussed: the history of the Parochial Report, the history of Canon 5, the history of General Convention actions that referred to the term “vitality” and the recommendations of previous reports

to the State of the Church Committee and General Convention. An understanding of the process of developing the present parochial report questions was understood. The Rev. Molly James, from the General Convention Office, attended and spoke with members regarding possible changes to the report. The committee finished its time in Maryland by drafting a report. The Task Force spent the remaining time online using Teams to fine tune the report in connection with data received from two other task forces on membership and finances, and The Committee of the State of the Church.

## Report

The interim body Task Force to Study Congregational Vitality Indicators is not the first Episcopal Church entity tasked with determining what is “congregational vitality” and what are its indicators. This task force, and its related interim bodies, is given the responsibility of bringing forward history and recent conversation regarding the nature of the vitality of the Episcopal Church and to make suggestions in the form of a report and resolutions to be considered at the 181st General Convention of the Episcopal Church, meeting in Louisville Kentucky in 2024.

### **History of the Parochial Report:**

In the wake of the Revolutionary War, the emerging Episcopal Church had a great concern regarding the funding of mission. The Anglican Church in the colonies had been funded through the office of the Bishop of London. Following the conclusion of the Revolutionary War, churches quickly began to find themselves disestablished without the reliability of tax contributions to fund clergy and consolidated structures. In addition, the Episcopal Church experienced an increased need to fund mission, structure, bishops, and education. Viability became a primary concern as apathy and discouragement in these early years was prevalent. Discussions about membership, financial resources, and pastoral offices became important as part of the new measurements in the coming years. The first standardized attempt to collect data was created in 1804, data was collected at diocesan conventions from congregations and was collated at General Convention, where the whole was put into the form of a “pastoral letter” conveying general information about the state of the church. This pastoral letter was to be read on a Sunday morning in all the parishes to provide every member with a “full and accurate view” of the church for mission and ministry. Over the next sixty years, the reports became more formal including requirements of metrics and statistics, including ministry, demographic, and financial data. After the Civil War, another moment of change occurred when the mission required rethinking of canonical structure and new forms of accounting and measurements came into fashion. Throughout the late 19th century and 20th century, other changes and reviews of the Parochial Report came into being and the report itself became formalized and institutionalized as the primary means for gathering data about the ministry, mission, and status of congregations across the Episcopal Church. Many of these responses were in response to the changing contexts and realities facing the Church.

We recognize from time to time the Episcopal Church must make changes to the Parochial Report. We see a pattern of change throughout its history responding to new realities for funding for the purpose of local mission, emerging contexts, and structural changes.

### **Modern Responses:**

Today, the Episcopal Church is facing many of the same realities including how best to support and fund local missions, the concern over the rising cost of wider church structures, and contextual changes in the mission field. These are discussions held everywhere in the church from vestry meetings to General Convention. Such trends are accompanied by a desire for new mission practices, ministries that do not fit the confines of our existing structures, and the imperative to address the institutional and structural legacy of slavery, racism, and misogyny. The 2015, 2018, and 2022 State of the Church Reports have highlighted the parallel need to accompany these other discussions with a review of the Parochial Report.

Specific to our work in this Task Force, we received, and reprint here, a portion of the 2015 State of the Church excerpt on Assessing Congregational Vitality. iv The Report on the 2015 State of the Church suggests, the core of what we should be considering, including through measurement and assessment is congregational well-being, defined as whether our congregations are healthy, vigorous, sustainable, robust, thriving, and flourishing? Most interesting is the report’s finding that key to this work are the following considerations:

1. Examination of the internal and external contextual phenomena
2. More research utilizing narrative data must be undertaken
3. The 5<sup>th</sup> page addition to the parochial report is one important way for dioceses and the wider church to collect local narratives and test for vitality through vision or covenant documents, narrative, sharing of stories, or development

The 2015 report continues by suggesting there is a desire to move towards better description, measurements, and processes than previous attempts. Further, they note, “the questions placed before us by the State of the Church Committee are the following:

- 1) What if we have been looking at the phenomenology of church life using inadequate and/or accurate measures?
- 2) How might our self-study be improved if we engaged a team of social scientists and religious experts, and developed a vitality index of our own, to use alongside the metrics presently captured in the Parochial Report?
- 3) Is it possible that some of the most important activities in which we are engaged — evangelism, tending to the spiritual needs of our own members, and addressing the basic human needs as well as the emotional and spiritual needs of our neighbors — can only be understood properly when we re-think the facts that we gather?”

Continuing this work, the 2018 House of Deputies Committee on the State of the Church took a wider view of social and cultural impact assessments and the improved use of the networking and asset mapping work of the wider church office among other things. They also recommended the following resolution.

RESOLUTION 2018-A053: DESIGN A NEW PAROCHIAL REPORT Resolved, that the 79th General Convention charge the House of Deputies Committee on the State of the Church to work with the Office of the General Convention and Executive Council to design a new parochial report appropriate to the current context of the Episcopal Church including but not exclusive to multicultural congregations; aging populations; outposts of ministry in challenging economic contexts; and creative use of space and local engagement, to be administered and shared in networked, visible tools such as the Episcopal Asset Map.

The work of the 2022 House of Deputies Committee on the State of the Church took up additional work on the parochial report. “A primary goal of our committee has been to create a parochial report that would measure lead metrics and indicators of vitality, rather than only trailing metrics that indicate what happened in the past. Our hope has been to create a parochial report that can help guide decisions for the future, not simply report on what has already happened.” They remark on the over-importance our focus on measurement has played in defining what matters to us in the church. Unfortunately, progress was interrupted by the Covid-19 pandemic and while some of the work was begun, much was left unfinished as we arrived at our 80th General Convention in 2022.

The interim body Task Force to Study Congregational Vitality Indicators agrees with much of what has already been noted about this work regarding the parochial report.

We reaffirm and restate, with post COVID pandemic insight, the following:

1. Our research and conversation made it clear that “vitality” itself is a complex term with a correspondingly complex set of indicators. However, we believe that at the core of congregational vitality is spiritual vitality. Specifically, this is rooted in our faith in God and how we encounter God’s mission in our own lives.
2. We believe that every age of Episcopal Church mission requires an assessment of context, ministry, and mission financing. We believe that we are in such a time. Moreover, that such an evaluation must be done on a continuing basis – testing our assumptions and seeking wisdom from mission insights and new technologies.
3. We believe that we should continue to measure the basic trends which are the oldest: income of congregations and diocese, baptized and confirmed membership, Christmas and Easter attendance, Average Sunday Attendance, with the addition of Average Weekly Attendance, the pastoral offices (burial, marriage, etc.), and deaths (which is different from burials).

4. That the 5<sup>th</sup> page should continue to be used, with aid to diocesan formation of questions. We suggest that the General Convention Office seek to provide coaching on questions contextually to provide insight.
5. We believe from time to time the parochial report should be revised:
  - a. We believe we should continue to test outreach numbers for a minimum of a decade.
  - b. We believe we should incorporate the racial justice questions presently being gathered separately at the diocesan level.
  - c. We believe we should incorporate diocesan institutions (schools, outreach/service ministries, campus missions, summer camps and conference center programs, and missional life (house churches, dinner churches, missional communities, etc.)
  - d. In conversation with Scott Thumma of the FACTS and the General Convention Office, we believe they must help the church edit the questions in the parochial report. These suggestions should be given to the Committee on the State of the Church and Executive Council prior to the end of the next Triennium.
6. We believe that understanding the phenomenology of church is essential and that narrative story telling about how the Gospel is shaping our internal and external mission is essential to our future. We believe a phenomenological approach created using experts from social science along with religious experts, can develop a vitality index for The Episcopal Church, separate from that of the parochial report. Alongside the metrics presently captured in the parochial report we would have a more “accurate view” of the church.
7. We encourage the Office of the General Convention and the Executive Council to continue to work with Faith Communities Today (FACTS), an inter-denominational research cooperative, as well as other experts in the field of congregational vitality.

## **Conclusion:**

We do believe that if the wider church is to have the parochial report work be important it must stop the messaging that it is a “rite of passage” or “duty to be performed” and must communicate a theology rooted in the Gospel imperative of the living loving Lord which calls us to understand our reporting as a transparent way of celebrating our work.

We believe that the work of understanding our ministry can be an opportunity for renewal and celebration of our good work.

A reading of the history reveals that the purpose was not merely to figure out funding and structure, but there is a clear suggestion that part of the work was to reveal the vitality of the emerging church after the revolution. It is no coincidence in a time of unsettlement, post-COVID recovery, economic uncertainty, racial justice, and a desire to emphasize mission that we come to this moment. Therefore, we urge the House of Deputies’ Committee on the State of the Church, the church’s Executive Council

to move forward on both parochial report changes and a phenomenological approach to revealing the Gospel that is even now rooted across our church.

What is clear based upon our time as a Task Force is that it is not the work of church structure to address issues of congregational vitality, and that while we believe the work can and ought to be done, a Task Force is the inappropriate level of governance to adequately address issues of vitality.

## Proposed Resolutions

### **A067 Rebranding the Parochial Report**

*Resolved*, That the 81st General Convention commends the rebranding of the Parochial Report to the Executive Council; and be it further

*Resolved*, That the General Convention Office continue to work with the Executive Council and other partners to refine the parochial report form by asking better, more precise, and fewer questions; and be it further

*Resolved*, That the General Convention commend Bishops, Diocesan structures, lay leaders, clergy, outside organizations, and experts in the field to commence this work outside of the parochial report process, including use of Page 5 of the parochial report form to ask questions specific to the Diocesan context; and be it further

*Resolved*, That the General Convention commend the open sharing and collaboration of information, data, research, and findings on congregational vitality across the church.

#### EXPLANATION

The Episcopal Church website describes the parochial report as a “rite of passage.” There is in the church a terror of filling out the parochial report. Some even have names for it that do not lift it up as a tool for knowing ourselves, congregations, and mission. Some make jokes about where the 3,000 in Acts were recorded.

We often begin the discourse about the parochial report with disparaging comments about numbers and their lack of importance to the Gospel mission. Yet, the goal is to make each of us aware of the good work we share in across the Episcopal Church revealing the impact we have upon the lives of our parishioners and those in the wider communities in which we find our diverse missionary efforts.

We can even envision using the process of preparing the report as a tool for enhancing a congregation’s vitality.

The Task Force to Study Congregational Vitality Indicators does not believe that we can continue to make changes without considering the message that is sent with those changes. A new concern for narrative vitality, how the church and its interdependent agencies, and our collective mission we must rethink and communicate differently about our reasons for the parochial report.

Canonically this does not require a change, but an action by the office of General Convention with the wider communications office to communicate the hope that is within us as we share with joy the good news of mission at every outpost within the church.

We recognize as a Task Force that the wider church has added to the parochial report without removing questions. One interviewee pointed out that we have been very good at asking newer more relevant questions. Rebranding will not be enough to show the wider church that structures are listening to them. We will need to address fewer, more concise, and particular questions. We understand that the State of the Church Committee is working on the next parochial report, however, the trend towards better care of time is essential. As of the writing of this report the following are required by churches and dioceses: parochial report with its new outreach section and 5th page, the racial justice audit, safe church audit, and a host of committee and task force surveys inviting church opinion. We must decrease our gathered information to those things which help us get an accurate view of the “state of the church” being mindful that the church wide, diocesan, and local congregations experience different needs for information gathering and dissemination.