



Trinity Wall Street Grant Application
Vitality Improvement Project for Small Congregations and Judicatories (VIP)
(Narrative Format)

1. Project Summary

The FaithX Project (FaithX) is applying to Trinity Wall Street for a three-year, \$800,000 grant to develop and implement a self-sustaining **Vitality Improvement Project for Small Congregations and Judicatories (VIP)**. This project will have two primary goals:

- **Develop a Judicatory Vitality Assessment Tool.** Develop a research-based Judicatory Vitality Assessment tool and work with participating dioceses to assess and develop strategies to improve their vitality and sustainability. (Year 1)
- **Vitality Improvement Consultation.** Provide reduced-cost consultation and training (through scholarships or other appropriate means) to cohorts of small congregations and their dioceses that will allow congregations to assess and develop strategies to improve their vitality and sustainability with the assistance of their dioceses. (Years 1–3)

Features of this program include:

1. **Cohort-Based, Accelerator Model.** Bringing data-grounded tools and processes to those who need it most but can afford it least, allowing them to focus on improving vitality without the distraction of survival. Focus on the unique needs of small congregations by attending to the unique needs of the cohort.
2. **Data-Grounded Assessment and Strategy Development.** Providing tools and consultation that enable congregations and their dioceses to ground their missional discernment in objective data, including assessing their own vitality and sustainability strengths and weaknesses, identifying missional opportunities and challenges in the neighborhoods they service, and discovering and addressing their own blind spots and biases. Tools include MapDash for Faith Communities, the Congregational Vitality Assessment, and the Judicatory Vitality Assessment (development to be funded by this grant).
3. **Vision-Grounded Experimentation.** Assisting congregations in clarifying their vision and mission, and in using rapid experimental prototyping to develop new ways of being and doing Church in support of the clarified vision and mission.
4. **Systemic Sustainability.** We believe congregational sustainability is contextual. To achieve long-term vitality and sustainability, congregations must effectively engage their neighborhood and diocesan contexts. Therefore, we will be assisting congregations to determine whether it is possible for them to be self-sustaining. For example, if it is essential that their diocese has a presence in a declining community, a congregation might become a supported mission of the diocese. Likewise, if a congregation determines that the reason there are missional opportunities in the neighborhoods they serve that they are not effectively engaging, we might assist the congregation in developing effective strategies. In either of the above cases, we might assist the congregation in becoming a resource hub for the community, helping them find ways to leverage their property and building(s) to bring needed resources into their community. Such a resource hub could create a sustainable symbiosis, in which low rental fees would make it financial possible for nonprofit community service organizations and government agencies to locate services on the congregation's



property in the local community that the congregation serves, while those same fees would help the congregation sustain its own presence in the community.

5. **Pay-It-Forward Financial Model.** Grant funding will be used to elevate the first cohorts from simple surviving to becoming vital and sustainable congregations, which would generate sufficient resources to pay into a fund to support future cohorts. As each congregation improved its vitality and sustainability, grant-funded support would be gradually reduced and eventually eliminated.

The three-year \$800,000 grant funds will be allocated as follows: \$200,000 in the first year; \$300,000 per year in the last two years.

2. Organization's Experience with Similar Projects

FaithX is humbled to have gained the experience and expertise necessary to become a church-wide leader in the areas of congregational vitality and sustainability. We have been a pioneer in resource and program development to assist congregations in growing their vitality in ways that are transformative and beneficial both to the congregations who work with us and the communities they are called to serve. We have tested these strategies and resources in more than 30 judicatories and more than 100 congregations in 7 different denominations,¹ and we are eager to offer these tools in an even larger context, especially to small congregations and underrepresented groups who may not otherwise have the resources to afford them.

3. Alignment with Trinity's Strategic Area

The work in the VIP project is significantly aligned with Trinity's Leadership Grant area.

The cohort approach will identify, train, and network leaders of small and under-resourced congregations and the dioceses that support them.

VIP provides congregational and diocesan leadership teams with contextual-sensitive tools, resources, processes, and skills to effectively:

- Identify vitality and sustainability strengths and weaknesses in their congregations.
- Identify missional opportunities and challenges in the communities they serve.
- Leverage their strengths to engage missional opportunities and challenges.
- Identify areas of collaboration with other community partners whose strengths complement their weaknesses.

4. Project External Landscape

Today's congregations exist at a pivotal point in the history of the Church in which they are presented with both dangers and opportunities, as crises often do. Will the Church embrace new realities with agility and wisdom or will the Church revert to old behaviors while expecting different outcomes?

¹ For a list of clients at FaithX, visit: <https://bit.ly/FaithX-Clients>

Congregations exist today in a context of accelerating change and deepening uncertainty driven by forces both inside and outside the church. On the inside, institutional Christianity is being disintegrated by division and dissolved by disillusionment at such a rate that by the end of the century, the average number of Christians per congregation (including disaffiliated Christians) will be less than 70 congregants.² On the outside, the tapestry of neighborhoods in which congregations find themselves are changing at an astounding rate, with neighborhoods transitioning between different demographic groups measured in years rather than generations. Meanwhile, the culture as a whole is becoming less religious (though many still self-identify as spiritual), dis-affiliating from institutional religion at such a rate that by the year 2050, the vast majority of Americans will belong to “none of the above,” with Millennials and GenZ-ers leading the way.³

There are many reasons for this disaffiliation: societal influences, reactions to institutional Christianity’s perceived failings, and others.⁴ For the last several decades, these forces and trends combined have been rendering our congregations increasingly unsustainable, which in turn has often had a suppressing effect on congregational vitality. In short, many judicatories and churches entered the Covid pandemic with their church paradigms already outdated and increasingly irrelevant to the neighborhoods they have been called to serve. The coronavirus pandemic exponentially increased this trend.

We are witnessing the challenges and opportunities these forces are compelling churches to confront, both in our strategic missional planning work with congregations and judicatories across the country and in our conversations with their leaders. All faith communities face important, critical choices. Perhaps the overarching choice is how will we view the changes happening in our world and neighborhoods:

Are these changes threats or opportunities?

Will we respond in fear or in faith?

Will we respond with desperate attempts either to “get back to normal” or “lean into the changes,” seeking to discern new ways forward with the help of sound data, prayerful action, and empowered collaboration? Worship, evangelism, stewardship, and outreach are key manifestations of the Church’s mission, yet in today’s world none of these can be experienced solely through the lens of the old paradigms again—at least not by churches choosing pathways to vitality.

² Howard, Kenneth. 2017. “The Religion Singularity: A Demographic Crisis Destabilizing and Transforming Institutional Christianity.” *International Journal of Religion and Spirituality in Society* 7 (2): 77–93. <https://cgscholar.com/bookstore/works/the-religion-singularity>. Note: Since this number includes unaffiliated Christians, the average size of actual congregations could be significantly smaller.

³ Howard, Kenneth. 2019. “Grounding Discernment in Data: Strategic Missional Planning Using GIS Technology and Market Segmentation Data.” *Socio-Historical Examination of Religion and Ministry* 1 (2): 310-325. <https://www.shermjournals.org/home/archives/vol-1-no-2/2019-vol1-no2-11/>; Froese, Paul. 2017. *American Values, Mental Health, and Using Technology in the Age of Trump*. Baylor University. <https://www.baylor.edu/baylorreligionsurvey/doc.php/292546.pdf>; Zscheile, Dwight. 2015. “Disruptive Innovations and the Deinstitutionalization of Religion.” *Journal of Religious Leadership* 14 (2): 5–30. <https://arl-jrl.org/wp-content/uploads/2019/01/Zscheile-Disruptive-Innovations.pdf>.

⁴ McLaren, Brian. “Conditions for the Great Religion Singularity,” *Socio-Historical Examination of Religion and Ministry* 1, no. 1, (2019): 40-49. <https://www.shermjournals.org/home/archives/vol-1-no-1/2019-vol1-no1-05/>.



The COVID-19 crisis is presenting congregations with these choices in clear, urgent, and unavoidable ways. For example, congregations who view online worship as a necessary evil to be endured until they can return to “real” worship (i.e., in a building) will likely continue to decline in vitality, while those that view them as providential opportunities for liturgical creativity and radically inclusive evangelism are much more likely to survive and thrive. Those congregations who have resisted online giving are now seeing massive and discouraging declines in household giving, while those who had wholeheartedly embraced it are seeing actual increases in both the amount of giving and the number of givers. One study showed that 91% of congregations who embraced smartphone-based giving pre-COVID saw increased giving after shutting down for COVID. In fact, one New England church we know saw a 9% increase in givers and a 13% increase in donations.⁵

When it comes to the impact of crises on congregational vitality, one thing all congregations hold in common is that their perception is likely to become their reality. Unfortunately, the same cannot be said about congregations’ perception of their own vitality. In our experience with assessing congregational vitality, many churches live in denial about their own ability to thrive, and that inaccurate perception of their own reality leads to further decline.

5. Project Purpose, Goals, and Outcomes

Purpose:

The purpose of our congregational vitality program is to equip congregations (especially those who are historically underrepresented) to survive and thrive in turbulent times through data-grounded discernment. We do this by assessing their vitality and sustainability, identifying their missional opportunities and challenges in their neighborhoods, and coaching them in developing and implementing adaptive strategies. These processes enable them to address their weaknesses and leverage their strengths in order to effectively engage identified opportunities in ways that make their ministries sustainable in the long term.

Goals:

Primary goals of the program include:

1. **Diocese Recruitment.** Identifying five dioceses, each of which are willing to recruit up to 10 congregations and a diocesan project leadership team for a 3-year congregational vitality development program that will likely involve systemic changes within their judicatory.
2. **Diocesan Leadership Team Selection.** Assisting each judicatory in selecting its project leadership team and orienting the team to the purposes, goals, design, and anticipated outcomes of the project.
3. **Congregation Recruitment.** Assisting each judicatory’s missional leadership team to identify and recruit up to 10 congregations that are open to improving their vitality and sustainability and are committed to change so that vitality development interventions have maximum impact. We will recruit churches whose members and communities reflect a cross-section of race, language, and socioeconomic status, including historically under-resourced congregations.

⁵ Mafolasire, Abiodun. 2020. Finances in the Coronavirus Era (webinar). Indianapolis, IN: Givelify.

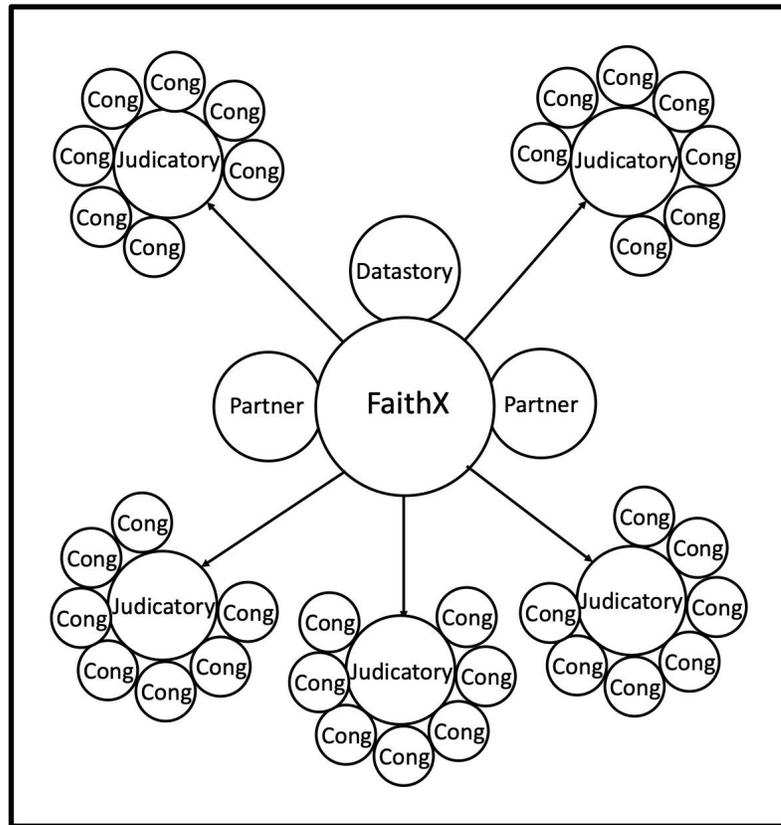


4. **Congregation Leadership Team Selection.** Assist each judicatory in identifying and recruiting project leadership teams from each participating congregation and then orienting those congregational project teams to the purposes, goals, design, and anticipated outcomes of the project.
5. **Congregational Vitality/Sustainability Assessment and Improvement.** Engage congregational participants and their diocesan support teams in assessing their potential for congregational vitality and sustainability improvement, as well as assist them in developing vitality/sustainability improvements strategies and track the impact of those plans on the vitality and sustainability of those congregations.

6. Project Activities, Outputs, and Anticipated Completion Dates

Our project integrates five major strategies to achieve sustainable improvement in congregational vitality:

- a. **Congregational Triage and Selection.** We will assist each judicatory's missional leadership team in undertaking triage protocols to identify and recruit 10-12 congregations that represent a cross-section of race, language, and socioeconomic status, including historically under-resourced people groups, as well as identify congregations that are open to improving their sustainability so much so that vitality development interventions are likely to have a significant impact on their surrounding communities.
- b. **Data-grounded Strategic Missional Assessment and Planning.** Pioneered FaithX, this cyclical process lies at the core of our Congregational Vitality Improvement Program. Missional assessment involves internal self-assessment of congregational vitality and external identification, validation, and prioritization of emerging missional opportunities and challenges in surrounding neighborhoods. Missional Strategy Development involves modeling strategies to engage identified missional opportunities, testing those strategies experimentally in iterative pilot tests, and adaptably implementing those strategies.
- c. **Communities of Practice.** We anticipate creating communities of guided learning and practice in which successes can be celebrated, challenges can be processed, and progress supported and sustained. We anticipate convening them at several levels: communities formed among participating congregation project teams, among participating judicatory project teams, and among joint congregation-judicatory teams.
- d. **Resourcing and Resource Development.** We will bring to congregations and their dioceses critical tools to assist them in strategic missional assessment and planning, including: (a) MapDash for Faith Communities, an interactive, online demographic analytic platform, developed with our affiliate, Datastory; (b) the Congregational Vitality Assessment, developed in partnership with the Episcopal Church Foundation; and the Judicatory Vitality Assessment, to be developed as part of this project.
- e. **Diffusion of Innovation** will be achieved through the above communities of practice, webinar and podcasts, conferences and workshops, and other venues.



Project Programmatic Structure

7. Outputs, Outcomes, and Evaluation

Outputs

Year 1:

- **Partners:** FaithX will recruit up to three organizations to partner with us in the project (including our affiliate, Datastory).
- **Dioceses:** FaithX will recruit up to five dioceses to participate in the project, provision and train each of them with MapDash for Faith Community and the Congregational Vitality Assessment – Judicatory Dashboard and train them how to use those tools.
- **Congregations:** With our assistance, dioceses triage their congregations and recruit up to seven congregations each (up to 50 total) to participate in the program.
- **Baseline Data:** Early in the first year, with our assistance, dioceses will use the MapDash Congregational Vitality Index, the Congregational Sustainability Index, and the Congregational Vitality Assessment (CVA) to establish baseline vitality and sustainability data on all participating congregations.



- **Initial Missional Assessment and Planning:** Early in the first year, FaithX do an initial missional assessment with all congregations, helping them to identify and prioritize vitality/sustainability weaknesses to address, neighborhood missional opportunities/challenges to engage, and develop strategies and plans.

Year 2:

- **Learning Dissemination Conference:** At the beginning of the first quarter, all cohorts will gather to share their learnings from the first year.
- **Congregational Mission Plan Full Implementation:** Early in the first quarter, with FaithX and diocesan staff assistance, congregations will adopt multiple success milestones (how they will know they are on a trajectory for success) and will have begun to execute vitality/sustainability improvement plans.
- **Mid-Year Check-In and Adjustments.** By the end of the second quarter, congregations will check in with their diocesan cohorts, share strategies, achievements and setbacks, harvest suggestions, and make course corrections.
- **Year-End Vitality/Sustainability Assessment:** By the end of the fourth quarter, with FaithX and diocesan staff assistance, congregations will take the CVA a second time to determine how much progress they have made in increasing their vitality and sustainability, and whether they ultimately be able to become sustainable in their context. Those that determine they may not be able to achieve sustainability will develop contingency plans to close in a way that their assets can have a missional impact on their communities.

Year 3:

- **Learning Dissemination Conference:** At the beginning of the first quarter, all cohorts will gather to share what they've learned from the first year.
- **Congregational Mission Plan Adjustments:** Early in the first quarter, with FaithX and diocesan staff assistance, congregations will achieve their success milestones, adapt their vitality/sustainability improvement plans, and begin to execute them.
- **Mid-Year Check-In and Adjustments.** By the end of the second quarter, congregations will check in with their diocesan cohorts, share strategies, achievements and setbacks, harvest suggestions, and make course corrections.
- **Year-End Vitality/Sustainability Assessment:** By the end of the fourth quarter, with FaithX and diocesan staff assistance, congregations will take the CVA a second time to determine how much progress they have made in increasing their vitality and sustainability and determine whether they still think it is possible that they will ultimately be able to become sustainable within their neighborhood and diocesan contexts. Those that have determined they cannot achieve this will begin to implement their plans to close in a way that their assets can be reprogrammed in order to have a missional impact on the neighborhoods they serve.

Evaluation

We plan to evaluate this program using both impact evaluation (does the program achieve desired outcomes) and process evaluation (are the programmatic interventions being implemented as designed).



Process Measures. Process measures will be accomplished through interviews with congregational and judicatory teams.

Outcome Measures. We anticipate that a majority of the congregations participating will show a measurable and sustainable increase in congregational vitality as measured by the MapDash Congregational Vitality Index (based on trends observed in parochial reporting), and the FaithX Congregational Vitality Assessment (a self-administered, research-grounded diagnostic inventory).

- **The MapDash Congregational Vitality Index⁶** will be sampled and analyzed in the first and third year of the project.
- **The Congregational Vitality Assessment** will be administered at the beginning and end of Year 1, and at the end of Years 2 and 3.

8. Staff Qualifications and Volunteer Roles

The key people engaged in leading this project are Ken Howard, Steve Matthews, and Mary Frances, with assistance from Katie Romano-Griffin, Lawrence Clark, Anne Gerrietts, and Darren Slade.

Ken Howard, FaithX Founder and Executive Director will serve as project manager, and partner relationships manager, and vitality and sustainability consultant. Ken is an ordained Episcopal clergyperson with 25+ years of experience in church planting and congregational redevelopment and holds master's degrees in divinity with thesis honors and Education with concentration in Adult Education).

Mary Frances, FaithX Senior Consultant, will be responsible for a significant portion of our vitality and sustainability consulting. Mary is an ordained Lutheran clergyperson with more than 20+ years of experience in church planting and congregational redevelopment.

Steve Matthews, FaithX Senior Consultant, will be responsible for a significant portion of our vitality and sustainability consulting. Steve has more than a decade of experience in church planting and congregational redevelopment.

Katie Romano Griffin, FaithX Adjunct Consultant for Multicultural Issues, will engage with us on Latino and Hispanic congregations or multicultural congregations with significant Latino/Hispanic populations. Katie is an ordained Unitarian Universalist clergyperson with nearly a decade of experience and a background in marketing.

Lawrence Clark, FaithX Adjunct Consultant for Multicultural Issues, will engage with us on African-American and urban congregations or multicultural congregations with significant African-American populations. Larry is an ordained Lutheran clergy person, with several decades of urban and multicultural experience.

Anne Gerrietts, FaithX Adjunct Consultant for Building Assessment, will engage with us on building related issues, as needed. Anne holds a degree in public engineering, and more than a decade of experience in building assessment in both the ELCA and The Episcopal Church (with the Church Building Fund).

⁶ For more information on the MapDash for Faith Communities Congregational Vitality and Sustainability Indexes, visit: <https://bit.ly/FaithX-CVI-CSI>.



Darren Slade, PhD, FaithX Research Director, will assist us in the research necessary to develop the Judicatory Vitality Assessment. Darren holds a doctorate in theology with a concentration in research.

David Maglott, FaithX Finance Director, will manage project funds. David is a retired public health officer with decades of experience in grants management.

Haley Bankey, Episcopal Church Foundation Program Director, will oversee the developer who will do the necessary programming to bring the Judicatory Vitality Assessment online.

9. Organizational Commitment to Addressing Racial Disparities

FaithX has always been committed to addressing racial disparities. As our team has grown, we have continuously made efforts to increase the diversity of our team. Four of our 8-member board of directors are people of color, including 2 LatinX, 1 African-American, and 1 Afro-Latina. Similarly, two of our 6-member consulting team consultants are people of color, including 1 African-American and 1 Latina. (see Appendix 3 – Board Members for names and bios)

In 2021, FaithX developed and launched Mapping Systemic Racism (MSR), in which we use interactive GIS mapping to convincingly demonstrate the historical and current impacts of systemic/structural racism in a selected community. The MSR also helps congregations identify targeted strategies for mitigating those impacts while providing them with effective tools to displace the underlying narrative that supports systemic racism. FaithX facilitated this program in urban, suburban, and rural contexts (including Native American reservations). Our most recent MSR project – [Do Justice. Love Kindness. Walk Humbly](#) – covered the entire Episcopal Diocese of Long Island ([click here to review](#)).

10. Annual Audit

We will set aside sufficient grant funds to provide an annual independent audit of this project to be reported to Trinity Wall Street.

11. Defining Project Success

We will consider this project to be a success if:

1. A majority of the dioceses engage in a triage of their congregations according to their levels of vitality and sustainability (High, Moderate, or Low).
2. A majority of dioceses identify up to ten moderate or low-vitality congregations that are likely to improve their vitality and sustainability with missional intervention.
3. A majority of those congregations that can become contextually sustainable make progress toward achieving it or, in the case of congregations that cannot become self-sustaining but are located in areas in which the diocese has determined it must have a presence, can be sustained with the diocese's help.

12. Evaluating Project Impact and Effectiveness

We plan to evaluate this program using both impact evaluation (i.e., does the program achieve desired outcomes) and process evaluation (i.e., are the programmatic interventions being implemented as designed).

Process Measures

Process measures will be accomplished through interviews with congregational and judicatory teams.

Outcome Measures

We anticipate that a majority of the congregations participating will show a measurable and sustainable increase in congregational vitality as measured by the MapDash Congregational Vitality Index (based on trends observed in parochial reporting), and the FaithX Congregational Vitality Assessment (a self-administered, research-grounded diagnostic inventory).

- **The MapDash Congregational Vitality Index⁷** will be sampled and analyzed in the first and third year of the project.
- **The Congregational Vitality Assessment** will be administered and reviewed annually.

13. Potential Project Obstacles (Internal/External)

There are a number of potential obstacles we might anticipate, both as we launch and over time.

Obstacle: Impact of the COVID-19 Crisis

Clearly, the COVID-19 crisis has the potential to pose a significant obstacle to increasing congregational vitality because of its physical, emotional, financial, and organizational impact on congregations, their members, judicatory support staff, and their neighborhoods. Almost every member of every congregation will have known someone who died from COVID-19 and many will have lost one or more of their members. Many congregations will have suffered membership, attendance, and financial losses, as well. Almost everyone will be in mourning, not just for the above losses but for the death of familiar and predictable ways of doing and being Church.

Response: A Process for Seeking Grace and Opportunity in the Midst of Grief

We believe that COVID-19 also poses a significant opportunity. Research has shown that the impact of crises on organizational functioning is highly dependent on how they perceive it. Organizations that primarily focus on fighting against loss tend to become rigid and brittle and continue to decline, whereas organizations that seek to learn and seek the opportunities it presents tend to become more pliable and resilient.⁸

Our challenge will be to help congregations focus on learning what the crisis has to teach them and help them to open their eyes to the opportunities and the grace God is offering them through the crisis. We have found that the interactivity of the platform we employ and the process we offer helps congregations visualize the opportunities around them. Indeed, every congregation is now a startup, should they choose to accept it or not.

⁷ For more information on the MapDash for Faith Communities Congregational Vitality and Sustainability Indexes, visit: <https://bit.ly/FaithX-CVI-CSI>.

⁸ Rochet, Claude, Olivier Keramidas and Lugdivine Bout. (2008). "Crisis as change strategy in public organizations." *International Review of Administrative Sciences* 74(1):63–76.



As painful as it will continue to be, the COVID crisis may also make possible a re-creation of the Church. The Coronavirus pandemic is forcing changes that will destabilize and transform the Church in all its institutional forms in ways that will likely become permanent, not just in the way congregations gather for worship but in every aspect of congregational life: bible study, discernment, fellowship, formation, giving, outreach, stewardship, and even how they organize, plan, strategize, implement. Our job, especially in the first year, will be to provide the necessary structure for them to process their grief over what they have lost so that they can claim what is objectively good about these changes and turn their eyes toward the future into which God is beckoning them.

Obstacle: The Pastoral Nature of Leadership

In our experience, most ordained leaders in the church, especially at the congregational level, are selected for training in ministry based on their pastoral qualities, not their administrative skills. Seminary training tends to focus heavily on building skill in pastoring, preaching, and teaching skills, and knowledge of the bible and theology. Meanwhile, it focuses significantly less on organizational, administrative, change management, collaboration, and conflict transformation skills, and understanding sound business practices. As a result, clergy leadership tends to be pastoral, rather than strategic. And decision tends to be based much more on prayerful and intuitive discernment, rather than rigorous data gathering and analysis, though the two are not mutually exclusive.

Response: An Integrated Practice of Data-Grounded Discernment

Our program is designed to demonstrate to congregational leaders that intuition and data analysis are not antithetical but complementary: two integral subjective and objective parts of the discernment process. We provide them the tools and the processes to develop a prayerful, intuitive, and *data-grounded* discernment practice.

Obstacle: Historically Under-Resourced Congregations

Due to historic under-resourcing, some of the congregations who might most benefit from congregational vitality interventions may also be the least able to afford it.

Response: Financial Support and Teaching Triage

One of the great gifts that would be inherent in receiving the Trinity Wall Street Grant is it will allow us to establish a “sliding scale” that we can use to bridge the gap between a congregation’s need and its ability to pay. The challenge will be distinguishing between congregations for which investing in vitality interventions will make a difference and those whose vitality will diminish regardless. The Vitality and Sustainability Margin analytic indexes we developed as part of MapDash for Faith Communities will provide judicatories with the capability of making those kinds of distinctions.

14. Outside Funds

We do not exclude the possibility of grant funding from sources other than Trinity. Rather, we are budgeting for this project to be sustainable from a mix of Trinity grant funds, discounted FaithX services, and contributions from participating dioceses and congregations. We have learned from hard experience that an appropriate level of financial investment is important to ensuring their commitment to the process. As Jesus said, “Where your money is, there will your heart be also.” If any additional external funding resources become available, we simply use them to expand the number of participating dioceses and congregations.



15. Long-Term Project Financial Sustainability

The Issue: Sustainability vs. Dependence. Our experience has taught us that a congregation's internal vitality is deeply intertwined with its capacity to sustain its current configuration in its current context. It has also been our experience that long-term dependence on external sources to maintain sustainability tends to weaken a congregation's underlying vitality. In order to conduct ministry in some contexts, a congregation may have to create a different, more sustainable configuration. While there may be contexts in which ministry is a fully-funded mission of its judicatory or another congregation, that should be an intentional exception, and the margin for that ministry must be found within the judicatory-congregational system of which it is a part.

The Solution: Systemic Capacity Building. Rather than replacing one external dependency with another, our intention is to build capacity within judicatory systems—human and financial—to carry on the work of improving congregational vitality and sustainability beyond the end of grant funding. We will do this through an annual iterative process of internal and external missional assessment, strategy development, and implementation focused on increasing congregational vitality by progressively increasing the alignment between the congregational vision, mission, structure, and strategy, as well as their neighborhood missional opportunities and challenges. Diocesan commitment to this process will be critical to the success of the project. Therefore, by the end of the grant period we expect to see the following five outcomes:

1. **Increasing vitality of participating congregations** where external conditions are favorable, as evidenced by increasing scores on the MapDash Congregational Vitality Index (CVI) when measured at the end of Years 1 and 3 and increasing scores in the Faith-ECF Congregational Vitality Assessment (CVA) in Years 1-3.
2. **Increase effectiveness of stewardship practices**, as evidenced by increases in the CVI stewardship sub-scores (Household Giving and Regular Giving as Percentage of Normal Operating Income) on the MapDash CVI when measured at the end of Years 1 and 3 and increasing scores in the stewardship section of Faith-ECF CVA in Years 1-3.
3. **Increases in the capacity of congregations to engage in adaptive leadership**, as evidenced by their participation in appropriate training and observation of congregational leaders in the cohort groups.
4. **Commitment to congregational and leadership development on the part of participating dioceses**, as evidenced by their agreement to do so as a condition of participation in the project, and their participation in appropriate training, along with cost sharing with their participating congregations in doing the same.
5. **Increases in the ability and capacity of dioceses to support adaptive leadership** in their participating congregations, as measure by the criteria as Outcome #4.

Diocesan commitment will be critical to the success of the project. Where appropriate the project will make use of training available through Trinity Wall Street.

Pay-It-Forward Financial Model. This financial model is key to sustaining the Vitality Improvement Project beyond the end of the grant funding period. Over the course of the project, we expect congregations and their dioceses to become more vital, as well as financially sustainable. This will make it possible for the focus of the project to shift from intensive consultation and training toward less costly coaching. This in turn will allow increasing amounts of their financial contributions to the project to a dedicated Vitality Improvement Fund account that will be used to bring additional



congregations and dioceses into the project. By the end of the grant period, we conservatively estimate that we will have been able to increase the fund to nearly \$445,000, which will allow us to bring additional congregations into the project in its second and third years, and beyond. Also, as a condition of participation, participating congregations and dioceses would agree that if they succeed in increasing their vitality and sustainability, they will dedicate 1% of their income to the Vitality Improvement Fund for seven years.

Also, we will continue to be in discussion with potential financial partners over the period of the grant and beyond, which if we are successful could further expand the Vitality Improvement Fund.

16. Total Project Budget

The total project budget will be \$1,182,500, of which \$800,000 is from Trinity Grant Funds, as described below. See Appendix 1 for a detailed budget breakdown.

SOURCE	YEAR 1	YEAR 2	YEAR 3
Trinity Grant Funds (toward program costs)	\$200,000	\$300,000	\$300,000
Diocese Contributions (toward resources): \$10K/yr./diocese	\$50,000	\$50,000	\$50,000
Congregation Contributions (toward resources): \$750/yr./cong.	\$37,500	\$37,500	\$37,500
FaithX Scholarships (toward resources): \$500/yr./cong.	\$30,000	\$30,000	\$30,000
Other Sources (webinar fees, supplemental coaching, etc.)	\$10,000	\$10,000	\$10,000
TOTAL	\$327,500	\$427,500	\$427,500

17. Project Budget and Trinity Grant Fund Allocation

Trinity funds will be allocated for program and development costs: Consultation, training, coaching, development of Judicatory Vitality Assessment. All other funds will be allocated toward the cost of resources: Congregational Vitality Assessment subscriptions, Judicatory Vitality Assessment subscriptions, MapDash for Faith Communities subscriptions, webinar software expenses, etc.

18. FaithX Operating Budget

For FaithX budget detail, see Appendix 2: FaithX Operating Budget 2022.

19. Learning Dissemination

Learning dissemination is an integral part of our proposed program, involving communication of what we are learning both inside the program among the participating congregations and dioceses as well as outside the program to the congregations, judicatories, and denominational bodies that comprise the larger church, and finally to Trinity Wall Street.

Learning dissemination among participant congregations and judicatories will take place through several “channels,” including:

- **Communities of Practice.** We will be forming communities of practice at several levels in which learning can be shared among congregational leadership teams, diocesan leadership teams, and joint congregational-diocesan leadership teams within each diocese.



- **Webinars and Podcasts.** We will offer regular webinars (at least quarterly) at which participating congregations and judicatories can share strategies and learnings.
- **Conferences and Workshops.** If Covid allows, we will also host regular gatherings of program participants (at least annually) at different regional locations, at which learnings can be shared and possibilities explored.

Learning dissemination to the larger church will take place through:

- **Learning dissemination hubs**, including denominational governing bodies, seminaries, publications, and news services, other faith-based resource organizations, and through a multi-denominational email distribution list that we will develop.
- **Podcasts**, such as the ones described above.
- **Learning dissemination partners**, such as **Trinity Wall Street, Episcopal Church Foundation, Bexley-Seabury, TryTank** (a collaborative project of Virginia and General Seminaries, and others could disseminate learning through their respective networks, and integrate them with their workshop, classes, and fellowships.

Publications:

- **Annual Reports:** At the end of Year 1 and Year 2 we will publish preliminary reports on what strategies and tactics appear to be meeting with success in which contexts.
- **Final Report:** At the end of year 3 we will publish a final report with a more definitive answer on what works in which contexts.
- **Journal Publication:** We will seek to publish reports in peer-reviewed journals, including *Socio-Historic Examination of Religion and Ministry*, the independently edited journal supported by FaithX, and the *Anglican Theological Review*.

Other Possible Dissemination Channels:

In addition to the integrated activities described above, we will be alert for other communication possibilities as they present themselves over the life of the program.