

# Trinity Church Wilmington

## Annual Leadership Retreat 2012

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*Note: We are not assuming that all the material in this packet will be used. It is here so we have it available if our conversation moves in a related direction.*

# Trinity, Wilmington Vestry Retreat 2012

## Overall Purposes of Leadership and Vestry Retreats

A yearly leadership conference that is a mix of:

1. Developing strategies and plans for the improvement of parish life & ministry. This would be based on a process of reflecting on and learning about, the whole, or some area of parish life
2. Community building among parish leaders
3. Spiritual development
4. Increasing the common competencies of parish leaders for the above. Part of our purpose is for the vestry and other leaders to increase their skills and knowledge for congregational development and leadership.

## Specific areas of interest for this year

1. Over the course of the coming year – to improve how the vestry gets things done and increases clarity regarding what needs to get done. *On retreat:* engage in diagnosis of the issue --a process of learning from the experience of the rector and vestry
2. Increase our understanding of vestry team dynamics and identify ways to improve work together
3. Assess the state of the parish (use same tools as last year) with a focus on Old Swede's

*Note: Elements may be changed as needed to work with issues that emerge in the course of the work.*

## Friday Evening

- 6:00 Social Time
- 7:00 Supper
- 7:45 Work Session: 1) Overview 2) Connecting 3) Getting started – Vestry team dynamics, as seen in MBTI group profile
- 9:00 Compline – beginning with intro to doing the Office in a group (Michelle); then Compline
- 9:30 Social time

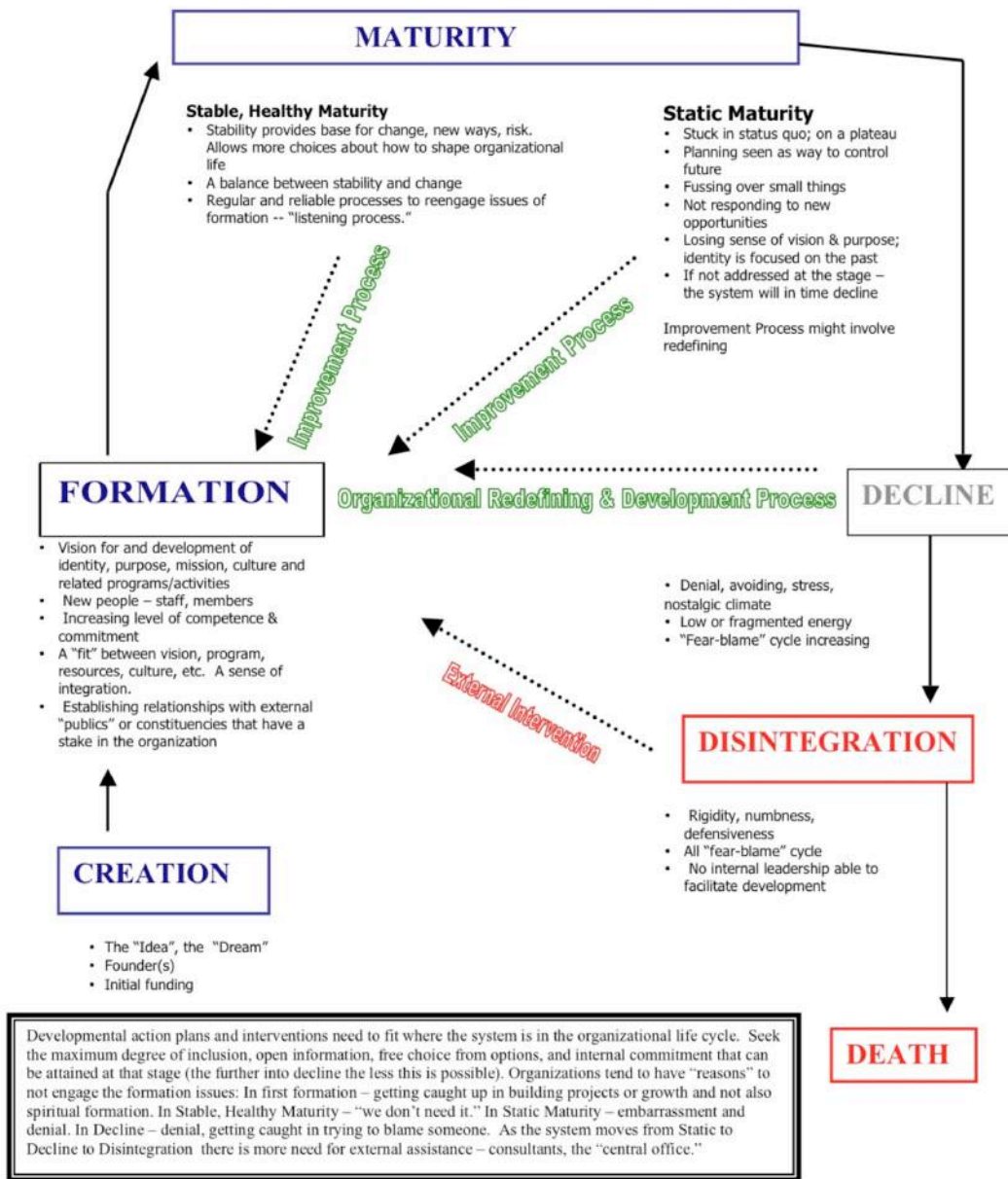
## Saturday

- 8:00 Breakfast
- 9:00 Morning Prayer
- 9:20 Work Session – Vestry team dynamics (continued)
- 10:30 Break
- 10:45 Work Session – Assess parish movement – all, with focus on Old Swede's
- 12:00 Lunch
- 1:00 Work Session – 1) continue assessing work 2) how we get things done
- 3:00 Rest – Recreation
- 6:00 Supper
- 7:00 Work Session – How we get things done (continued)
- 9:00 Compline
- 9:20 Social Time

## Sunday

- 8:00 Breakfast
- 8:45 Holy Eucharist
- 9:30 Work Session – 1) Wrap up as needed – next steps, 2) Evaluation 3) Routine vestry work beginning at 11:00
- 12:00 Lunch

# ORGANIZATIONAL LIFE CYCLE



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# Two stories

## Going to Abilene

On a hot afternoon visiting in Coleman, Texas, the family is comfortably playing dominoes on a porch, until the father-in-law suggests that they take a trip to Abilene [53 miles north] for dinner. The wife says, "Sounds like a great idea." The husband, despite having reservations because the drive is long and hot, thinks that his preferences must be out-of-step with the group and says, "Sounds good to me. I just hope your mother wants to go." The mother-in-law then says, "Of course I want to go. I haven't been to Abilene in a long time."

The drive *is* hot, dusty, and long. When they arrive at the cafeteria, the food is as bad as the drive. They arrive back home four hours later, exhausted.

One of them dishonestly says, "It was a great trip, wasn't it?" The mother-in-law says that, actually, she would rather have stayed home, but went along since the other three were so enthusiastic. The husband says, "I wasn't delighted to be doing what we were doing. I only went to satisfy the rest of you." The wife says, "I just went along to keep you happy. I would have had to be crazy to want to go out in the heat like that." The father-in-law then says that he only suggested it because he thought the others might be bored.

The group sits back, perplexed that they together decided to take a trip which none of them wanted. They each would have preferred to sit comfortably, but did not admit to it when they still had time to enjoy the afternoon.

## Five Apes

Start with a cage containing five apes.

In the cage, hang a banana on a string and put stairs under it. Before long, an ape will go to the stairs and start to climb towards the banana. As soon as he touches the stairs, spray all of the apes with cold water. After a while, another ape makes an attempt with the same result -all the apes are sprayed with cold water. This continues through several more attempts.

Pretty soon, when another ape tries to climb the stairs, the other apes all try to prevent it. Now, turn off the cold water. Remove one ape from the cage and replace it with a new one. The new ape sees the banana and wants to climb the stairs. To his horror, all of the other apes attack him. After another attempt and attack, he knows that if he tries to climb the stairs, he will be assaulted.

Next, remove another of the original five apes and replace it with a new one. The newcomer goes to the stairs and is attacked. The previous newcomer takes part in the punishment with enthusiasm. Again, replace a third original ape with a new one. The new one makes it to the stairs and is attacked as well. Two of the four apes that beat him have no idea why they were not permitted to climb the stairs, or why they are participating in the beating of the newest ape.

After replacing the fourth and fifth original apes, all the apes, which have been sprayed with cold water, have been replaced. Nevertheless, no ape ever again approaches the stairs. Why not? Because that's the way they've always done it and that's the way it's always been around here. And that's how company policy begins

The **Abilene paradox** is a paradox in which a group of people collectively decide on a course of action that is counter to the preferences of any of the individuals in the group. It involves a common breakdown of group communication in which each member mistakenly believes that their own preferences are counter to the group's and, therefore, does not raise objections. A common phrase relating to the Abilene paradox is a desire to not "rock the boat". The phenomenon may be a form of groupthink. It is easily explained by social psychology theories of social conformity and social influence which suggest that human beings are often very averse to acting contrary to the trend of the group. Likewise, it can be observed in psychology that indirect cues and hidden motives often lie behind peoples' statements and acts, frequently because social disincentives discourage individuals from openly voicing their feelings or pursuing their desires. The Abilene Paradox is related to the concept of groupthink in that both theories appear to explain the observed behavior of groups in social contexts. The crux of the theory is that groups have just as many problems managing their agreements as they do their disagreements. This observation rings true among many researchers in the social sciences and tends to reinforce other theories of individual and group behavior. The Abilene paradox was introduced by management expert Jerry B. Harvey in his article *The Abilene Paradox: The Management of Agreement*. The name of the phenomenon comes from an anecdote in the article which Harvey uses to elucidate the paradox.

From [http://en.wikipedia.org/wiki/Abilene\\_paradox](http://en.wikipedia.org/wiki/Abilene_paradox)  
More -- <http://www.abileneparadox.com/>

### **The Five apes and organizational culture**

The story illustrates how culture is created and maintained over time.

Organizational Culture is at its core the web of shared assumptions

1. Which define "reality" for people in the organization
2. Which is expressed in and supported by organizational structures, values, processes, symbols and style
3. Which was learned in adapting to the environment and establishing internal integration
4. Which is taught to new members

This central and deep aspect of culture works along with "*ways of working and being*" ("how we do things in this parish" and "that's just how we are") and the *espoused values* of the parish.

When the ways of working and the espoused values are not aligned (and they are never fully aligned) the reason is often found in deeper underlying assumptions about the nature of things (God, reality, humanity).

# The Change Formula

$$C = D \times V \times F > R$$

**Change** equals **Dissatisfaction X Vision X First Steps** that is greater than the **Resistance**

The idea is that if you are seeking some significant, system-wide change there are several core elements that need attention.

**We need a critical mass of the organization to:**

1. Be **dissatisfied (D)** with the way things are (in relationship to the proposed change). This often doesn't come until some force from outside the organization creates a crisis for the organization.
2. To have a **vision (V)**, an image or an idea of what improvement would look like, that is grounded in the hopes and dreams of employees or members. An old saying among leaders is - - "Being right is only one-quarter of the battle." It's not uncommon for leaders to have a vision of what improvements are needed. The problem is that just communicating the vision (or mission, or strategic plan) will not bring change.
3. With a clear sense of what needs to be done as **first steps (F)**. This means having a picture of what we can do differently in the short term that will move us toward that vision. Four major factors for leaders to take into account are: 1). What competencies need to be developed or strengthened for people to be able to function in the changed situation? People don't like to feel incompetent and change often creates that feeling. 2). People are often hesitant to accept and implement the change because they fear losing friends and colleagues who are in opposition. 3). Having the needed resources to make the change. 4). Beginning to create an alignment of structures, process and practices that will be in harmony with the new way.

**Resistance (R)** is likely to be present in all change efforts. The combined weight of the dissatisfaction, vision and first steps needs to be able to overcome that resistance. That means if any of those elements (D, V, F) is "0", the change will not be possible.

It is useful to use Chris Argyris's intervention theory in applying the change formula. The theory suggests that the more people you get involved in diagnosing the situation, exploring options, and shaping a picture for the future, the more likely you are to develop a commitment in people that is sustainable under pressure and over time.

Dick Beckhard and Reuben Harris described the change formula in an article. They attribute its creation to David Gleicher.

Robert A. Gallagher 2005

# Type Profiles

Used in assessing team functioning.

What is the team's

- Strength
- Blindside
- Dynamics
- Potential areas of tension

## 16 Types

Exploring interpersonal effectiveness; issues of personal fit for a task; looking at team strengths/blindsides

## Quadrants

Change, team or organizational culture; looking at relationships with people you are serving (clients, members, customers); leadership styles; work styles

## Temperament

Leadership style & competence; issues around the leader; roles/authority/responsibilities

## Functions

Communication issues, team direction

## Decision Making Dynamics

Exploring dynamics in decision making, problem solving

**For more information** see *Introduction to Type in Organizations*, Sandra Krebs Hirsh and Jean Kummerow, CPP and *Introduction to Type and Teams*, Sandra Krebs Hirsh. CPP

## 2012 Trinity, Wilmington Team Profile: Sixteen Type Preferences

<b><u>ISTJ</u></b>  Ann Hamilton (E)	<b><u>ISFJ</u></b>  Cindy Taylor	<b><u>INFJ</u></b>  Patty Downing Ginny Wilder (S)	<b><u>INTJ</u></b>  Martha Driver
<b><u>ISTP</u></b>  Robert Contino	<b><u>ISEP</u></b>	<b><u>INEP</u></b>  Luke Hyman  Consultants Michelle Heyne Bob Gallagher	<b><u>INTP</u></b>
<b><u>ESTP</u></b>	<b><u>ESFP</u></b>	<b><u>ENFP</u></b>  Robert Gooderham (I)  Jeff Brown (J)	<b><u>ENTP</u></b>  Margaret Vavala (SFJ)
<b><u>ESTJ</u></b>  Maureen Lyons  Kathy VanDevender	<b><u>ESEJ</u></b>	<b><u>ENEJ</u></b>  Marie Smith	<b><u>ENTJ</u></b>  Rick Carroll Greg Moore

Underlined are the dominant function. If an Introvert – the dominant function is “introverted”; people first see the secondary or auxiliary function.



## Quadrants Profile

*Change, team or organizational culture; looking at relationships with people you are serving (clients, members, customers); leadership styles; work styles*

<p><b>IS</b></p> <p>Holds onto what has worked and served the group in the past. Pays attention to details. Good at administration; developing and using procedures. Tends to be quiet, reflective, practical. Helps systems maintain continuity. In change efforts will help the group hold onto what has worked and see what needs to be preserved. May resist change if the process isn't appreciative enough and clear about what we will maintain as well as what needs to be changed.</p> <p><b>Ann Hamilton (E)</b>  <b>Cindy Taylor</b>  <b>Robert Contino</b></p>	<p><b>IN</b></p> <p>Has a vision for a new way of approaching things. Is usually thoughtful, reflective, internal. Can help the group think about things differently, open up new ways of doing the work. Makes good use of research and speculative ideas. In change processes is motivated by an internal vision of what might be; wants to reflect and think about the possibilities before acting. May be helped in a change process by being able to read relevant material before moving into action.</p> <p><b>Patty Downing</b>  <b>Ginny Wilder (S)</b>  <b>Luke Hyman</b>  <b>Martha Driver</b>  <i>Consultants</i>  <b>Michelle Heyne</b>  <b>Bob Gallagher</b></p>
<p><b>ES</b></p> <p>Wants to take action and be focused on achieving results. Energetic, outgoing, practical. Frequently wants to move quickly. Values making things "work"; being effective and efficient. In change efforts wants to see how it will improve how things are done; that the change will bring better results.</p> <p><b>Maureen Lyons</b>  <b>Kathy VanDevender</b></p>	<p><b>EN</b></p> <p>Enjoys trying new things; likes change. Usually outgoing, high energy, active, can be sporadic. Talks about new ideas, ways of working and being. Is focused on change; wants to move into action promoting and implementing a new way or project. In a change process is helped by making the change and seeing what happens; wants to "just try it!"</p> <p><b>Robert Gooderham (I)</b>  <b>Jeff Brown ( J)</b>  <b>Marie Smith</b>  <b>Rick Carroll</b>  <b>Greg Moore</b></p>

## Team Profile: Temperament

*Leadership style & competence; issues around the leader; roles/authority/responsibilities*

1. Place members of the team in the grid.
2. Explore leadership styles – what are the team’s strengths, weaknesses, possible areas of tension, other dynamics?
3. How might the team make best use of its leadership gifts? How to compensate for its blindside(s)?

<b>SJ</b> Anne	<b>SJ</b> Cindy	<b>NF</b> Patty Ginny	<b>NT</b> Martha
<b>SP</b> Robert	<b>SP</b>	<b>NF</b> Luke Consultants: Bob & Michelle	<b>NT</b>
<b>SP</b>	<b>SP</b>	<b>NF</b> Robert Jeff	<b>NT</b> Margaret
<b>SJ</b> Maureen Kathy	<b>SJ</b>	<b>NF</b> Marie	<b>NT</b> Rick Greg

**SJ**—Guardians: Help stabilize parish, consolidate strengths. Strong sense of responsibility. Want to be seen as reliable and dependable. May be too bureaucratic; keep using same approach when something new is needed.

**SP**—Artisans: Troubleshooter; want to do things as they see fit. Want to be seen as risk takers, clever, resourceful, being spontaneous and playful. Can be too utilitarian and practical.

**NF**—Idealists: Catalyst; focused on values, vision, dreams, possibilities. Seeking something unique, special. Want to be seen as authentic, inspirational, and inclusive. Can be too optimistic, naïve.

**NT**—Rationals: Architect and builder of systems; logic and originality. Want to be seen as competent, logical, as good at analysis. May be too competitive and aggressive.

## Team Profile: Functions

*Communication issues, team direction*

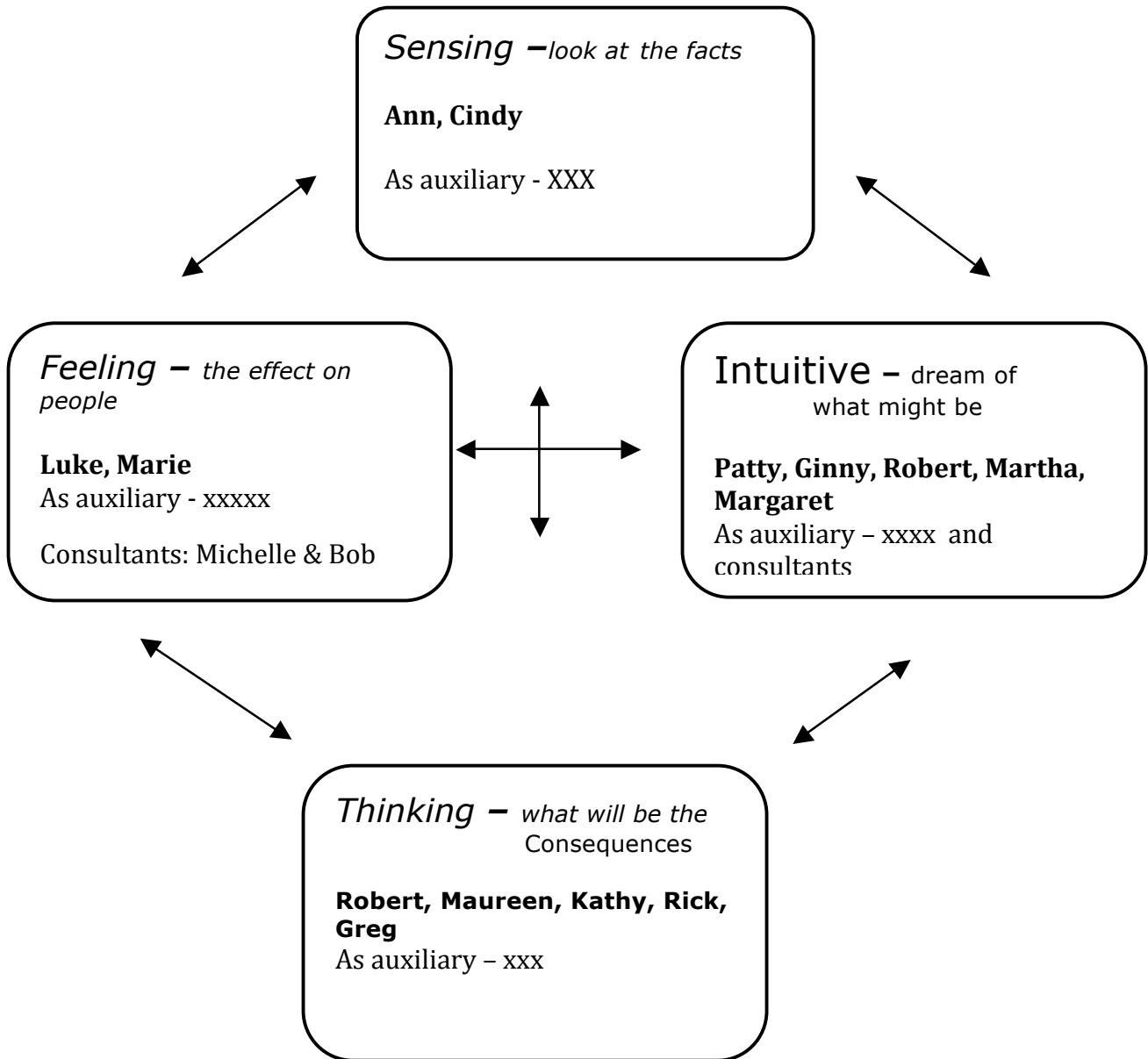
1. Place team members in the appropriate function area.
2. Discuss – in terms of communication processes --- what are the team’s likely strengths, weaknesses, areas of tension, and other dynamics?

<b>ST</b>	<b>SF</b>	<b>NF</b>	<b>NT</b>
<p>What steps are needed to get the job done? What will the cost be? What information is needed?</p>	<p>What will be the impact on people? What can be done to help people?</p>	<p>Who will be involved in the decision-making? What are our core values in this work?</p>	<p>What new ways of approaching this are available? What are related theories and models?</p>
<p><b>Ann</b> <b>Robert</b> <b>Maureen</b> <b>Kathy</b></p>	<p><b>Cindy</b></p>	<p><b>Patty</b> <b>Ginny</b> <b>Luke</b> <b>Robert</b> <b>Jeff</b> <b>Marie</b></p> <p>Consultants: Michelle &amp; Bob</p>	<p><b>Martha</b> <b>Margaret</b> <b>Rick</b> <b>Greg</b></p>

# Team Profile: Decision Making

*Exploring dynamics in decision making, problem solving*

1. Place team members in relationship to their dominant function (might also note auxiliary)
2. How could the team accept and use the strengths it has while also paying attention to all functions in decision-making?



ORGANIZATIONAL CHARACTER From *Working With Organizational Character*, Bridges & Edgelow

<p><i>Extraverted organizations</i></p> <ul style="list-style-type: none"> <li>• Have open boundaries</li> <li>• Allow access to decision making</li> <li>• Collaborate on decisions</li> <li>• Act quickly</li> <li>• Experiment with several possible lines of action</li> <li>• Trust oral communication</li> <li>• Encourage interdepartmental cooperation</li> <li>• Turn outside for guidance</li> <li>• Seek assistance when in trouble</li> <li>• Invite outsiders to celebrations</li> <li>• Have as a motto .'</li> <li>• The answer is out there-we just have to find it"</li> </ul>	<p><i>Introverted Organizations</i></p> <ul style="list-style-type: none"> <li>• Have closed boundaries</li> <li>• Prevent access to decision making</li> <li>• Reach consensus after a decision is made</li> <li>• Respond only after study</li> <li>• Explore options in detail, then try one line of action</li> <li>• Trust written communication</li> <li>• Experience interdepartmental mistrust</li> <li>• Insist guidance must come from within</li> <li>• Circle the wagons when in trouble</li> <li>• Keep celebrations "in the family"</li> <li>• Have as a motto "The answer is within-we just have to figure it out"</li> </ul>
<p><i>Sensing organizations</i></p> <ul style="list-style-type: none"> <li>• Are at their best with detail</li> <li>• Can handle masses of data Prefer solid routines</li> <li>• Prefer incremental change</li> <li>• Make improvements</li> <li>• See Intuitive organizations as lost in the clouds</li> <li>• See the future as an extension of the present</li> <li>• Emphasize targets and plans</li> <li>• Trust experience and authority</li> <li>• Tend to organize functionally</li> <li>• Have as a motto "Change the structure'.</li> </ul>	<p><i>Intuitive Organizations</i></p> <ul style="list-style-type: none"> <li>• Are at their best with the big picture</li> <li>• Can spot emerging trends</li> <li>• Are a little careless about routines</li> <li>• Prefer transformational change</li> <li>• Change "paradigms"</li> <li>• See Sensing organizations as stuck in the mud</li> <li>• Believe the future can be created</li> <li>• Emphasize purposes and vision</li> <li>• Trust insight and creativity</li> <li>• Often Use cross-functional teams</li> <li>• Have as a motto "Change the belief systems"</li> </ul>
<p><i>Thinking organizations</i></p> <ul style="list-style-type: none"> <li>• Make decisions based on principles</li> <li>• Think in terms of rules and exceptions</li> <li>• Value what-is-Logical</li> <li>• Emphasize the objective</li> <li>• Believe criticism leads to efficiency</li> <li>• Encourage employees to live up to expectations</li> <li>• Are a social machine</li> <li>• Have as a motto "Do the right (or intelligent) thing"</li> </ul>	<p><i>Feeling Organizations</i></p> <ul style="list-style-type: none"> <li>• Make decisions based on values</li> <li>• Think in terms of particular human situations</li> <li>• Value what-we-care-about</li> <li>• Emphasize the people</li> <li>• Believe support leads to effectiveness</li> <li>• Encourage employees to do their best</li> <li>• Are a social community</li> <li>• Have as a motto "Work well together"</li> </ul>
<p><i>Perceiving Organizations</i></p> <ul style="list-style-type: none"> <li>• Keep options open and seek more information</li> <li>• May be weak in decision making</li> <li>• Set general standards</li> <li>• Leave many things vague and undefined</li> <li>• Are loose and fairly tolerant</li> <li>• Have as a motto "Don't miss a opportunity"</li> </ul>	<p><i>Judging Organizations</i></p> <ul style="list-style-type: none"> <li>• Drive toward decisions</li> <li>• May be weak in information gathering</li> <li>• Set clear, specific standards</li> <li>• Define lots of things in detail</li> <li>• Are often moralistic</li> <li>• Have as a motto .Fish or cut bait"</li> </ul>

**Trinity 2012 vestry**

**E - 8 I - 7 S - 5 N - 10 T - 8 F - 7 P - 5 J - 10**

**Therefore Organizational Character:**

**-- by the numbers - NJ**

**-- by clergy leadership - INFJ**

## Focusing on Strategic Issues

*From Interventions: Methods and Processes for Building Healthier Parishes, Vol I, coming in 2013 Michelle Heyne & Robert Gallagher*

### The Demand System

*Heavenly Father, in you we live and move and have our being: We humbly pray you so to guide and govern us by your Holy Spirit, that in all the cares and occupations of our life we may not forget you, but may remember that we are ever walking in your sight; through Jesus Christ our Lord. A Collect for Guidance,  
--The Book of Common Prayer*

The prayer rightly assumes that we lose track of what's most important. We get caught up in all the "cares and occupations of our life." We just do, and we will.

In organization development there's an assumption that all organizations have a "demand system." That demand system is the web of expectations and pressures calling for energy, time and money. The demands may be external or internal. All parishes have the regular flow of work it must attend to. There's the occasional crisis, problems to solve and deadlines to meet. We also get caught up in work that just isn't very important to what we exist to do and be. Some meetings, phone calls and e-mail are like that. Most of us also have routines that are in fact either busy-work or time wasters. All those things, the important and the unimportant, consume most parishes and most of our individual lives.

The activities that transform parish and personal life can take a back seat to the routine business that must be done and to the unimportant interruptions and trivia of life. What renews life and develops the parish waits for when there's time. This means relationships don't get built, people don't receive training and coaching in spiritual practices, strategic issues aren't addressed, and so opportunities are missed and crises not foreseen and prevented. These transformational activities, specifically because they aren't front-and-center in most people's expectations, and specifically because no immediate disaster will take place if they aren't attended to, generally do not form part of the existing demand systems of most parish churches.

We can turn all that around by consciously adding elements to the demand system. We need to add activities and resources into parish life—literally put them on the calendar—that keep the important, transformative matters in front of us. In congregational development it means things like a yearly leadership retreat that works only on strategic matters; having a skilled external consultant; leaders receiving in-depth leadership training for congregational development, and developing a richer parish life of prayer through the Daily Office, and increasing the ability of members for participation in the Eucharist and their own personal devotions.

In relationship to spiritual practices it may mean taking actions such as:

- Scheduling Evening Prayer Monday through Friday and recruiting teams of two or more people to cover each evening.
- Parish clergy changing their schedule so they can be at Evening Prayer most days.
- Creating and scheduling a Foundations Course, with at least three units of three sessions each per year.
- As Stephen Covey said, "The key is not to prioritize what's on your schedule, but to schedule your priorities."

### ***There's a need for partnership with the diocese***

Partnerships between parish and diocese can be simultaneously supportive and frustrating. Will Schutz, who has worked with NASA, AT&T and the World Bank, maintains that all such relationships need to attend to three recurring phases:

**Inclusion**

Accepting the need for all parties being at the table, that each brings something necessary. From the diocese: an acceptance of the validity and need for this parish and this initiative. From the parish: a need for the perspective and resources of the diocese.

**Control**

The need for both parish and diocese to have appropriate influence in the relationship. From the parish: a sense that they are maintaining control over their own future, that they aren't being micro-managed from "above." From the diocese: a sense that they are able to have enough influence to be responsible stewards of the diocese's resources and reputation.

**Openness**

The need for a direct, timely, respectful, and thorough exchange of feelings and thoughts.

Both parties have some common needs, including that they end up with a parish large enough to be financially self-sustaining in a reasonable period of time. To do this requires, 1) that the initial decisions be set up to maximize the likelihood of adequate growth; and, 2) that the parish and the diocese create an ongoing mutual accountability in their efforts to get to a size that is self-sustaining.

***There's a need for the parish to live within a context of health & growth***

This is about creating a context that keeps drawing Trinity back to the issues of health, viability and growth. Leaders need to identify the resources available locally and nationally to help establish such a context. Many dioceses have consultants available. It's worth getting information on the training and experience of the consultant before agreeing to a contract. Some dioceses have a program in congregational development, such as Shaping the Parish™ or the Church Development Institute.

We can be unmindful of the web of expectations, pressures, and beliefs that inhibit our ability to do what's necessary for a healthier parish. We get driven along through the weeks and years by the routine demands of parish life. We assume there will be a time when we have the time to work on all the strategic and truly important developmental possibilities. It's a never to arrive time in the future. Developmental work occurs when we make it part of our demand system by creating a parish development team, using a skilled external consultant, having a yearly leadership retreat that is only about strategic and developmental concerns, and attending a program like Shaping the Parish™.

For a parish, or any organization, to develop, it needs to give attention to strategic issues, including building its capacity through the development of its members and staff, capital improvements, and attending to long-range or systemic concerns. The chart below draws on the thinking of Stephen Covey. In Organization Development terms it explores the way the demand system works.

What the chart shows is how some things have urgency because the system is arranged in a manner that draws our attention. The parish has certain routine activities and existing groups that "demand" our energy and time. Because we expect coffee hour on Sunday some members do the shopping and setting up. Many participate because it's there to participate in. Because there is a financial committee meeting very third Wednesday people commit the evening and some do the needed advance work. Because June is agitated about the selection of hymns two members listen to her for 20 minutes after Mass. The parish's routine business, and even the interruptions, have a built in urgency that call on us to pay attention to them.

Other things can wait. They don't press themselves upon us. They are not urgent matters; even if they are important; even if we acknowledge their importance when asked. Few people notice if we don't do them. Creating and conducting an adult formation program, increasing Eucharistic competence, coaching people in prayer life, may all be seen as worthy activities. But if they aren't done few object.

In understanding how this works we can confuse ourselves by using the word "should." As in - "people 'should' feel an urgency about developmental matters." Maybe we "should" but we rarely do. Developmental work doesn't get experienced as pressing.

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<p><b>I. Normal Parish Business</b></p> <ul style="list-style-type: none"> <li>• The regular flow of work that the parish exists to do and does in support of that (such as the Eucharist and the choir rehearsal)</li> <li>• Crises</li> <li>• Pressing problems</li> </ul>	<p><b>II. Parish Development</b></p> <ul style="list-style-type: none"> <li>• Building parish capacity for health and the primary task</li> <li>• People development, an increase in competence for managing their spiritual life or doing the institutional work of the parish</li> <li>• Relationship building and trust development</li> <li>• Establishing a direction to move in (planning, visioning, identifying the three things that would most improve parish life)</li> <li>• Engaging new opportunities</li> </ul>
<i>NOT IMPORTANT</i>	<p><b>III. Interruptions</b></p> <ul style="list-style-type: none"> <li>• Some mail, phone, meetings, reports.</li> <li>• Other people's inconsequential issues.</li> </ul>	<p><b>IV. Trivia</b></p> <ul style="list-style-type: none"> <li>• Busy work</li> <li>• Some mail, phone calls, meetings</li> <li>• Time wasters</li> </ul>



**How to Improve the Parish's Health:**

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<b>I. Normal Parish Business</b>  <b>MANAGE</b>	<b>II. Parish Development</b>  <b>FOCUS ON</b>
<i>NOT IMPORTANT</i>	<b>III. Interruptions</b>  <b>AVOID</b>	<b>IV. Trivia</b>  <b>AVOID</b>

**Ways to Focus the Parish on Strategic Issues**

Manage the parish's routine life and business in a competent, thorough and efficient manner. Take care of what must be taken care of and do that well.

In order to get at the developmental issues work at establishing structures and processes (i.e., organizational behaviors) that focus on quadrant II. Examples include:

- A yearly leadership retreat focused on strategic issues, with at least the vestry and rector and perhaps with other key leaders.
- Use of a congregational development consultant.
- Placing on the parish schedule things like: Adult Foundation Courses sessions in the winter, spring and fall, annual quiet days and spiritual retreats,
- Establishing a pattern of only dealing with strategic matters during every other vestry meeting or creating a strategic management group to focus on those matters while the vestry attends to more routine issues related to property and finances.
- Form and train a parish development team. If your diocese has a Shaping the Parish program or a Church Development Institute use the program to support and equip the team.

What you're doing when you do these things is creating a new "demand system." A yearly leadership retreat will usually generate energy among those attending. People will want to follow through on the ideas and decisions of the retreat. Things will be accomplished in the following months. And after several months the momentum created by the retreat will lessen. But for a few months it will have served as a demand system for important issues.

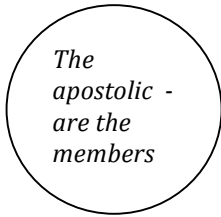
Giving adequate time to strategic issues is likely to result in an organization that has a sense of vision, balance, discipline, and fewer crises. Again, one of Covey's central propositions is that a key is learning to schedule your priorities rather than trying to prioritize your schedule. Organizational leaders need to strive for about 25% of their working time in Quadrant II.

## **Processes and structures to help a parish stay focused on developmental and strategic issues**

- Have the person with passion about an issue take the lead. This assumes that the person is willing to work within a process of listening to the larger community and be responsive to the priest's views on priorities and action.
- Recognize that nothing will happen if the rector (vicar, priest in charge) isn't committed to it. This is a simple reality of organizational life.
- Working Groups. Create groups based on the energy of the moment. Assume two to four months of work before the energy fades. Create objectives for the group that can be accomplished in that time frame. Assume work will get done in spurts of energy.
- Leadership Conference/Retreat. A weekend with two other parishes around a specific issue they have in common. Time at the conference will shift between all of the parishes simultaneously receiving some training or instructions from the consultants, to each parish doing its own work with the consultant moving among the parishes. Possibly have follow up check-in meetings a few times over the next year, something that specifically creates an external demand system to support strategic initiatives. Assume a second conference/retreat the following year. Consider opening the retreat to others in the parish beyond the vestry, especially to people who might follow through on the work. The agreement needs to be: Come to the retreat if you will fully participate and be willing to do follow up work for the next two to four months.
- Structure the vestry's time use. Try doing every other meeting on only developmental and strategic issues (no routine reports or business), OR use the first half of all meetings for developmental work. Don't meet every month. Don't have a vestry meeting in the same month the vestry has a leadership conference.
- Have focused times of check-in, input and testing with the whole congregation. Don't do so much of this that there's little time for getting work done.
- Use the consultant's time. The consultant's presence can help draw attention to the strategic issues. There may also be a value in having the consultant focus on any special areas of expertise he or she brings.

# The Parish Church: three images

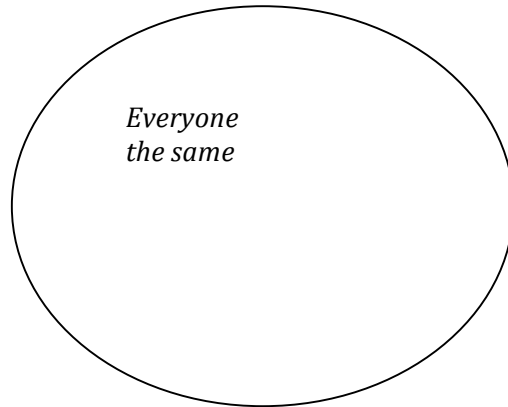
## Parish as cult



Everyone else –  
not members

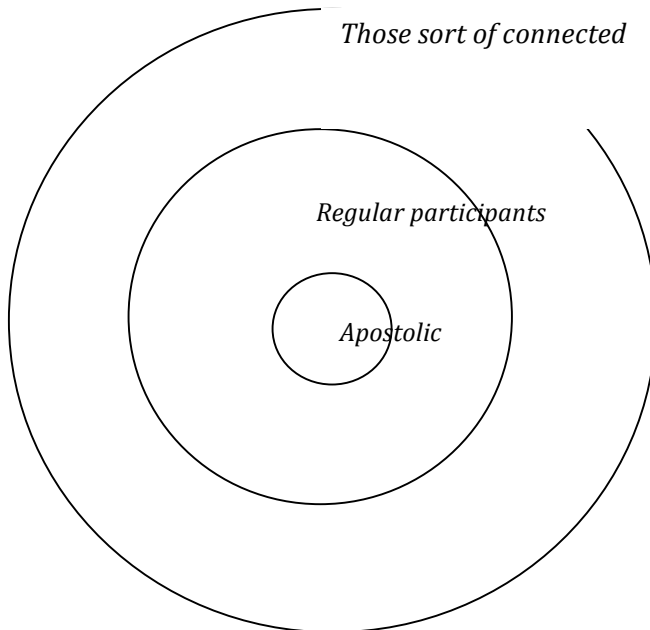
Tends toward: arcane elite; self-deception and illusion. Henri Nouwen wrote: *Confrontation without receptivity leads to an oppressive aggression which hurts everybody.*

## Parish as multitude



Tends toward: conformity and conventional religion; little spiritual growth, self-deception and illusion. Henri Nouwen wrote: *Receptivity without confrontation leads to a bland neutrality that serves nobody.*

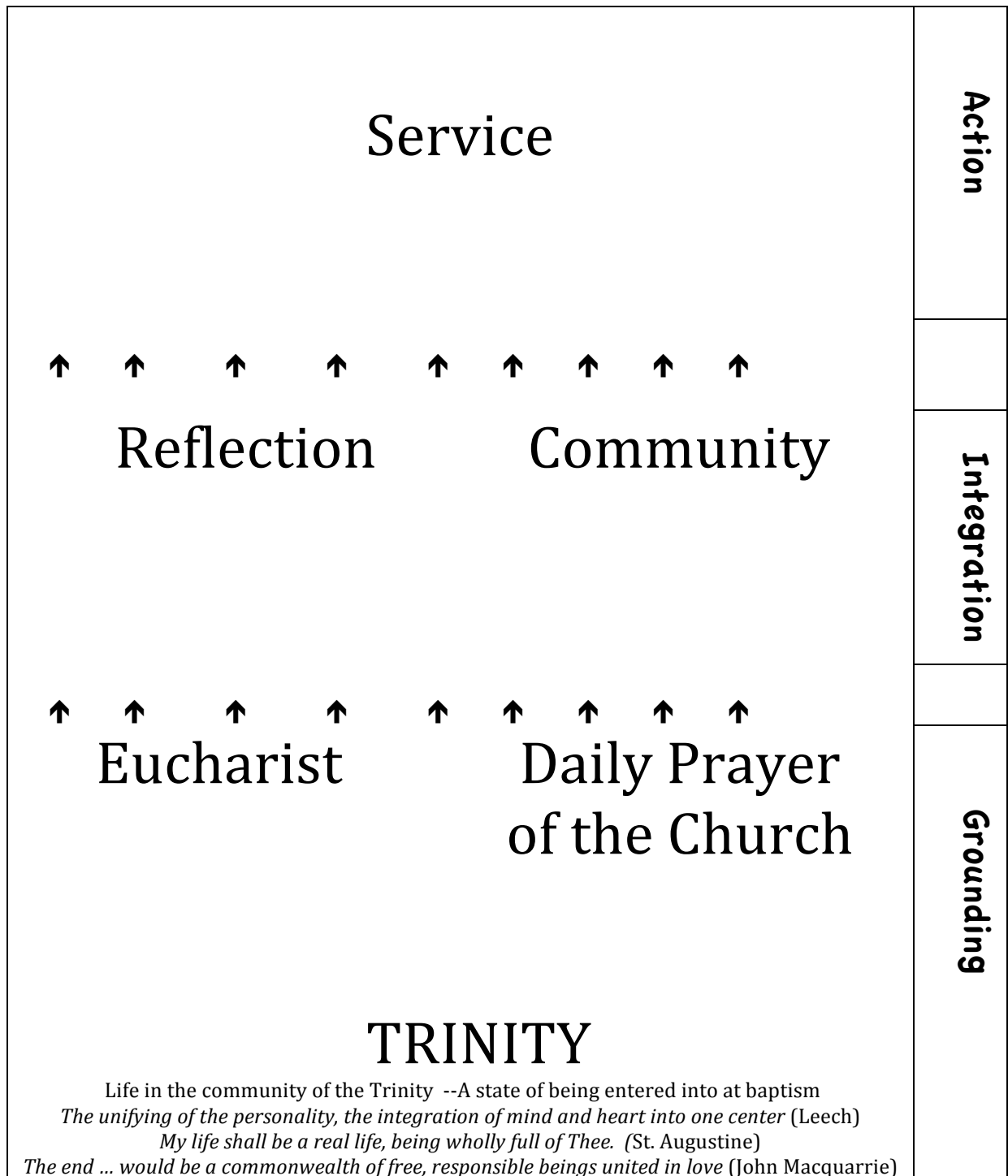
## Parish as a mixed body



### An Anglican pastoral theology

- The church is for all. There is a place for our Anglican humanism.
- The fully apostolic life is lived by few in each parish. There is a place for our Anglican stress on holiness.
- The practice of our faith involves discipline, and growth; both acceptance as we are and an invitation/challenge to mature and grow. There is both receptivity and confrontation.
- Our Lord obviously cared for the crowd, the multitude. He also spent most of his energies in the formation of a small group of disciples.
- How is a parish to live in such a way that it is *for* all while at the same time it forms us for holiness? Our tradition suggests an acceptance of the many with the fuzzy boundaries that accompany such a stance *and* an intentional nurturing of those ready to go deeper.

# A Map: Spiritual Practices



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 From *In Your Holy Spirit: Shaping the Parish Through Spiritual Practices* Robert Gallagher, Ascension Press, 2011

# A map of spiritual practice for the parish

## **I. Weekly Practice**

The Holy Eucharist celebrated several times each week as to allow people with a variety of schedules to find one that might serve as their weekly spiritual practice.

## **II. Daily Practice**

There are two things to do here. The first is to equip and support parishioners in saying the Daily Prayer of the Church in their own in the course of daily life. The second is to offer the Daily Office in some routine form on most days of the week.

## **III. Reflection**

There are two primary acts for the parish to take. One is to offer members assistance in identifying and maintaining ways of being reflective. The second is for the parish itself to engage in reflective processes -- ways of listening to and learning from it's own life as a community. The beginning place for this is to create an environment with significant space for stillness and silence. This kind of reflectiveness can naturally take a community into experiments with new ways to adapt what it has received.

## **IV. Parish Community**

The parish needs to provide opportunities for social life among parishioners and create an environment in which they may find and live what Augustine called a "real life;" a life in which they might be genuine, be open and honest about themselves, and still be in deep relationship with others and God. This is a community where our differences can be expressed and will be accepted; in which we can fight with those we love without fearing the loss of the relationship.

## **V. Serve**

The parish can hold in front of its members the moral vision of Christian Faith. The primary place, the most effective place, of service for the Christian is in his or her daily life. We serve within our friendships, families, work, and civic life. The parish can help members identify how they serve, how they may better serve, and the gifts each brings to that task. The parish can also have at least one service ministry that is done as a parish.

## **VI. The process of change**

The parish can provide a foundations program that equips people to take responsibility for their own spiritual life and moral action in daily life. It can also model an approach to change of experimentation and learning from experience. It can teach methods that allow people to face change

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# Assessing your spiritual practices

## Sunday Eucharist

### 1. Attendance (circle one)

About 1/4 of the time      Half the time      ¾ of the time      Just about every Sunday

### 2. My ability to participate (Circle the number that is closest to your experience)

I am frequently confused  
and uncertain about how  
to participate

I can “flow” with it. I  
mostly don’t need a  
Prayer Book or leaflet.

1

2

3

4

5

## Participating in the Daily Prayers of the Church

### 3. Doing the Office in some form on my own or with others

Never

Only when offered at a  
meeting or retreat

Sporadically or at during some  
season(s) of the church year

Most days

### 4. Knowing how to do the Daily Office

I have no idea.

I understand how to use  
it in the Prayer Book and  
ways to innovate the use

1

2

3

4

5

## Disciplined ways of reflecting [“Listen to your life”]

Grounding/centering yourself so you can reflect. The spiritual practice of “pondering” and seeking God’s presence in the people, circumstances and things of life. Practices that connect daily life to God.

### 5. Ways that work for me

I don’t have ways  
that work for me

I have ways that are  
effective for me

1

2

3

4

5

## Participating in the parish community

6. The community I seek is one in which people are free to be themselves; to speak and listen fully and authentically. In which differences are accepted (we can fight with those we love). In which we can make decisions and solve the problems we face.

I don’t want church  
to be that way

It is what I seek;  
and more

1

2

3

4

5

**7. Connection with people**

I don't know anyone well

I know a number of people and have a few friends in the parish

1 2 3 4 5

**8. Participation in parish social life**

Not at all

I participate regularly and frequently

1 2 3 4 5

**Service**

**9. In Daily Life**

I don't have a clear understanding of how I serve in my daily life

I am very clear about serving in daily life

1 2 3 4 5

**The process of spiritual growth**

**10. Foundations**

I have a poor foundation in the spiritual practices of the church

I have a strong foundation in the spiritual practices of the church

1 2 3 4 5

**11. Experiment**

I don't know how or feel confident enough to experiment with spiritual practices

I have a sense of how to innovate & experiment with spiritual practices.

1 2 3 4 5

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From *In Your Holy Spirit: Shaping the Parish Through Spiritual Practices* Robert Gallagher, Ascension Press, 2011

## Some Tools & Processes

### CHANNELING PROCESS: Parish Church Use

The goal in this process is to gather information on the “rubs” people are experiencing in the parish, e.g., concerns, new ideas for improvements, etc. The process is done regularly and frequently to keep issues in a process planned change and renegotiation. It is also designed to help the parish’s leadership stay in touch with the system.

There are two primary ways that most parishes can make productive use of a Channeling Process:

1. As part of a parish conference or community meeting – a yearly gathering, open to all members; use the process to allow comments on any aspect of parish life.
2. The Vestry and Rector do the process about six months after #1

### The Process

1. On newsprint, gather the team’s “rubs” in two columns

<b>date</b>	<b><u>CONCERNS</u></b>	<b><u>WISHES FOR IMPROVEMENTS</u></b>

Record all comments. Use the speaker’s words.

2. Have the team prioritize items in each column.

-Give each person one vote for every 3 or 4 items in a column. Members of the team go up to the newsprint to place a check mark showing their votes.

-Do not try to “group” items that seem alike until after the voting.

3. On another sheet of newsprint, list the priority items and indicate a follow-up action for each.

<b>date</b>	<b><u>PRIORITY ITEMS</u></b>	<b><u>FOLLOW UP</u></b>

The follow up action listed would be along the following lines:

- a person (or special team) agreeing to do some work on the issue and report back to the whole team
- a person (or special team) being authorized to take action as they see fit
- agreement to consider the issue at a future meeting the team for problem solving or strategy development
- Items could be referred to the vestry.

### Variations

- The use of a broad system assessment process may help the Channeling Process cover a broad field while also focusing on critical elements of the parish system
- Focus the process on a specific area of parish life, e.g., spiritual formation, adult education.

© Robert A. Gallagher, 1992, 2001



## LIKES-CONCERNS-WISHES: ASSESSMENT WORKSHEET

**1. What is your overall satisfaction with the life and work of the organization?**

**VERY LOW  
SATISFACTION**

**VERY HIGH  
SATISFACTION**

1	2	3	4	5	6

**2. Offer your thoughts about the organization’s functioning using the categories below.**

<b>LIKES</b> What you like/affirm about the organization’s work and life.	<b>CONCERNS</b> Your concerns about the organization’s life and work.	<b>WISHES</b> Your wishes about what the organization might do to improve its work and life.

**3. Circle the items, in each category, that you see as most important to the long term health of the organization.**

**4. Put a check mark next to the items that could be most easily addressed.**

*Around the circle*

This is a useful method allowing everyone to be heard. Participants speak in turn around the circle. The comment is to be brief and on one point. I’ve used this method with up to 45 people. The method helps equalize the voices in the room so the more hesitant are heard along with the more assertive. It can be especially useful when dealing with controversial issues. Variations include the fishbowl and the Samoan circle. The methods are defined in different ways by various facilitators. In both cases there is a group that sits within the larger circle of participants. The inner group is to consist of the various positions on an issue or might be an “expert panel.” Depending on your objectives and issues, such as the time available, the outer group might remain silent, or there might be an opportunity for comment or questions from the outer circle, or there might be a way for someone from the outer circle to join the inner circle.

*Testing*

In a testing process an issue is identified and a spectrum, scale, is created to reflect the views present in the community. For example,

We need to do less of this	We need to stay with the current amount	We need to do more of this
----------------------------	---	----------------------------

The “testing process” can be done for a few minutes at coffee hour, at vestry meetings, in working teams and at parish community meetings. It will usually be most effective if done when the group is gathered and can respond and discuss the result, formally or informally. Face to face processes are usually more effective in promoting careful listening and effective response. A rule of thumb might be to use a “testing process” about four times per year with the whole community and possibly ten times with the vestry.

*Arrangement of space*

Peter Block maintains that in arranging meeting space we are trying “to build relatedness, accountability, and commitment.” “Physical space is more decisive in creating community than we realize. Most meeting spaces are designed for control, negotiation, and persuasion...Community is built when we sit in circles, when there are windows and the walls have signs of life, when every voice can be equally heard.” Block prefers that there be no tables.

Circles provide a sense of closeness, allow people to better notice body language, and invite people to lean in toward one another. When the work involves processes such as brainstorming, group problem solving or strategizing, or the use of a method such as force field analysis or SWOT, the circle can be opened at an end to allow the use of newsprint pads for recording the work. In those cases the objective is to maximize the ability of people to see one another and the workspace with the newsprint pads.

*Use of newsprint (flip chart pads)*

Using newsprint pads to record the group's thinking can improve participation, reduce repetition, and help people feel heard.

The best arrangement is to have pegs in a wall allowing a couple of pads to be hung. It's better use of space, reduces the number flip chart easels a parish needs, and eliminates the temptation to "flip" the page over and thus hide the work just completed.

## I-C-O Group Development Model Inclusion – Control – Openness

Will Schultz’s “The Human Element” model provides an approach to group development grounded in emotional intelligence.

**Movement is from bottom to top.** There is a sequence to interpersonal and leader – member relations. Adequate resolution of a group development issue allows the group to attend to the next stage up. As inclusion grows the group’s capacity for handling control grows. To the extent there is resolution the group may deal effectively with the next stage issues. Resolutions are all temporary.

Issue	Am I?	Group Development	Underlying feeling	Fears
<b>Openness</b>	Open/Closed	How open will I be? How close can I get?	Likeability, lovability	Being rejected. Being unlikable, unlovable
<b>Control</b>	Top/Bottom	How much influence, power and responsibility will I have? Issues of leadership and decision-making processes.	Competence	Being humiliated, embarrassed. Being incompetent, phony
<b>Inclusion</b>	In/Out	Inclusion compatibility is central in the early stage. How will I fit in this group?	Significance	Being ignored. Being insignificant, worthless

Note: Openness - Earlier version called this affection

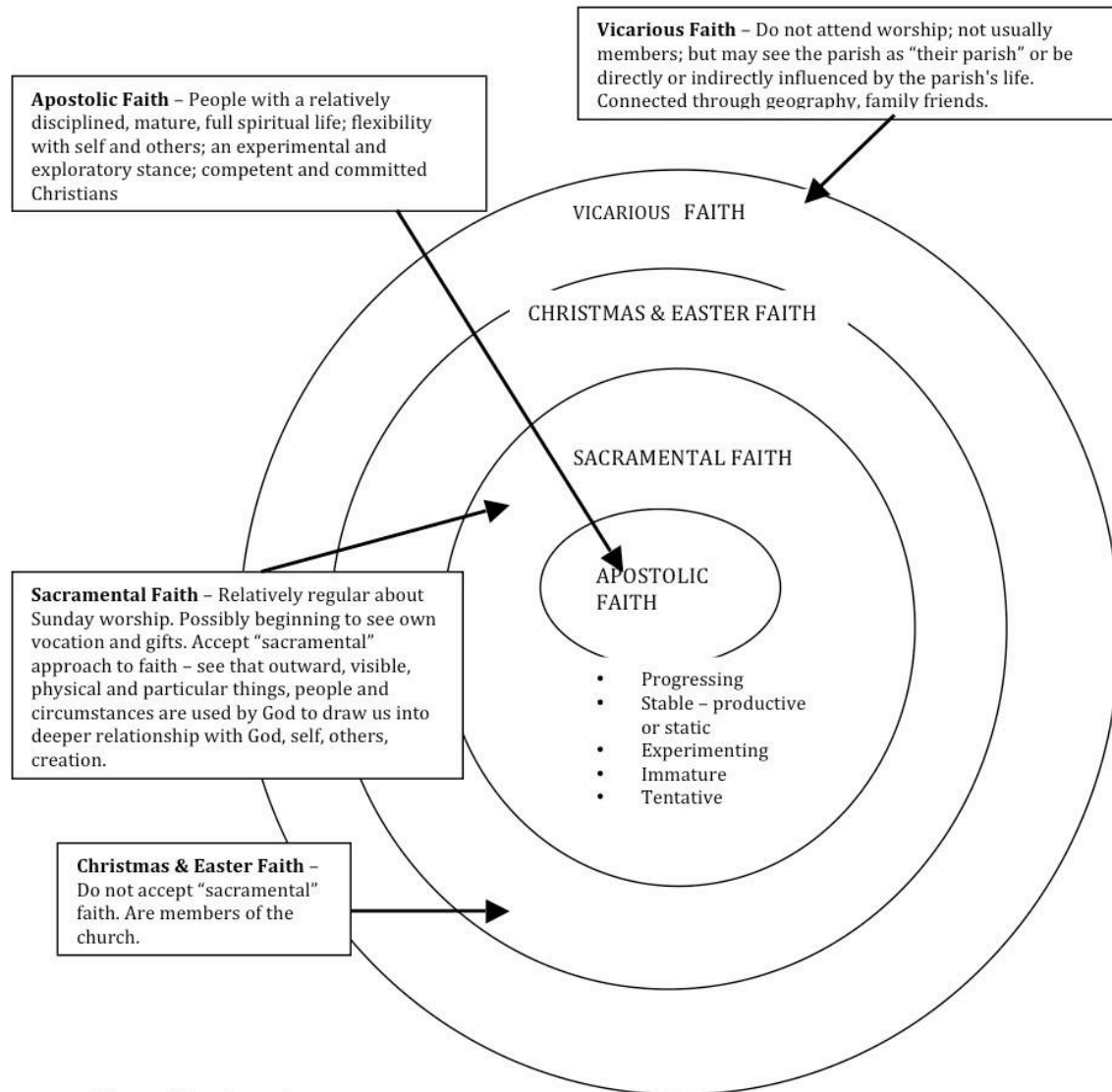
Issue	Compatibility Ability of people to work well together	Concordance decision making criterion
<b>Openness</b>	A primary issue in long term relationships	Everyone on team agrees to be totally open about their feelings and thoughts on the issue
<b>Control</b>	A primary issue in moderately long relationships	All on team have equal power. Each person has a veto.
<b>Inclusion</b>	A primary issue in short term relationships	Team consists of those with the most knowledge and those most impacted

**Compatibility** - Ability of people to work well together; ability of our personalities to enhance and support each other, be complementary. Having differences in personalities or positions doesn’t cause problems. Rigid adherence to positions rooted in low self-awareness and self-esteem does cause problems.

### **For more information**

There’s a great deal more to Schultz’s model. It’s worth reading his book and exploring the web site. Book – *The Human Element*, Will Schultz, Jossey-Bass, 1994. Web site - [www.thehumanelement.com](http://www.thehumanelement.com)

## The Shape of the Parish



The model can be used:

- To assess the health of a parish, and
- In developing a strategy that deepens the parish's spiritual life, while staying open the various places people are in their faith journey.

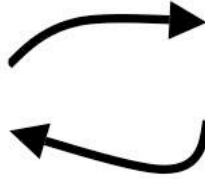
From *Fill All Things: The Spiritual Dynamics of the Parish Church*, Robert A Gallagher Copyright 2008  
 "Shape of the Parish" Diagram -- Robert A. Gallagher/Mary Anne Mann, 1983; Revised RAG 1999, 2003

## The Renewal – Apostolate Cycle

The Renewal - Apostolate Cycle is a way of describing a central dynamic of Christian life. The Cycle focuses our attention on the Christian's movement between being renewed in baptismal identity and purpose and living as instruments of God's love and grace in daily life. The Cycle is interested in both the individual's movement and in the ways in which the parish church supports and facilitates that movement. This is the primary task of any parish church.

### RENEWAL

Renewal in baptismal identity and purpose in worship, study, the parish's social life, and being equipped for Christian action



### APOSTOLATE

Participation in the work of Christ in service, evangelization and stewardship

In areas of:

- Workplace
- Family & Friends
- Civic Life
- Church

### A Cycle

The cycle is between a conscious and intentional attention to God, prayer life, our relationships, Christian formation **and** a subconscious reliance upon God as members of the Body of Christ, in the workplace, family, friendship, civic life and congregational life.

### In that Cycle:

#### We need:

To accept our dependence on God

To accept responsibility for ordering our spiritual life

To accept our interdependence with others in the Church

#### Which is helped by:

Openness to spiritual guidance

Establishing a rule of life

Life in Christian community, a parish church

#### Which the parish helps by:

An emphasis in its life on worship; nothing comes before the Eucharist and Daily Office. Also, more attention to formation and spiritual growth than other programs or ministries.

Offering programs and guidance in creating, experimenting with, and revising a spiritual discipline.

Being a healthy and faithful parish church and by helping people relate to the parish community in ways appropriate to their personality and the parish's capacities. Having opportunities for social life and the development of friendships.

From *Fill All Things: The Spiritual Dynamics of the Parish Church*, Robert A Gallagher, Ascension Press, 2008

## Consultants



**Michelle Heyne** brings empathy, humor, and a solid grounding in ecclesiology and effective organizational dynamics to her work as a trainer and consultant. She is committed to helping parish leaders bring about effective change by developing the skills they need to make the most of the gifts they already have. She has worked as a financial services executive for over 25 years and served as a parish lay leader for 15. Michelle lives in Seattle.

Michelle served as part of the training team with the Diocese of Washington and national Shaping the Parish and the earlier Church Development Institute in that diocese. She is a consultant in the financial services industry for organization development and compliance issues. Michelle has extensive experience with financial management, interpersonal communications and team dynamics, and developing and implementing organizational change initiatives. She has non-profit experience in the areas of team building, strategic planning, and conflict management. She attends St. Clement's Church, Seattle



**Robert Gallagher** brings 40 years of experience in leadership training and parish development. Bob offers exceptional skills in facilitating shifts and changes in people and organizations. He provides practical methods and vision for a transformed parish. Bob has a masters degree in Organization Development from Goddard College and an MDiv from EDS. Bob lives in Seattle.

He's been a consultant and trainer in religious systems, non-profit organizations and small businesses since 1970. Bob has been a parish priest; on the staff of or consultant to ecumenical training organizations, an industrial mission and metropolitan and state councils of churches. He served as the congregational development officer for the Episcopal Diocese of Connecticut from 1981 - 88. He has consulted with hundreds of congregations. He has served as adjunct faculty in congregational development at Hartford Seminary and Seabury-Western Theological Seminary. He was Director of the Church Development Institute at the General Theological Seminary from 1985 - 2000 and continued as the Director of the Church Development Institute - Seattle until in 2011 when that changed to Shaping the Parish. For a number of years Bob served as the Associate Priest for Ascetical and Practical Theology at Trinity Church, Seattle. He's currently an associate priest at St. Clement's Church in Seattle.