

Trinity Church Wilmington

Annual Leadership Retreat 2016

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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. It may also be used by the parish at a later time.

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 area of interest for this year:

1. A broad assessment of parish life and ministry.

- Get a read on how we see the current state of the parish

- Identify a few areas for deeper conversation and work. Begin that work.

Rationale - As we reviewed the work of recent years it struck us that we haven't done a broad assessment for a number of years.

2. A specific assessment and conversation on the vestry's work and new ways of working. We'd want to pay particular attention to how the changes are going; doing that within an assessment of the vestry's overall functioning.

Assessments such as this are not for the purpose of defining reality or making judgments. They are best used to begin structured and disciplined forms of parish conversations. The assessments we use offer a particular perspective grounded in the field of organization development and systems theory and incorporating a theological view of the parish church.

Schedule

Friday Evening ... Feast of Samuel Isaac Joseph Schereschewsky, Bishop of Shanghai, 1906

6:00 Social Time

7:00 Supper

7:45 Work Session: 1) Overview 2) Connecting 3) Getting started -

9:00 Compline - beginning with intro to doing the Office in a group (Michelle); then Compline Hymn 24

9:30 Social time

Saturday ... Feast of Teresa of Avila, Nun, 1582

8:00 Breakfast

9:00 Morning Prayer -- Ps 20 Matthew 11:7-15 Hymn 1

9:20 Work Session

10:30 Break

10:45 Work Session

12:00 Lunch

12:45 Work Session - 1) continue assessing work 2) how we get things done

2:15 Rest - Recreation

6:00 Supper
7:00 Work Session
9:00 Compline Hymn 24
9:20 Social Time

Sunday 22nd Sunday after Pentecost Proper 24

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

Connecting activity: What do you bring to the table?

There are certain core abilities needed for a vestry to be most effective: proficiency in Episcopal spiritual practices, ability to work as part of a team, understanding and acceptance of Episcopal Church polity regarding the parish church, skill in areas of work that are routine for the vestry of this parish.

Assess yourself and the vestry as a whole in each area

1. Proficiency in Episcopal spiritual practices – This is central because it has to do with those responsible for aspects of parish oversight “getting the business we are in.” It doesn’t mean that vestry members should be experts in pastoral and ascetical theology but that the vestry will work most effectively if members live the Christian life -- have a stated spiritual discipline, are at the Sunday Eucharist weekly, pray the Daily Prayers of the Church in some form, have ways of being reflective about their life and responsibilities, participate in some aspects of parish community life (e.g., coffee hour), and can articulate the relationship between faith and their daily life (in workplace, family and friends, civic life)

a. My proficiency in Episcopal Spiritual Practices

Needs attention	1	2	3	4	5	Is adequate or strong
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Notes:

b. My impression of the proficiency of the vestry as a whole

Needs attention	1	2	3	4	5	Is adequate or strong
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Notes:

2. Ability to work as part of a team – All groups have three interdependent elements to manage; there’s a task to work on, relationships to manage, and individuals come into a group with their own needs and wants. Each element has associated behaviors and skills that help effectiveness. The three elements that may work together in harmony or may come into tension. A group that is excessively task-oriented may get the job done but may build up resentments among its members because relationship and individual needs are not adequately addressed. A group that is overly relationship-oriented may enjoy being together, but let its task drift. The most effective groups are those that learn how to attend to all three aspects of the group’s life.

a. My skills for helping a team accomplish its task, manage its relationships and attend to individual needs and wants.

Low skill	1	2	3	4	5	High skill
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Notes:

- b. My impression of the skill of the vestry as a whole

Low skill	1	2	3	4	5	High skill
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Notes:

3. Understanding and acceptance of the Episcopal Church's polity regarding the parish church – For example, the role of the diocesan bishop in relationship to the parish and the rector/vicar, national and diocesan canon law in regard to the parish, the authority of the Book of Common Prayer, the parish in relationship to the diocese and diocesan convention, that a vestry is not a board of directors, etc.

- a. My understanding and acceptance

Low	1	2	3	4	5	High
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Notes:

- b. My impression of the understanding and acceptance of the vestry as a whole

Low	1	2	3	4	5	High
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Notes:

4. Clarity regarding the role of the vestry in this parish - Is the role the basic work of overseeing property and finances (as required in the canons)? To what extent is the vestry going to be involved in setting and monitoring the overall direction of the parish or participate in the strategic management task of navigating

the parish toward its goals and through its politics? Is this vestry willing/able to give the time needed given the extent of involvement desired? How much centralization do we want? – is everything to come through the vestry? Is there acceptance of legitimate independent action by the rector/vicar? What degree of self management do we want from working groups and committees?

a. My clarity

Low	1	2	3	4	5	High
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Notes:

b. My impression of the clarity of the vestry as a whole

Low	1	2	3	4	5	High
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Notes:

5. Competence in areas of work that are routine for the vestry of this parish

– The specifics of this will depend on how this vestry approaches the issues of role and centralization noted in #4 above.

a. My competence – the extent to which I bring skills that fit the work of the vestry in this parish

Low	1	2	3	4	5	High
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Notes:

b. My impression of the vestry as a whole - the extent to which we collectively bring skills that fit the work of the vestry in this parish

Low	1	2	3	4	5	High
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Notes:

6. *Overflowing into the parish's life* - Being effective at doing its work and managing its own internal life are the most obvious things for a vestry to engage. Beyond all that the vestry has another significant impact on parish life – it is the spirit that overflows from the vestry's life and manifests, or not, the Holy Unity of the church. In an October 2006 “Dearly Beloved” letter to the parish, Father Richard Downing, of Saint James Parish, Capital Hill, DC, wrote this (Note: I have slightly edited his words for this document.) *Leadership and sharing of gifts and talents, however, is not the sole task for our vestry. The whole is much greater than the sum of its parts as each carries within us a piece of a solution to a problem, a perspective that someone else doesn't know, unique experiences that inform our creativity and our compassion. The challenges in working together lie in shaping our actions and our words in consonance with our faith and belief in this communal strength, for it requires great personal discipline, an awareness of our own failings, and time and energy that we may often feel we do not have to give because of other very real demands at home and on our jobs. ...This act can set our hearts free in new ways that could be quite surprising individually and corporately. It extends well beyond just keeping St. James alive but makes it a place where as soon as a person enters our door, they will know Christ is alive, God is worshipped, and human beings are valued.*

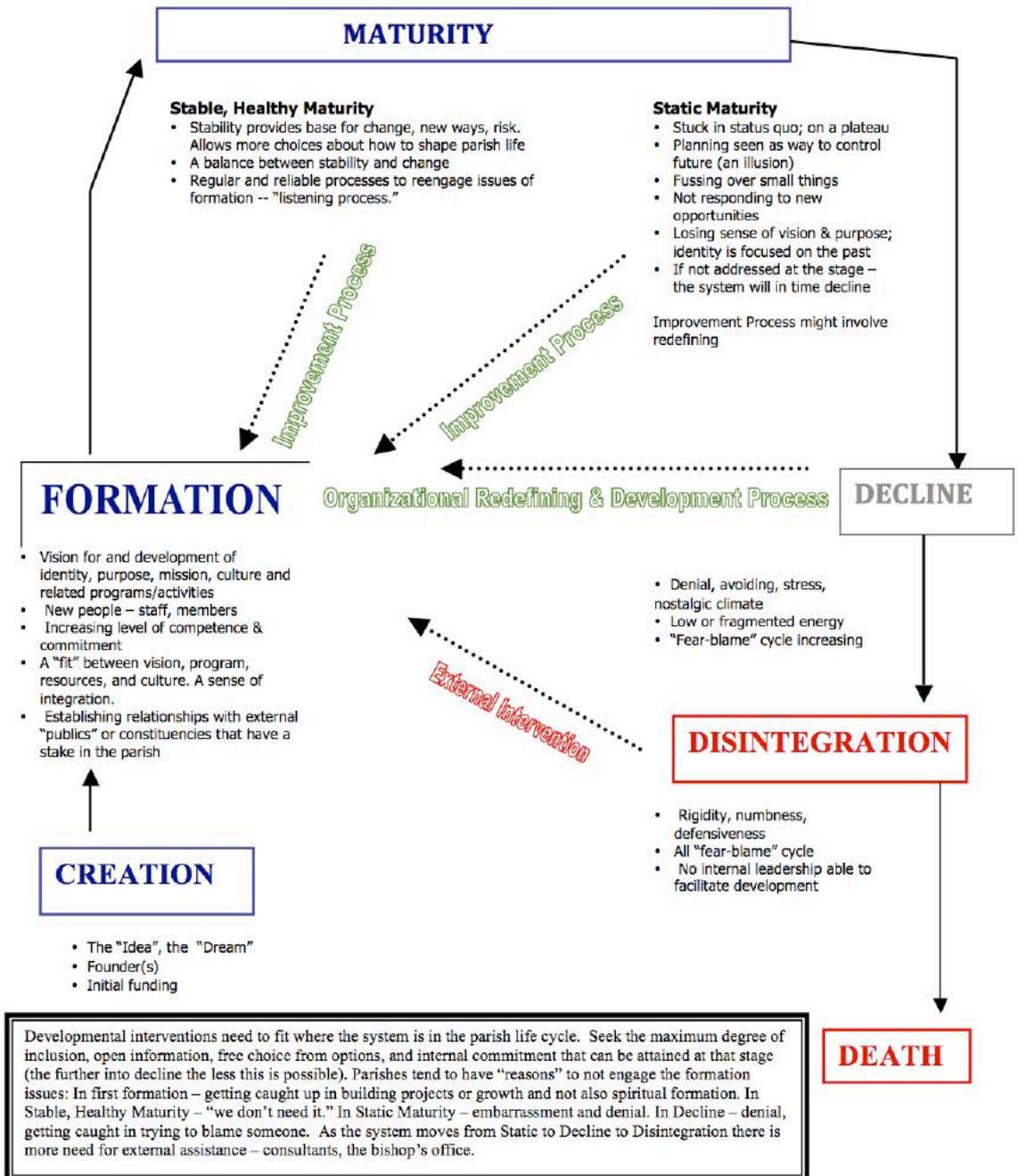
My impression of the degree to which this happens in regard to this vestry and parish

Not much	1	2	3	4	5	Very much so
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Notes:

Robert A. Gallagher & Michelle Heyne, 2015

PARISH LIFE CYCLE



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Key factors we see in healthy and faithful churches are those characterized by generally high ratings in six areas:

	Low				High
1. Overall satisfaction with parish life & ministry (Hard to get at other important elements if there is broad dissatisfaction or a generally flat emotional climate that lasts for a long period.)	1	2	3	4	5
2. Formation of adult members as Christians in the tradition of the Episcopal Church; resulting in Christians better able to live as responsible persons in society - the total impact of Liturgy, spiritual guidance, overall parish climate, programs. At least 1/4 of those present on Sunday are very competent in Anglican spiritual practice.	1	2	3	4	5
3. Vibrant - The extent to which parish life is vibrant, creates a "buzz" that excites the congregation and spills over to the wider community; an attractive energy. (Note: this isn't a matter of personality styles. A parish can be generally introverted or extroverted and be vibrant.)	1	2	3	4	5
4. Alignment - The elements of parish life are mostly in alignment: income-expenses, the energy and funds to carry out the vision we have; liturgical space or number of services to match the number of attendees, and so on	1	2	3	4	5
5. Sunday - Great Liturgy and social time together	1	2	3	4	5
6. An expression of the Divine Charity - The parish in its life as a community and in the work of its leaders is an effective instrument of God's love.	1	2	3	4	5

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Ways of dealing with conflict



This is offered in gratitude for the work of Saint Clement of Rome (100) and Saint Benedict of Nursia. (540)



Assessments such as this are not for the purpose of defining reality or making judgments. They are best used to begin structured and disciplined forms of parish conversations. This assessment offers a particular perspective grounded in the field of organization development and systems theory and incorporating a theological view of the parish church.

Head off conflict by shaping a healthy parish

Healthy parishes keep disagreements in a range where they add to the parish's vitality—disagreements are problems to solve or opportunities to engage. There are differences and some tension, but in the end it's fruitful energy. When tensions are not maintained at this level they will almost always move to a higher level (become more serious), or the parish will develop an emotional flatness to avoid the uncomfortable feelings generated by the unaddressed tension. Following are some of the elements that contribute to keeping disagreements manageable and productive.

1. Clergy need to use their authority. But they need to use it wisely. Use it with humility, “with the head bowed down.”¹ Use it to facilitate listening and appropriate responses to that listening. Use it to nurture competence, responsibility and flexibility in the parish community.² Use it to shape a healthy sacramental life in liturgy and community.

The clergy use of authority in this parish is (circle those that apply):

Angry	Avoiding	Internally conflicted	Mostly wise in using authority	Usually wise in using authority
Humble	Facilitates listening and responding	Nurtures competence, responsibility, flexibility		Shapes healthy parish life

2. Active formation of adults. This involves shaping the parish by grounding the people of the parish in the faith and practice of the church. That is a broad and wide-ranging task; it includes helping people understand what it is to be Christians in this particular tradition and the nurturing of a community of people given to kindness, gentleness, humility, perseverance, and courage.

The degree of awareness of spiritual practices and proficiency among regular attendees (circle one)

No idea	15% of the adult average Sunday attendees are aware of the core spiritual practices and few are proficient	40% of the adult average Sunday attendees are aware of the core spiritual practices and 5% are proficient	80% of the adult average Sunday attendees are aware of the core spiritual practices and 30% are proficient
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3. Conversations & No Grumbling: two things to be held in tandem. First, there's a need for conversations that are structured and disciplined – that make use of methods we know will promote fruitful discussion and useful engagement with one another. Second, the Benedictine norm of no grumbling, no murmuring, no complaining – we need to give ourselves to making it work. The two go together. A norm of “no grumbling” will not be accepted if there are not regular and frequent ways of having needed conversations. The two need to be working in conjunction with each other.

a. We have regular and frequent structured communal conversation

Not at all					Regular and frequent
1	2	3	4	5	

b. When the rector introduces something new the overall response is usually:

Annoyance and resistance					Cooperation - people trying to make things work
1	2	3	4	5	

4. Emotional and spiritual maturity and the center. Something that inclines a parish to destructive conflict is when those of a more mature faith, and those with a stronger ability to manage their emotions, stay to the side and don't claim the emotional center of the parish's life. In some cases this creates a vacuum causing a lackluster life, a life that isn't as purposeful and healthy as it might be. It can also result in an inversion in which the most anxious, the most agitated, and the most angry and frustrated end up controlling the emotional center of the parish's life.

The spiritual and emotional center of parish is set by:

The most anxious, agitated, and angry OR those least competent in the spiritual life					Those with a high degree of self and social awareness; a strong capacity for emotional self management, <i>and</i> those generally proficient in the spiritual life.
1	2	3	4	5	

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1. From “Leading with the Head bowed down: Lessons in Leadership from the Rule of St. Benedict of Nursia” by Corne J. Bekker
2. Benedict wrote: “He should not be restless and troubled, not extreme and headstrong, not jealous and over suspicious... He should be farsighted and thoughtful... He should be prudent and moderate, extolling discretion, the mother of all virtues.”

Trust development

From In Your Holy Spirit: Shaping the Parish through Spiritual Practice

We trust parish communities that exhibit certain characteristics.

- Reliability. We see consistency and dependability
- Responsiveness. There is sensitivity and empathy, an awareness of needs and openness to take action; my feelings are validated if not shared, my ideas will be respectfully responded to with dialogue, agreement and disagreement.
- Reciprocity. There is mutual exchange; I am fed and I feed others.
- Congruence. There's a feeling of harmony and unity; this community is what it claims to be.

The model I've worked with suggests four phases in trust development. My assumption is that the above characteristics become stronger as each phase develops.

1. Inclusion & Acceptance
2. Open Information
3. Shared Direction
4. Internal Commitment, Collaboration, Self-management

A parish that has a high level of commitment, collaboration and self-management can be said to be a parish that has a high trust level. The trust becomes visible in that way.

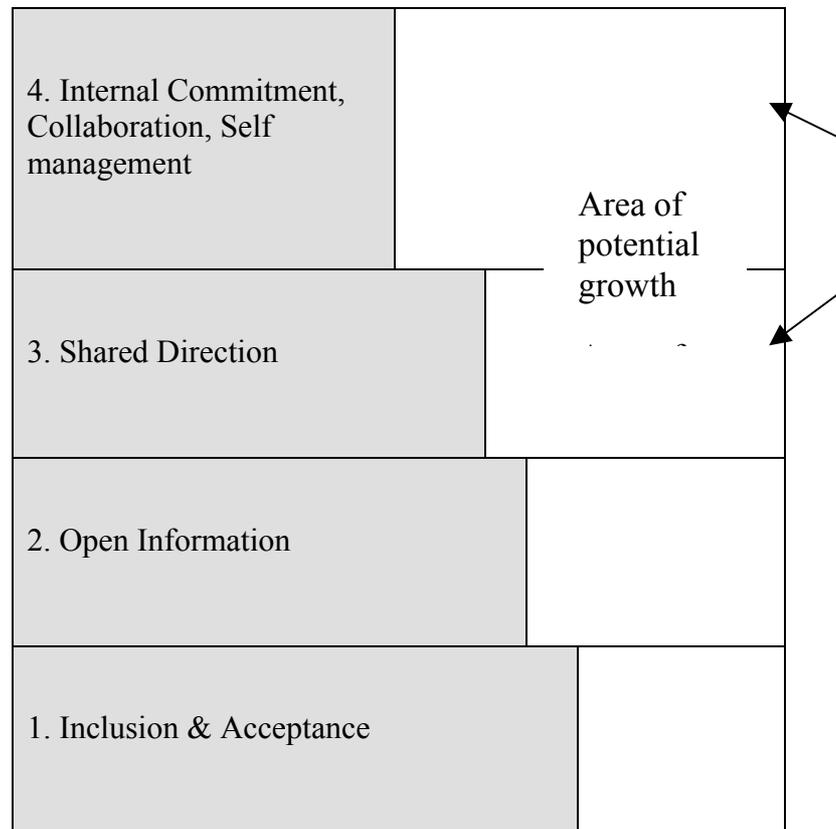
The parish always has the potential to develop and strengthen these four basic qualities of community life. These qualities "build" on each other in a sort of hierarchy, those near the bottom forming a "foundation" for the "higher" ones.

4. Internal Commitment, Collaboration, Self-management
3. Shared Direction
2. Open Information
1. Inclusion & Acceptance

For the community to become healthier and more trusting certain concerns related to each phase must be adequately resolved. Some of the concerns to be resolved as we build trust include:

4. Internal Commitment, Collaboration, Self-management	The extent to which: 1) the direction and related decisions have internal commitment, a commitment not easily changed under pressure; 2) members are open to mutual influence from one another and see themselves as mutually accountable; 3) increased authority comes from increased competence, commitment, and spiritual and emotional maturity.
3. Shared Direction	The direction of the community is shared, broadly owned. The direction is based on having explored options, is a free choice and not coming from coercion or habit, and is renegotiable if new information arises.
2. Open Information	The extent to which there is an open climate in which people feel free to share their feelings and ideas. That information is shared in a timely, useful, thorough and respectful manner.
1. Inclusion & Acceptance	How much do people in the parish community accept that others in the community belong and bring something to contribute? To what extent do people accept the parish's ways of being and doing, its espoused values and deeper underlying assumptions about God, humanity and the church, e.g., the culture?

As the concerns toward the base begin to be resolved, a foundation is built for resolving the concerns of the next phase. We can picture this as building blocks.

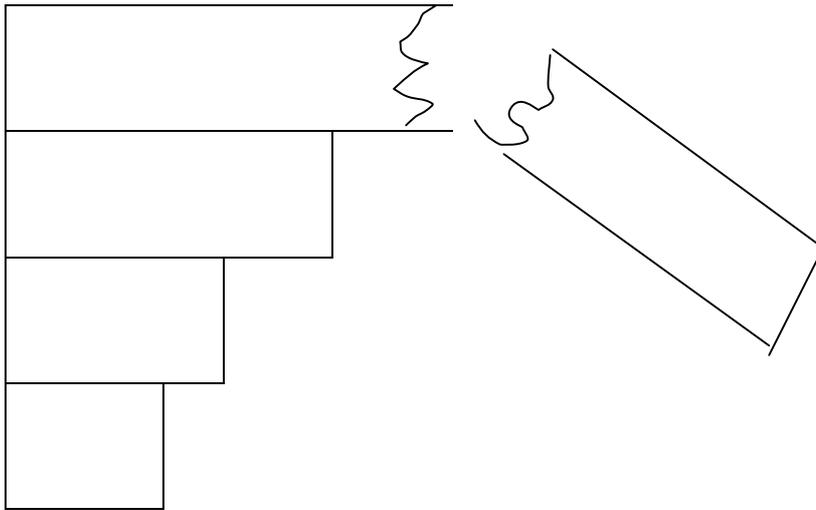


To the extent the inclusion and acceptance concerns have been resolved, members will feel free to be more open in sharing their feelings and thoughts about the community's life and work.

To the extent the community is sharing useful information it will have the base it needs for setting direction and making decisions. This open flow of information will generate the options about the direction and way of life for the community.

The extent to which members experience a sense of choice in exploring these options will determine the degree of internal commitment they have toward the direction and culture of the parish community.

When the community neglects the need for adequate resolution of “prior” concerns before taking on later concerns, an unstable relationship is the likely result. The blocks are likely to topple over! This is why things fall apart when leaders try to produce commitment and collaborative action by pressure, and insisting that we need 100% commitment from everyone.



In most parishes, indeed most organizations of any kind, trust is an afterthought. We take note when it’s missing. The blocks have tumbled over because we didn’t pay attention to building the foundation. The idea that trust is something we can intentionally and successfully create is a new and foreign idea for many people.

Based on “Trust Development in Organizations,” Robert Gallagher, 1995.

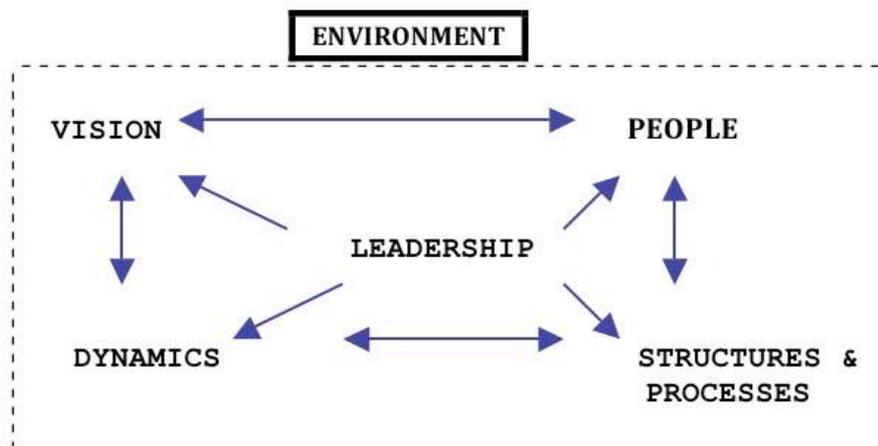
Organizational Diagnosis: Six Primary Elements of the System

A. VISION

1. The vision, goals, primary task, core values
2. How widely and deeply "owned"

B. PEOPLE

1. Competence and commitment for the job and teamwork
2. Personality Type
3. Satisfaction with the job and the organization



C. DYNAMICS

1. Managing change & stability
2. Trust
3. Climate

D. STRUCTURES & PROCESSES

1. Adequate and appropriate resources for the task, e.g., technology, architecture, & space, etc.
2. Processes for effective information flow, problem solving, planning, conflict
3. Teams to carry out needed tasks
4. Effective linkages and cooperation between subsystems

E. LEADERSHIP

1. Ability to think and manage strategically
2. Ability to stay in touch with the system
3. Ability to set direction and enable movement

F. ENVIRONMENT

Forces and trends external to the organization that impact the organization, e.g., social, political, economic

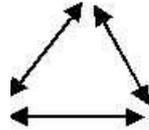
"FIT" – Not a system element in itself but the core issue to look at in relationship to the elements. To what extent do they fit together? The task is to identify areas of strong and poor alignment in the system.

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The Benedictine Promise: Overview

The three elements of the Benedictine Promise, and the whole of Benedictine spirituality, can help us see some of the hidden dynamics of parish life.

CONVERSION OF LIFE As a parish we find God on our journey together and in the new places we will go as a parish; in losing life to find life; in our openness to transformation.



OBEDIENCE As a parish we find God as we listen deeply to the world; to Scriptures; to the church, now and through the ages; to each other; to the creation; and to the deepest longings and prayer of our heart.

STABILITY As a parish we find God here and now in the relationships and pattern of our life together.

Benedictine spirituality is part of our Anglican DNA. It's the way of the Prayer Book and is embedded in much of the way we function as parish communities. We can make use of it in the work of congregational development: 1) as a way to see and enter into the depth of our own culture as Episcopalians and 2) because it is the spirituality of particular communities that have developed a capacity, over time, to maintain their integrity while renewing themselves in adaptation to the environment.

Look at the dynamics of parish life

You might think in terms of the whole parish or of a specific event or experience.

- What is the predisposition you see in the parish's behavior toward stability, change, or listening processes? Which direction do we generally tilt towards? Which is our anxiety often focused upon?
- In the parish's expression of stability, conversion of life, and obedience what seems healthy to you, what unhealthy? Is the stability simply being static? Is the conversion simply being driven by an impulse to change? Is the obedience endless listening and process or too little listening?

Develop a parish culture that is marked by:

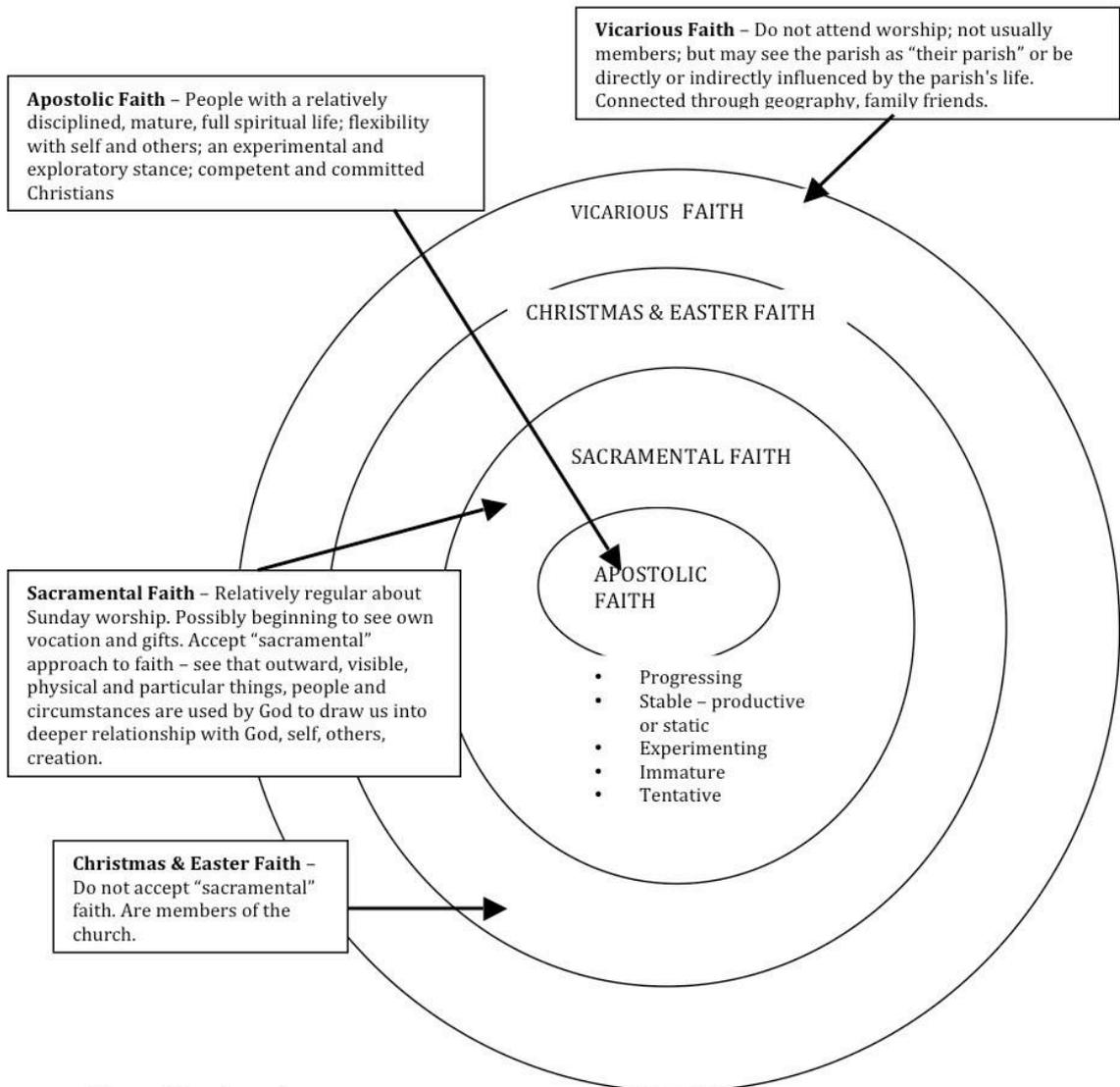
Stability – Especially seen in Liturgy, prayer and relationships.

Obedience – Seen in our openness to listen to, and respond to, one another, our bishop and the larger church.

Conversion of Life – Out of our life of stability or obedience we see and act on new challenges and opportunities for mission and building up the Body of Christ.

Copyright Robert A. Gallagher, 1987, 1997, 2002, 2003 For more on the model see Robert Gallagher's *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Ascension Press, 2008

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.

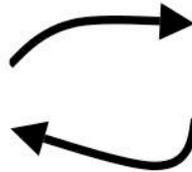
From *Fill All Things: The Spiritual Dynamics of the Parish Church*, Robert A Gallagher Copyright 2008
 "Shape of the Parish" Diagram -- Robert A. Gallagher/Mary Anne Mann, 1983; Revised RAG 1999, 2003

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

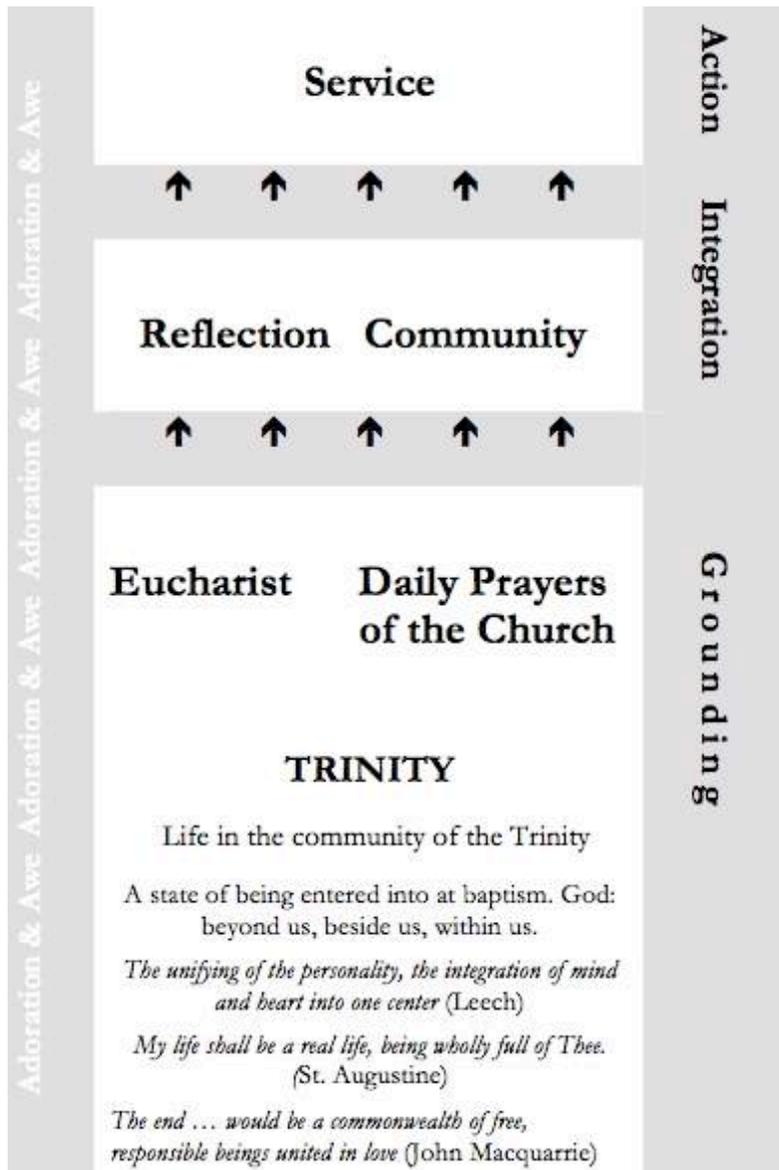
Which the parish helps by:

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.

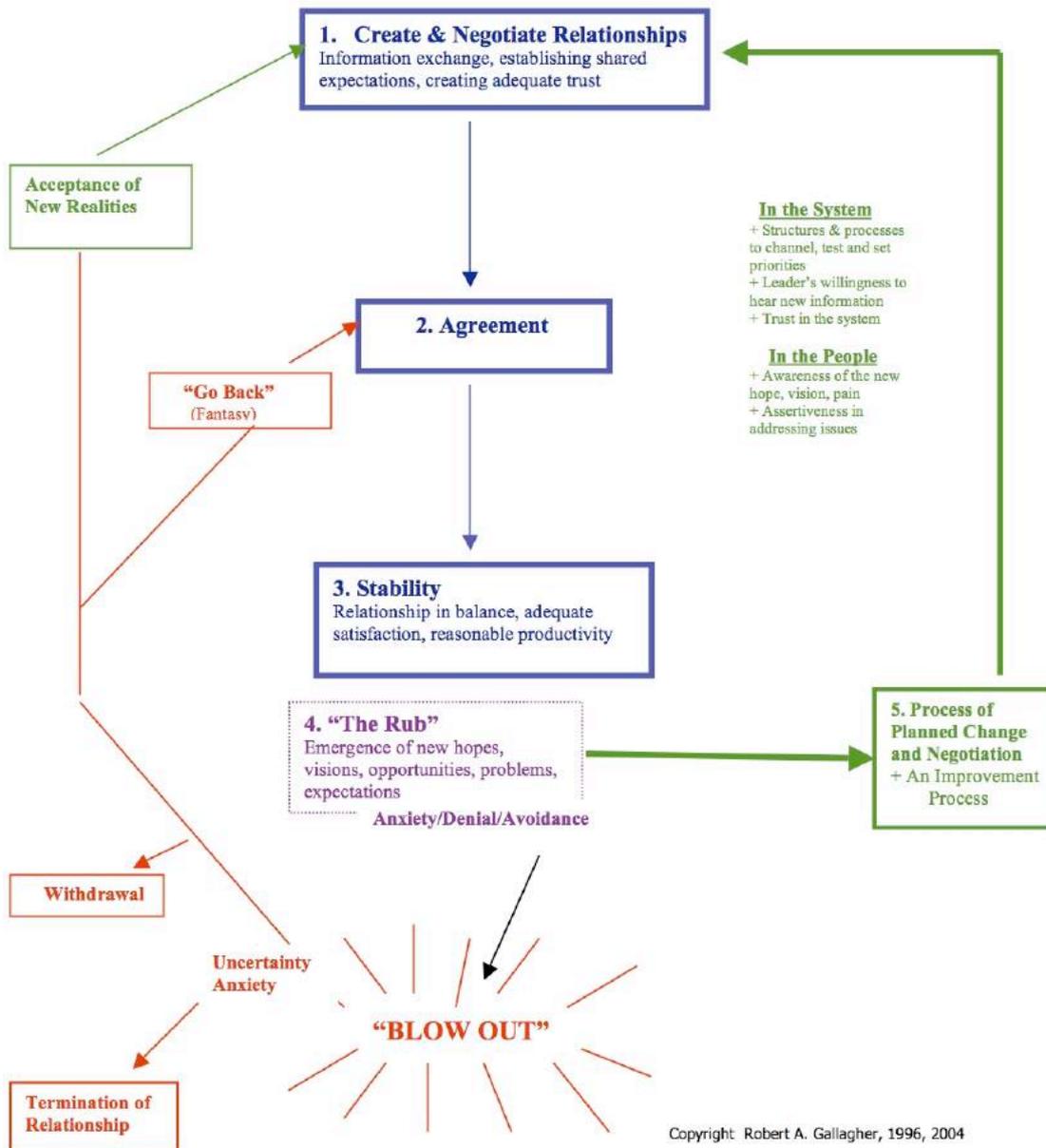
Offering programs and guidance in creating, experimenting with, and revising a spiritual discipline.

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

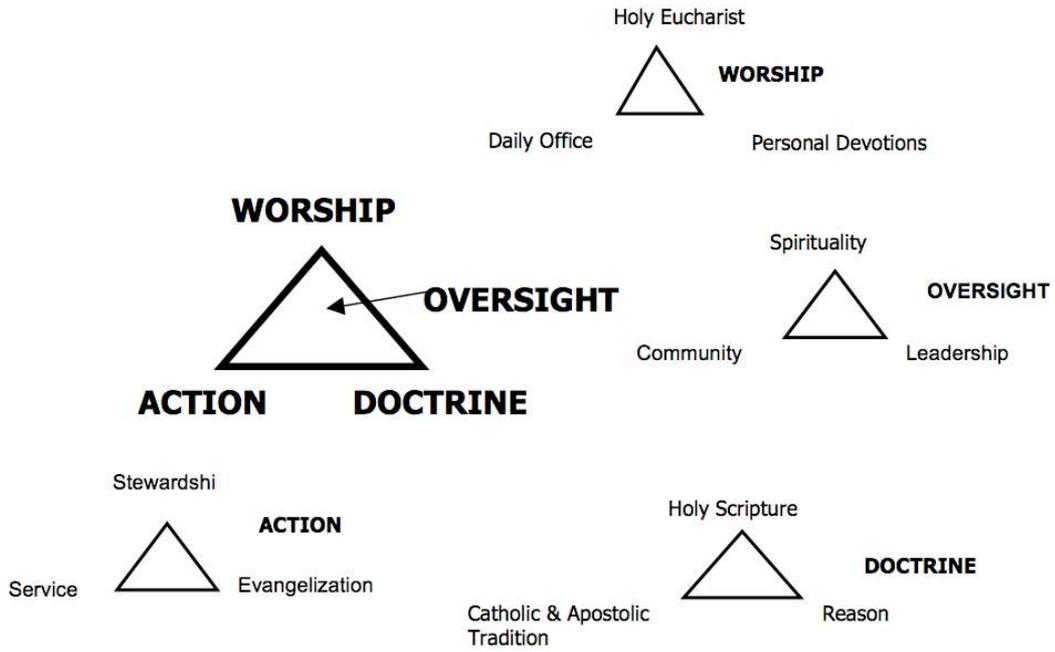


RELATIONSHIP CYCLE IN ORGANIZATIONS



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The Christian Life Model



Copyright Robert A. Gallagher, 1985, 2006 For more on the model see Robert Gallagher's *Fill All Things: The Dynamics of Spirituality in the Parish Church*, 2006 and *Power from on High: A Model for Parish Life and Development*, 1982