

CDI Trainers

Serving dioceses in a ministry of congregational development

Creation of CDI Trainers

There are 24 of us, so far, that have indicated an interest in being part of CDI Trainers. I am expecting another 5 or 6 people. This is your formal invitation to join. Please read the invitation and fill out the agreement to become a trainer/consultant with CDI Trainers.

Together we will be forming CDI Trainers -- a network of trainer/consultants in the Episcopal Church committed to developing the capacity of dioceses for congregational development.

CDI Trainers would offer

Diocesan based CDI's and a variety of services to assist dioceses with a CDI (e.g., consultations to help dioceses become more effective at facilitation congregational development; workshops to build competence in team facilitation, consultation, etc.; certificate programs in consultation skills and leadership; internet list services for CDI grads and diocesan leaders; diocesan forums in congregational development; etc.) Most of these offerings already exist, others are in the process of being developed.

Ownership

The program would belong to the trainer/consultants making up the network. If you continue to be an active member of CDI Trainers you continue to share in the program's ownership. Trainer/consultants may individually, or in teams, have a claim on the "operational ownership" (if you have a better phrase for this let me know) of programs they are actively conducting, e.g., a training team conducting a diocesan CDI or the team leading the NYC national CDI. That "operational ownership" exists only as long as they continue to actively conduct the program. If they cease to do that others in CDI Trainers may step forward to accept responsibility for the program.

The transition from my ownership to the trainer/consultants would include the following -- 1. full ownership of the program as of the second meeting of CDI Trainers (late 2000, early 2001); 2. if CDI Trainers folds or changes its primary mission all rights revert to me; 3. if I leave CDI Trainers I give up the right to conduct CDI's and anything in the name of CDI Trainers but retain the right to offer all other programs and use materials I have produced as part of my own consulting practice; 4. I would receive 10% of any licensing fees charged dioceses or other groups until 2008 (at 1999 rates this would be \$200/cycle on each CDI), 5% of the profits from the sale of participant and trainer manuals for CDI and other programs until 2008; 1% of all consultation or training fees received by members for work they receive through CDI Trainers (except for their work in conducting a diocesan based CDI). 5. I would also maintain a right to the leadership of and fees from a national CDI (in NYC and on the West Coast, if one develops), the certificate programs, and the

workshops in Consultation Skills Training and the Clinic for Active Consultants, until 2004 (my hope would be to open these up to other leadership sooner).

While CDI Trainers claims ownership of all its programs and materials, there will be a kind of “operational ownership” functioning. If you, or a team you are part of, has begun and continues to conduct a program, you have a claim on that work. These means that other trainer/consultants are not to engage in CDI Trainers related work in that field, e.g., trying to set up second CDI in a diocese, or offering a national program in addition to those already approved, or offering a workshop in a local or larger market that is essentially the same as an existing CDI offering and competes in that field. If this gets messy the annual gathering can sort it out. The point is to respect each other and work each has established. In all of this we agree that if we develop an offering that it makes sense to have others trained to offer, we will set up a training process. Those who complete the training get authorized to offer the program.

If you produce a document, design, model, etc. to be included in a CDI Trainers manual or as a handout in a program:

- mark it as follows Your Name © CDI Trainers The Date
- you have a right to use it in any setting

Operating Style

Collaborative and entrepreneurial and shared responsibility.

Collaborative in the sense that the gathered group would make all decisions about program offerings and materials, marketing of CDI Trainers, etc. related to maintaining quality and organizational integrity and integration. All trainer/consultants would agree to uphold program quality and work within guidelines. Accountable to the network for work done in the name of CDI Trainers or originating from a CDI Trainers contact.

Entrepreneurial in that each trainer/consultant would have the right on their own initiative to market and conduct CDI's and most other programs to dioceses and other groups; to work in teams with others in the network; to charge fees at a rate they establish. If a CDI Trainer program requires funds for its operation the trainer/consultants involved will be responsible to raise such funds.

Shared Responsibility in that to remain part of the network a trainer/consultant must attend every network gathering (about every 12 – 16 months for 2 – 3 days); accept responsibility for some of the network's activities (e.g., a coordinating committee, web page, financial, the yearly gathering, monitoring contracts and quality service, trainer/consultant certification, etc.); and conduct CDI Trainer programs in a professional, collaborative, manner that meets CDI Trainer standards. I'll appoint the initial teams. Members will not receive fees for work related to the yearly gathering or shared leadership teams. We share responsibility for any organizational expenses.

Yearly Gathering of CDI Trainers

Gatherings are for the purpose of :

1. Maintaining quality service and programs
2. Community Building
3. Approving new initiatives, e.g., new workshops, programs, materials, etc. that will be related to CDI Trainers
4. Forming and maintaining Shared Leadership Teams and other governance issues

All gatherings will focus on the two purposes. A normal schedule will allow no more than 25% of working time to the other purposes. Decisions will be made by a 60% majority vote of those present.

Oversight and Shared Leadership

There will be a difference between program teams (e.g., the team conducting the CDI in WNY or a team formed to create a new program) and shared leadership teams (i.e., the team that will coordinate and broker contracts or the team that will manage external communications).

Every trainer/consultant will belong to at least one shared leadership team. See the Shared Leadership sign up sheet for more information.

Web Page and other Advertising

CDI Trainers will establish a web page this fall that will include information on programs and on each trainer/consultant. It will allow for direct links with each trainer/consultant as well as providing contact people that dioceses and others can consult with about the use of CDI Trainers. There will be advertising in national church publications to point people to the web page.

The web page will probably include: Home page, "How we can serve your diocese", "About CDI Trainers" (who we are, history, etc.), information on national CDI's (including registration information), information of diocesan CDI's, information on CDI with ways of contacting people that could help a diocese get started, other programs we offer, information on each trainer/consultant, connection to list serves (for trainer/consultants of CDI Trainers, for anyone in a CDI or any graduate).

All trainer/consultants agree to use the organization's list serves by:

1. On the list serve for trainer/consultants – staying connected about programs and the activities of the Shared Leadership Teams; offering and attending to information.
2. On the list serve for CDI participants and grads – occasionally initiating a topic for discussion, responding to topics, etc.

In all cases observing norms of civility in the use of the list serves.

Financial: Cost/Benefit and Arrangements

Every one that joins CDI Trainers will provide an initial \$500.00 for the network to use for the web page, advertising and other expenses. This fee will be payable by November 15, 1999. See the agreement for more information

The cost of yearly gatherings will covered by each trainer/consultant. There will be a common travel pool (we will average out costs so that each person pays the same for travel). Once you are a CDI Trainers - trainer/consultant, you will be able to offer CDI Trainers programs and be listed as a trainer/consultant on the web page.

CDI Trainers will receive the yearly licensing fees from diocesan CDI's, other programs and materials, pay out any fees due trainer/consultants serving as mentors and to me; And use the remainder for maintaining the web site and related list serves, PR, and administrative expenses. Licensing fees from dioceses on a personal contract with me will not begin until the end of Cycle Two of that contract.

Each CDI and other program is the financial responsibility of the diocese/institution and trainer/consultant(s) involved. All programs will be listed in the web page and in other PR as appropriate.

With CDI Trainers approval, any member or group of members, may seek grants for special work, new programs, etc. as a CDI Trainers offering.

The question of the long-term legal structure for CDI Trainers will be taken up by the group at its second gathering. Until then it will operate as a network of practitioners.

Existing Diocesan CDI's

Existing CDI's related to CDI Trainers include WMA, WNY, DC, CT, and VA. SWFL may begin one within a year. The CDI in NC is understood to be an extension of Sewanee's CDI.

National CDI's

There are two existing national CDI's (NYC and Sewanee) and a third possible (West Coast). The NYC and West Coast programs are owned by CDI Trainers; the Sewanee CDI is owned by Sewanee but will work with the other national programs and CDI Trainers to maintain program quality and consistency.

National CDI's are offered for participants from dioceses without a CDI or those that simply find the national CDI's schedule more workable. National CDI's will have space on the web site. National CDI's are the responsibility of related institution and/or training team.

Role of Sewanee CDI

Sewanee CDI came up with the name Church Development Institute. Before that the program had been called Parish Development Institute and Parish Development Course. Peggy and Dennis have agreed to the idea that we will all share the Church Development Institute name for our core program. If that had been a problem I have a trademark on CDI Trainers and Congregational Development Institute.

Sewanee CDI will continue to be in an informal partnership with the other functioning national CDI in NYC. They have agreed to do joint advertising. These two programs are "grandparented" into the system. This means that they will not pay licensing fees. It is understood that the diocesan CDI in NC is an extension of the Sewanee program. If it ceases to be in direct relationship with Sewanee it may decide to become part of the CDI Trainers system or cease offering a CDI.

At this point we are assuming that Sewanee CDI (through the Program Center) will play some special role in relationship to CDI Trainers. The details should get worked out as we go along. That role might include – providing a standard three ring binder, coffee mugs, etc.; providing copies of Participant Manuals and Trainer Manuals; It is understood that Sewanee CDI does not play any special role in the design and content of these materials. CDI Trainers will establish design and content. Sewanee CDI may take a fair percentage of profit from the sale of items and send the rest to CDI Trainers (this split needs to be worked out). There may also be a special role in the sense of using Sewanee as a "hub" for CDI Trainers, e.g., we might decide to have national gatherings at Sewanee or use it as the base for workshops.

Certified trainer/consultants

Trainer/consultants are initially authorized to work in the following categories. Initially I will assign people to categories based on information I have. As part of the sign up process you will be asked to provide

information on your training and experience. I will make a decision about what seems comparable in specific cases. A team of CDI Trainers will take over this function once we are underway.

Please note: You must have e-mail to be part of CDI Trainers. So, if you do not have it yet, please get on-line.

Certified to conduct a CDI (on their own if they want to)

Bob Gallagher, Peggy Bosmyer, Dennis Campbell, Bevan Stanley, Melissa Skelton

Certified to conduct a CDI as part of a team - with one of the others on this list or the list above

Barbara Price, Carolyn Lumbard, Helen Jacobi, Kate Harrigan, Lowell Grisham, Steve Miller, David Selzer, Susan Keppy, Eric Williams, Doug Wigner, Michael Hopkins*, David Miron*, Susan Keppy, Jim McLean, Randy Ferebee, Scott Benhase*, Kathleen McEnery

* Needs update on new material before functioning

To be certified to conduct a CDI on their own, or to continue offering it as part of a team, the above trainer/consultants need to complete all core training requirements, have significant experience in CD/OD work as a leader or consultant, and have functioned as part of a team conducting cycles one and two.

Certified as interns

Liz Tunney (WMA), Laurie Glover (WMA), Joe Krasinski (CT), June Aziz (CT)

Will be certified to conduct a CDI on their own or in a team after interning for cycles one and two, completing all core training requirements, and gaining significant experience in CD/OD work as a leader or consultant.

New Trainer/Consultants

New trainer/consultants beyond the above will come from dioceses or sponsoring groups that work in collaboration with CDI Trainers to identify people who might lead the diocesan CDI in the future (currently applies to DC, VA and SWFL). If agreeable to CDI Trainers these people will be invited to join CDI Trainers on conditions appropriate to their level of training and experience.

Core Training for Trainer/Consultants

As a participant completed a full CDI, a week each of Team Facilitation Skills, Consultation Skills Training.

Certification to offer other CDI Trainer programs

I will provide an initial listing based on the information provided in the sign up process. That could then be negotiated with the team that will take responsibility for certification.

Commitments of Trainer/Consultants

1. To developing the capacity of dioceses to engage in effective congregational development
2. To offering quality programs and consultations
3. To our own professional development as CD/OD practitioners (trainer/consultants will be expected to gain at least six weeks of training beyond the core -- at a rate of at least one week/year, at least half in organization development; also, a week of human relations/human interaction is recommended). Some being invited already meet this requirement.
4. To the standards of CDI Trainers (as seen in the participant manual description of the program and other documents)
5. To full participation in CDI Trainers
6. To support the work of other trainer/consultants

Signing Up

If you are interested in being part of CDI Trainers you need to send in all your paper work and start up contribution of \$500 by November 15. Except for those raised up in diocesan programs the group will be closed for a transition period.

If you have any suggestions for tasks that will need to be performed as we start up (that do not seem to be cover in this document), please send them to me by e-mail.

I'd be glad to respond to questions about all this. I am also willing to talk with any of you about how to apply all this to your particular situation. However, these documents will need to serve as the start up charter. It will not be possible to negotiate changes in the documents until CDI Trainers has its second gathering.