

Hand off Agreement April 21, 2010

Hand off Agreement regarding the change of ownership of CDI Trainers to the membership of the Senior Trainers of Church Development Institute and Leadership Training Institute.

1. Oversight and Development of CDI and LTI Trainers

CDI Trainers and the Coordinating team of CDI Trainers are responsible for the oversight and development of all aspects of CDI Trainers and will maintain a clear pattern of acting upon that stewardship.

- National Program of CDI is our historic heart and generator
- Diocesan CDIs are the place where we reach, teach and touch the most people
- LTI is the most powerful resource we have for the development of people as leaders and trainers
- Continuous development of a high quality trainer network
- Materials such as CDI Manual, LTI Manual, Designs, handouts

Note: The overall copyright will be with CDI Trainers however the specific pieces written by Robert A. Gallagher will remain with Robert A. Gallagher. There will also be a notation in our materials regarding the role Robert A. Gallagher as creator of these resources. Robert A. Gallagher will maintain the right to utilize all materials listed above in his own training, consulting, parish and written work.

- Protect the intellectual property and copyrighted material; protect the institutional life
 - Create ways of heading off the problem, including requiring all trainers and interns to make an agreement based on the Aug 11, 2008 message from the Coordinating Team (see below)
 - Promote all aspects – marketing and personal action – national and diocesan CDI, LTI, development of a high quality network of trainers.
 - Engaging in an assertive defense of our intellectual property. Including continued monitoring of Olympia's compliance with the agreement and strong efforts to deal with the exportation of our work into others dioceses by Olympia.

2. Coordination of CDI and LTI Trainers

There is consistent action for the continuous improvement of what we offer in teams of teaching and training.

- Meetings for Coordinating team and the CDI/LTI Trainers gathering will utilize the methods we teach. We will seek to check in with each, pay

attention to task and relationship as well as group development theory as it plays out among our times together. Our agendas will reflect the totality of CDI's life and work by continually looking into the issues of knowledge and practice.

- Record minutes and other documents
 - Financial Records are maintained by a Treasurer to be elected from the membership at CDI/LTI gathering.
- Communication includes maintenance of membership lists, CDI Trainers, inactive and the e list.
 - Public Relations promote all aspects concerning the National Program(s), Diocesan CDIs, LTI workshops and the high quality of network of trainers.
 - Website is maintained as a resource for dioceses and people interested in congregational development and a Public Relations piece.
- Trainer Development
Continue an appreciative building and integration of congregational development and organization development, of ascetical and pastoral theology with a system orientation and Anglican/Episcopal spirituality.

3. CDI/LTI Vision Development

- Cultural norms and values are discussed at CDI/LTI Gatherings
 - Integration of knowledge and skills
 - Core training and continued training requirements
 - How are we holding ourselves accountable?
- Over the past 30 years Robert Gallagher and then CDI Trainers have developed a unique offering for the church. We have learned from our experience in a disciplined manner. Among the elements of intellectual property that we have developed are
 - 1) That we maintain at all times high standards for trainers and participants.
 - 2) That the CDI program contains interdependent elements such as workshops sessions, worship, project development and reports, readings in the field, and support and critique by peers.
 - 3) It has an approach that is practical, grounded in Anglican spirituality and identity, innovative, competency oriented, and community centered. It draws on the fields of organization development and congregational development, ascetical and pastoral theology.
 - 4) Its orientation is one of valuing all size congregations, the parish as a local expression of the catholic church, development as the work of the Spirit, making use of learning from secular organizations and the importance of the diocese.

- 5) It combines the experiential and the theoretical.
 - 6) It is a substantial amount of time and commitment. We work on creating a critical mass of knowledge and skill in the participants
 - 7) CDI is also participation in a broader system of accountability and quality improvement that includes the national and diocesan CDI's along with the formal and informal exchanges among trainers.
- Strategic management to review at all gatherings and to ask how are we doing at:
 - Building the capacity and number of dioceses using
 - The National CDI Program(s) (our historic heart and generator)
 - Diocesan CDIs (the place where we reach, teach and touch the most people)
 - LTI workshops (the most powerful resource we have for the development of people as leaders and trainers)
 - The continuous development of a high quality trainer network, including
 - increasing skills and knowledge among trainers
 - identifying, training and supporting trainers with potential and 20 years of service ahead of them to lead and train others

4. A few specific actions we will take now

Coordinating Team will engage in action planning frequently over the next four years to fully implement this hand-off agreement.

Special effort will be put into the oversight responsibility of protecting the intellectual property and copyrighted material; protecting the institutional life of CDI. (as noted under #1 above)

An emphasis in the next 4 years to significantly increase skill and knowledge among trainers of 1) lab training and 2) the pastoral and ascetical theologies that are part of the root system of CDI. In addition to facilitating this among all trainers and interns we will consider methods such as Identifying 5 or 6 of the interns, members, with 20 years of service ahead of them. Inviting them into a broad process of professional development in the identified areas. Stack some of our resources in their direction. Also, consider using funds to assist trainers and interns pursue books related to this task.

5. The hand-off will be considered complete four years from this agreement being made

Robert Gallagher and his heirs have those four years to make a claim regarding CDI ownership. That claim would need to be based on a significant lack of follow through on this agreement by the CDI Coordinating Team and/or the membership.

Below is a statement from the Coordinating Team on August 11 2008. The current Coordinating Team will use it as the basis for drafting an agreement to be signed by all trainers and interns.

CDI trainers and interns

Patricia <Patricia@trinityparishde.org> Mon, Aug 11, 2008 at 10:54 AM

To: AlissabethNewton@gmail.com, anita@coef.org, blanche87@yahoo.com, beth.bordeaux@gmail.com, BevanStanley@aol.com, wabthomas@worldnet.com, bricoo@bellatlantic.net, DKR52@aol.com, dgc777@gmail.com, stpauldoug@yahoo.com, GManning@trinitywauwatosa.org, gcurry@allsaintsbirmingham.org, jmerktecc@yahoo.com, kmcenerny@lawyerscommittee.org, kcollierm@diolex.org, krista_points@yahoo.com, LGLOVER@clarkart.edu, etunney@cox.net, LBlanchard@coloradodiocese.org, melissaskelton@comcast.net, mheyne@mwrinc.com, worzalla@diomil.org, rebeccadebow@hotmail.com, fr.wood@earthlink.net, rscwood@mindspring.com, ragodct@gmail.com, scott_benhase@juno.com, stephanie.gadzik@gmail.com, StephenC@cccindy.org, bishop11@diomil.org, adamgallery@roadrunner.com, revsusburns@verizon.net, slatimer@stjohnswv.org, canon@ednin.org

Dear CDI Trainers,

As many of you know, because you were there, we had a very good meeting of all CDI trainers in Milwaukee earlier in the spring. At that meeting we articulated real clarity on the role of being a CDI trainer and the ways in which we wish to organize and equip ourselves to be successful in our various programs. The following are the seven aspects of CDI programs to which we have agreed.

1. That we maintain at all times high standards for trainers and participants.
2. That the CDI program contains interdependent elements such as workshops sessions, worship, project development and reports, readings in the field, and support and critique by peers.
3. It has an approach that is practical, grounded in Anglican spirituality and identity, innovative, competency oriented, and community centered
4. Its orientation is one of valuing all size congregations, the parish as a local expression of the catholic church, development as the work of the Spirit, making use of learning from secular organizations and the importance of the diocese.
5. It combines the experimental and the theoretical.
6. It is a substantial amount of time and commitment. We work on creating a critical mass of knowledge and skill in the participants
7. CDI is also participation in a broader system of accountability and quality improvement that includes the national and diocesan CDI's along with the formal

and informal exchanges among trainers.

In addition to the discussion about the nature of the program we also discussed our work and participation in other programs in the same field. It is our assumption that member of CDI trainers and interns will not work for any program that is a direct competitor with CDI. That you will not in essence take what you have learned from being a part of CDI and use it to make a competing program succeed; that you will not take either the intellectual property or the copyrighted material of CDI and use it to develop or assist a competing program. While there is not any formal contract involved it is a common norm in many sectors that if you leave an organization you do not work for the direct competition in the following year. We see this as a matter of professional ethics whether there are formal contracts involved or not.

How are you to be clear about what is a competing program? We suggest that one measure is its roots. If the originators and developmental history come out of the CDI – then it is likely that it is a competing program. The second measure might be to look at the training strategy, approach and orientation of the program in comparison to CDI. If it is much the same – then it is a competing program. Another measure might be how substantial is it? If it is just a two-day workshop then that is different from a two-year program.

We are committed being of support to you. If you find yourself in a particular situation where you have questions about how to sort all of this out. Please do not hesitate to explore your questions with a couple of us. Part of our job as the coordinating team is to assist you in your work with CDI. If we need to check in with one another to offer you our perspectives we will do that and get back with you.

Members of your coordinating team

Patricia Downing

Dickie Downing

Peggy Worzalla