Shaping the Parish: Action-Learning Process
First document

This document is part of the internal learning process for those of us involved with *Shaping the Parish*. This is our own action-learning or action research process; an aspect of how we seek to improve what we are doing.

We're inviting others to participate. Participants in the program, practitioners and participants in other congregational development efforts, may all have something to offer. Please share your questions, things you wonder, and your own hunches. Send that to Michelle Heyne and Robert Gallagher

In the program itself we are seeking to provide a process in which people will engage in disciplined reflection on the experience they are having, learn from it, and in the process become more effective at moving their parishes toward health.

That process applies not only to the participants but to the training/coaching staff. That's what we are doing here. It applies to small things as well as major understandings about process, goals, and structure.

For example we're not sure that we should be describing ourselves as trainers. A more accurate description of the role might be coach/trainer or trainer/coach. Another example is around our clarity about how this program differs from, say, CDI. While the program contains significant training and educational elements, it's primarily a support structure. That has become clearer over time.

For those unfamiliar with the program, background is provided in an endnote.[1]

Most of what we are identifying in this document can't be adequately assessed until after a parish has been through the program and has fully engaged the program outcomes and elements.

Hoped for Overall Outcomes of Shaping the Parish

Your thoughts, wonderments, hunches on overall outcomes. Are these the right measures? Are these the things we need to be measuring? What are we missing that the program addresses in practice? What is not part of the program that needs to be part of the program?

Our hope is to help parishes jump-start into a new way of health in a process that would:
1) have short term beneficial results for the parish while also
2) beginning it on a long-term pathway for transformation: a more vibrant parish, more deeply grounded in spiritual life that supports the primary task of a parish;

3) along the way increase the competency of parish leaders for emotional and spiritual life and in change theory and methods.

That around 6 months after the end of the program participants would be able to report movement in all three areas.

Some specifics:

1. Significantly increase ability to design and implement strategic developmental initiatives in the parish.

This would include an improved ability:

- To accurately assess which initiatives (interventions) are likely to be effective, at this time, in this particular parish.
- To understand and use intervention considerations in assessing the fit between a possible intervention and the parish
- To effectively implement initiatives
- To shift the parish demand system so more attention is given to truly strategic matters
- To become more strategic, at both a participant and parish level, by actually engaging in and reflecting on strategic development initiatives.

2. Participants improved their ability to understand Social &Emotional Intelligence and use that for their own growth

- Know E&SI categories (as seen in MBTI, FIRO-B and *Primal Leadership* – Self Awareness, Social Awareness, Self Management, and Relationship Management)
- Can self-assess in relationship to the categories (either FIRO B and MBTI or categories in *Primal Leadership*)
- Have made progress on their own goals for S&EI growth

3. Parish and Social & Emotional Intelligence

- Can assess parish in relationship to S&EI (overall culture, leadership)
- Parish has made progress

4. Increased ability to learn from disciplined reflection on experience

- Understand the idea of Action Research or action learning
- Can effectively give and receive feedback
- Can use EIAG (process for learning from experience)
- There's an increased understanding of the often hidden and covert dynamics within their parishes

5. Personal Spiritual Practice

- Know how to self assess their own spiritual practice using a spiritual practices map (*In Your Holy Spirit*, M. Thornton, other)
- Have increased proficiency in a couple of areas of spiritual practice

- Have increased their understanding of their own cycle of renewal – apostolate (their own oscillation process)
- Have improved how they manage their own cycle of renewal – apostolate (their own oscillation process). Possibly by having a more intentional Rule of Life.

6. Parish and Spiritual Practice
- Parish leaders (clergy and a development team connected to the program; possibly others) understand oscillation theories, critical mass models, and spiritual maps in relation to the parish
- Parish leaders (clergy and a development team connected to the program) are able to use the above models and theories to assess, educate, and coach.
- There is an improvement in parish structures, processes, and a climate that nurtures Apostolic Faith. This can be seen in things such as: the Sunday Eucharist, programming, engagement by the clergy with those of Apostolic Faith and those progressing toward it.
- Depending on where the parish started: there is an increase in those of Apostolic Faith, there is a more vibrant dynamic existing in relationship to Apostolic Faith, there is a stranger climate and behavior pattern of both acceptance and challenge (or invitation to grow).

[Note: We are aware of many other possible elements or measures. This is based on things we have already seen in the program. For example:
-How we might look at parish improvement. Larger stronger parishes moving from a "static" position to a "developing" position would be a sign of success. In more individual terms—a priest stuck in one limited approach to leadership broadening that approach and showing more flexibility in leadership style. If this is a more fragile parish with attendance and pledging problems, we might see either improvement in numbers beginning with simply stabilizing a decline, or finding a congregational option, a structure, that is a better fit for the current situation (cluster, merger, yoke, etc.)

Assumptions about the needed program elements

Your thoughts, wonderments, and hunches on the assumptions about program elements.

The program assumes that we can help the parish jumpstart itself into a better place as a combination of elements coming into play over a 16 month (+) period:

1. At least six strategic developmental initiatives that come from a list provided by the program. In that process, both taking concrete action that increases parish

health and at the same time engaging personal learning as the developmental initiatives are planned and implemented.
2. A support - accountability system that includes frequent exchange with participants and training-coaching staff
3. A stance of learning-from-experience. When you try to change something, looking at what happens. Participants need to adopt this stance for learning to take place.
4. A stance of collaborative engagement in regard to the coaching and mentoring elements of the program. Participants need to both accept responsibility for their own learning process and also accept that the training staff knows more about the process of moving parishes into increased health. A productive dependency vs. counter-dependency or an unproductive dependency.
5. Workshops and readings to put the participant in touch with the resources and tradition of spiritual practices, emotional intelligence, and change theory and methods.
6. The participants engaging their own growth through focused work on emotional intelligence and spiritual practices

Our Questions, Assumptions, Observations and Wonderments

Please offer your thoughts, wonderments and hunches.

1. "Weight?"
Is it the right amount of "weight?" Will the length of time and combination of elements produce enough momentum, enough critical mass of skill and knowledge, and enough energy, to produce the hoped for results?

2. Right elements?
Are they the right elements? Is this the correct combination of elements? We need clarity on which structures, processes and climate most contribute to producing the outcomes we seek.

3. Staff time & Energy
Can the staff sustain the needed energy and time commitment? This is much more demanding for the trainers/coaches then CDI was, and CDI is more demanding than any diocesan program we've looked at. Trainer-coaches need to invest both a significant amount of time and energy on an ongoing basis. There is a good bit of work between workshop sessions. They are also required to live what they teach. For example by giving attention to their own emotional maturity and spiritual practice; having the daily practice of the Office and workable form of reflection. The outcomes of the program need to show in their own lives, work, and parishes.

4. Helping the participants adequately engage the work
How can we best help the participants adequately engage the work? How can we help most participants arrange their personal "demand system" so they can focus on

this work? What's expected of participants requires a steep learning curve. There are many new things to absorb and engage in a short period of time.

5. Orient participants
How can we best orient participants (initially and ongoing) so they can take the stance needed if they are to effectively use the program?

> We are setting this up so participants have to cross a line that includes
> -I want this program
> -I'm willing to change how I see and do things
> -I'm willing to invest myself and work really hard
> -I'm open to coaching and guidance
>
> The Human Interaction lab at the front end is another part of that line. Our hope is that it begins to orient participants to learning from experience and several core EI skills.

6. Amount of workshop time
Is providing less workshop time (than in our CDI work) for learning change theory and methods going to provide enough?

7*. Support group element*
On the support group element involved in doing congregational development. Two assumptions: First, we think this is probably more important for clergy, especially rectors or vicars of parishes, than for others. Second we're not sure that it would be useful to have it within the Shaping the Parish program itself. That might just add more pressure on those clergy. Too much would be working around that one program. Our impression is that in the Diocese of Washington most of the clergy are already part of one or two effective support groups. These groups are likely to include people with training from CDI or Shaping the Parish but are broader in make up. Our hunch is that it works better that way.

That doesn't seem to be the case in the national program. In that case the clergy seem to be lacking adequate support back home. Diocesan programs that do exist appear to be poorly thought through and are experienced as more distraction than help.

8. Trainer-coaches?
We have describing ourselves as trainers. That's accurate for CDI and lab training programs. Might a more accurate description of the role in Shaping the Parish be might be coach/trainer or trainer/coach. Or words like mentor or consultant. This isn't simply about "words" but self-understanding regarding the role and work as well as participant expectations.

9. A support structure
Our clarity continues to grow about how this program differs from say CDI. While the program contains significant training and educational elements. It is primarily a support structure. That has become clearer over time.

10. Transferable to diocese
What is needed for this to be transferable to others to carry on in the diocese?

11. Knowledge about change theory & methods and developmental initiatives
Our assumption is that most participants don't really know much about change theory and methods, though they often think they do. Most tend to have a few ideas picked up about things like appreciative inquiry or self differentiated leadership. It's rare if they have much sense of the methods to go along with these theories/processes. The theoretical base is usually too thin and too small to be useful.

The work on intervention considerations is an attempt to address this. We have already seen how the engagement of the intervention considerations has the impact we're seeking. The people that read and digest the theory, and work it, seem to make the needed connections and the parish seems to benefit.

The failure to grasp key aspects of change theory and methods appears to be related to where participants have made mistakes over the years. They don't know about or take into account the intervention considerations.

Our approach has been that engagement will take place over time. That they would improve their work on initiatives so that initiatives three and four would show more skill than seen in initiatives one and two.

Actions we have taken that seem to help are:
-In our comments on reports to provide the connections by noting resources, pointing to material in “Intervention Considerations” and asking questions.
-In the few cases where a participant avoided using the report format and in so doing failed to engage the considerations, we’ve asked that they redo the work. In most cases, the participant has followed through and responded with an affirmation about how this did help them see things they had missed.

12. Self direction
Some participants are very self-directed, not only reading what's on the required list but asking for more; not only doing the minimum DIs but more, not only staying in contact when reporting but frequently with questions and requests for additional resourcing and coaching. A few seem to be in a cynical and victimized place. Either not staying connected or doing it in a negative fashion.

Seems like a bell curve. Most stay in touch, when they get behind are in contact

about it, when asked to redo parts of a report not only do it but come back with reflections about how useful that was to do.

13. Demand system
We assume that the demand system needs to shift in the direction of focusing on the primary task and strategic work related to the primary task. As the parish begins to create structures and processes around the development initiatives the demand system will change.

14. Learning from experience, our own and others in OD and CD
We have reasonable evidence that some approaches work in most parishes--so we want to use them. The material offered in workshop sessions and the developmental initiatives are part of that. This is the culmination of years of work, our own and others. It comes out of the action-research or action-learning process of some successes along with some mistakes. Lessons learned and taken to heart.

15. Doing emotional intelligence work
There are several other programs that talk about emotional intelligence spiritual practices and change theory and methods. Reading about these things, thinking about these things, and talking about these things, is not the same thing as doing them.

Shaping the Parish has as a primary component *doing these things* and then to spending time reflecting on them and drawing learnings. And then doing it again.

16. Initial T-group experience
We are assuming that the initial T group experience will begin to orient the participant toward the process of learning from experience and provide a few basic skills needed for that process and other emotional intelligence work.

We also assume that this will be deepened by two other components. 1) Workshop time in which experiential exercises are part of what we do. 2) And the implementation of developmental initiatives that then are reflected upon and learnings drawn.

17. Self management
Program leaders have to manage their own emotional reactivity when they hear comments and analysis from participants that show a failure to grasp something critical about what is being done in the program or the parish. We can get hit with our own defensiveness or sense of simply being overwhelmed by many things in life, to deal with at the moment or as an annoyance at the relative ignorance of what a participant may be saying.

It's essential that we maintain our own equilibrium in order to be useful to the participant. The participant has not created our life in which there is too much to do.

Our defensiveness and emotions are our own.

It many be that resistance and counter dependence is somewhat harder to manage in this program then say in CDI because there's more regular contact in the work in between sessions. More shared responsibility. The developmental initiatives are ones that we created. In most training programs you meet people at regular intervals, there may be resistance or issues raised during the workshop session, but then usually there's nothing between the sessions

Participants run into exactly the same issues in the parish. People with considerably less skill and knowledge, and certainly without the responsibility, take them on and push against needed changes.

So the participants also can have issues about how to manage their own emotional reaction. Some do well while others give way to their frustration or anger. Some go into a conflict avoidance stance by saying that it doesn't matter. They may push against the program by objecting to the requirements of the program, or simply deciding that some things don't matter. Who cares if parishioners grow in Christ? And where do these models come from? Maybe they're wrong?

Some participants have a difficult time sorting out that their own feelings discomfort from judgments about the program.

18. Being strategic
The CDI experience showed that few participants knew how to design truly strategic projects. They would come up with activities that were useful in a limited sense but that would not have a long-term impact, have a ripple effect, or really serve the primary task. Frequently the projects developed would continue a pattern of little transformational impact. The parish would be active and busy but not really going anyplace new.

Our hope is that by working with developmental initiatives that are strategic in nature they will have a quicker impact on the parish and over time develop a sense of what is strategic thinking and work.

19. Mindset about educational programs
Possibly all participants to some extent, and a few in a significant way, approach the program as though it were a college course. Do the minimal work, the teachers are grading you, and it's all about my education so missing sessions doesn't impact others. We can sit there, enjoy it (or not), return to the parish, and do nothing new.

That has undercut the overall investment and morale of other participants, creating a lot of mostly uncompensated work for trainers or interns, and meant that parishes were not getting the attention they should have.

It's very difficult to break out of that model. Learning agreements seem to help most but not all. A few participants act as though making an agreement doesn't involve their honor; that there is a need to follow through or renegotiate or drop from the program, if you discover this isn't what you want.

Having assigned make-up work also seems to help.

Our hope is that this will improve as:

1) Participants spend more time in the program
2) They are confronted about the impact of their behavior
3) We provide a pre-registration orientation conversation
4) Clear presentation of the program being primarily a support system for parish revitalization, not just another educational opportunity.

20. Participants (all people) have difficulty with "Losing life to find life." We often assume that if we are uncomfortable or challenged there is something wrong with the program or leadership (of course, that could be). What we see in programs like CDI and Shaping the Parish is that some chronically focus on changing something other than themselves—*People don't resist change. They resist being changed!* (Peter Senge). Participants face the same dynamic as they seek ways to change the parish.

How can the program help participants adequately address this over time?

21. Other

- Most of us want to be liked or at least we would like not to have a lot of hassle in life.
- There will be a percentage of every congregation who will object to, resist, and be annoyed with people who try to bring some form of change. Some clergy have survived for long periods by doing nothing that stretches the congregation.
- Participants who may be especially conflict avoidant may, without even being aware of it, step aside from any attempt to bring change.
- Blaming external forces is another way in which parishes, parishioners, and program participants avoid their own emotional work.
- It is difficult for participants and trainers to stay in a learning position learning stance.
- How to help participants use experiential methods in the parish
- You can't make progress in your work if you're constantly shifting your approach. It consumes energy and time.
- Must be tough for some to be in a program designed by two INFPs.

[1] *Background – See www.shapingtheparish.com*
Shaping the Parish is a new approach to congregational development. It is a support system for parishes seeking to jump themselves into a better place. It brings together program elements we think may help the parish take a significant step toward its increased health and effectiveness.

First let's look at what are the various approaches out there. In broad terms they look like this.

1. The most widely used, and we think successful to date, has been CDI (Church Development Institute). This is a leadership-training program with these elements: workshop session (usually 8 weekends over two years, or two weeks for each of two summers); readings; 2 or 3 projects to design, implement and learn from. The program has a culture that is rooted in an Anglican ethos and spirituality and open to emerging theory and methods form organization development and other fields. The program is a highly integrated mix of organization development, pastoral theology, and ascetical theology.

There are currently nine or ten dioceses using this approach in one form or another. There are another ten dioceses that have conducted CDI's over the past 12 years. Of the current dioceses doing this kind of program several are CDIs proper while others are spinoff programs. Some of the spinoffs don't offer the full array of elements and may end up not having as much impact as the standard program. From 1985 until 2010 there had been a summer national CDI that attracted participants from dioceses not doing their own program.

2. There are inspirational programs. These seem to be largely long on rhetoric and current jargon but short on actual support for the work to be done. What a number of people have told us is that the dioceses gets excited about the inspirational message but then does little or nothing to turn it into action; that they hear from speakers such as Brian McLaren, Phyllis Tickle, and Diana Butler Bass and then nothing substantial happens to follow through.

It is certainly useful to be reinforced by inspirational messages. It is helpful to be reminded of why we do what we do.

But the fact is most of our clergy and lay leaders already have a deep commitment to doing the work they've set up to do. Where they faced difficulty is in areas such as change theory and methods, emotional intelligence, and spiritual practices.

3. There are peer support group type programs. What they have in their favor is that the peer support group element is something lacking in the other programs including CDI and Shaping the Parish. Some of these programs may have resources added as part of what they do but the main process is emotional support.