

# CONGREGATIONAL DEVELOPMENT MANUAL

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*A Participant's Manual for Use in the Church Development Institute*



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## Both Cycles

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Learning Agreement	5
Advance thinking about your project	6

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## Handouts Cycle One

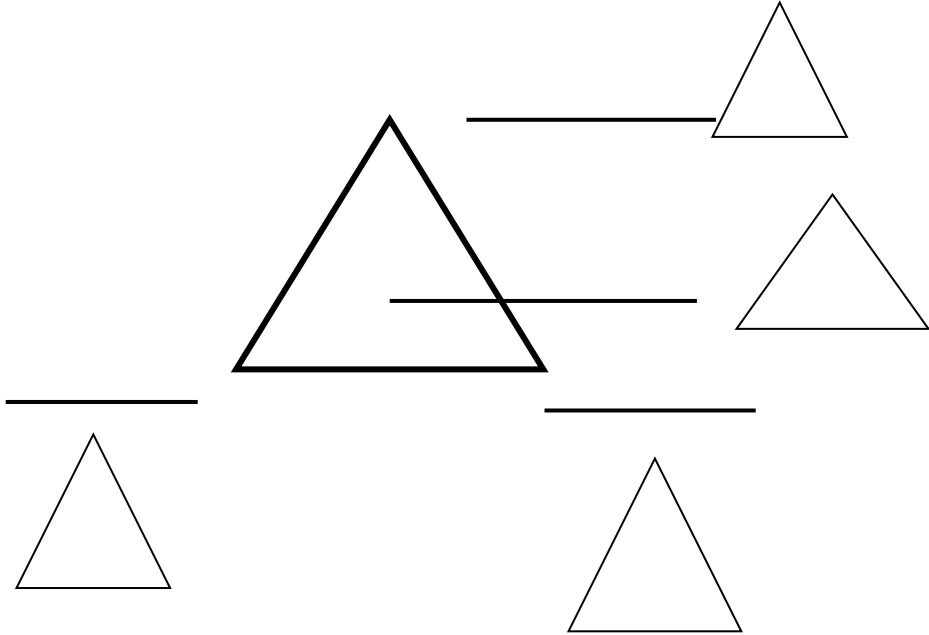
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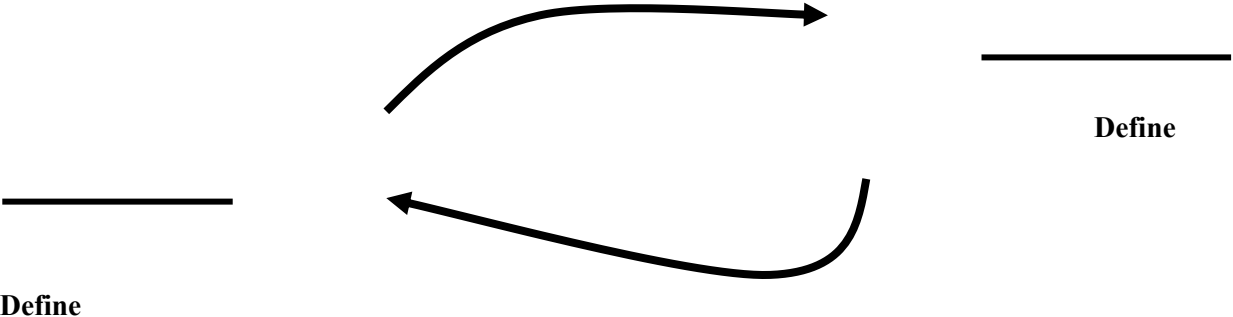
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# First Weekend Exam – Both Cycles

1. The Christian Life Model (5 points, one /triangle. Extra point for getting all)  
Fill in the 16 elements of the model

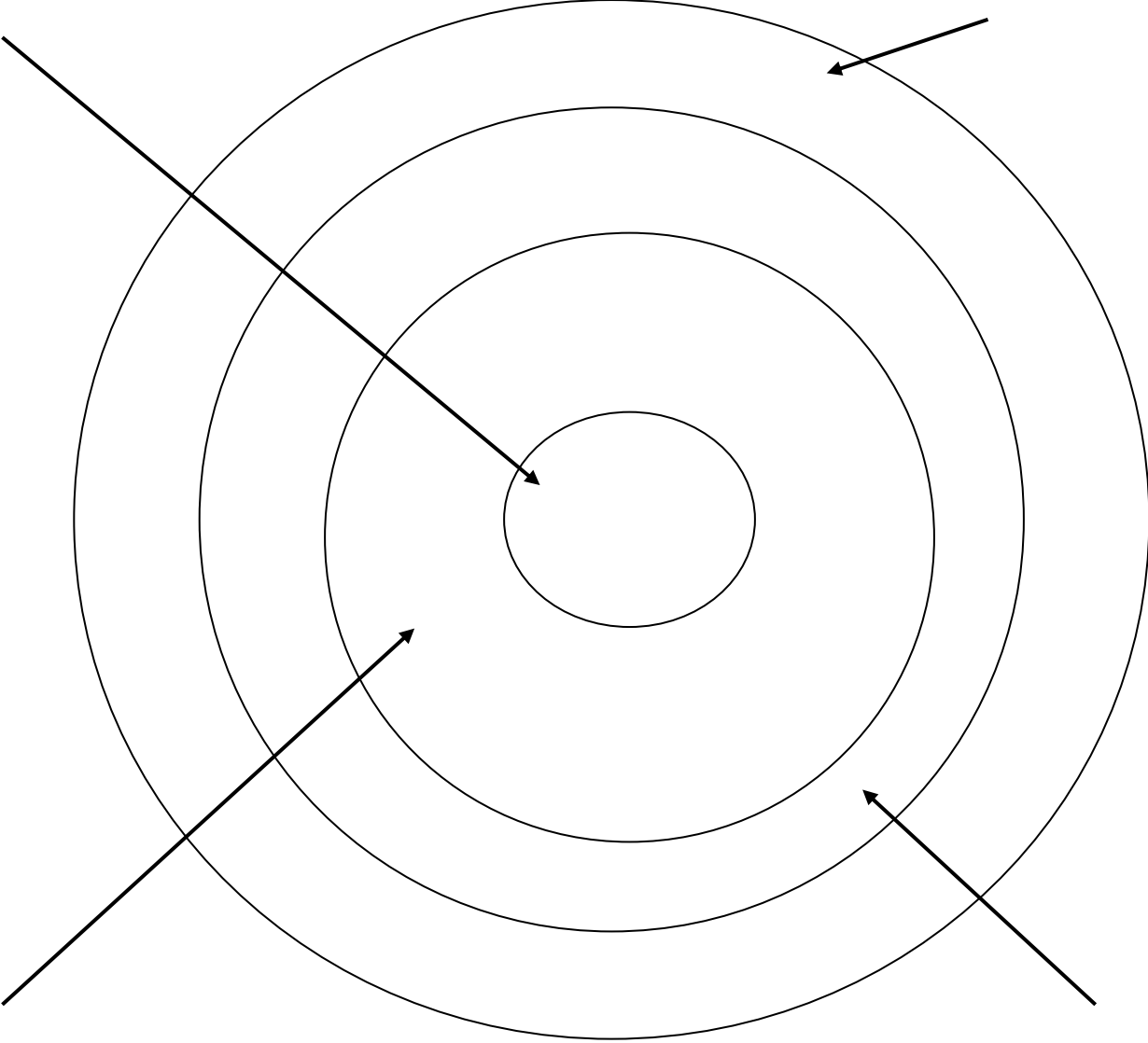


2. The Renewal - Apostolate Cycle (4 points)  
Fill in the primary elements of the model and describe each.



3. The Shape of the Parish (8 points)

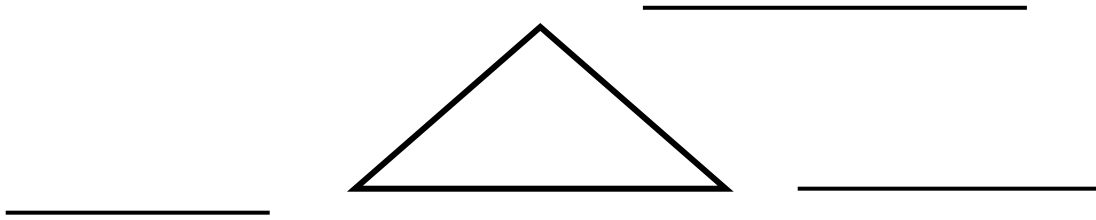
Fill in the primary elements of the model and state a characteristic of each.





4. Benedictine Promise (6 points)

Fill in the primary elements of the model and give an example of each.



Passing – 16 out of possible 23

# A LEARNING AGREEMENT

The Church Development Institute

**CDI agrees** to provide the Church Development Institute program as described on the web site and in this manual.

Our educational method includes:

1. Linking theory and practice. We make use of experiential education methods. Participants are helped to learn from their experience in working groups and as congregational development practitioners. We engage in disciplined reflection on our experience and relate that to theory and research.
2. Active adult participation of all involved
3. CDI trainers serving as managers, coaches, facilitators, and presenters in the learning process
4. Shared responsibility for the learning process
5. Feedback as part of the learning process, including critique of the Congregational Development Project Reports by other participants and trainers, assessments of the program, and feedback on participant and leadership skills.
6. Creating a learning community of congregational development practitioners
7. Maintaining CDI standards
8. A focus on organizational and system issues. Intra-personal, interpersonal, group, and spiritual life issues are important elements in effective congregational development, and are included in the program. For participants with less skill in those areas, and for anyone considering becoming a consultant – what we do in CDI does not provide enough work in those areas. Participants may want to consider additional work.
9. Participants are asked to try to use the knowledge and skills provided, "as given". This is to give ideas and methods that may be new to the participant a "fair chance" before evaluating and modifying them when back home.
10. Participants are asked to "resource" themselves as needed with mentors, spiritual direction, and/or therapy.

**The participant agrees:**

1. I have looked at the program description on the web site.
2. I am willing to fully cooperate with the learning approach offered by CDI
3. The program appears to address my current learning objectives.
4. I will make the program a priority for my continuing education.
5. I am making a commitment to fully participate in the program, including participating in all sessions (about 110 hours), the community's worship and social life, completing the required readings, participating in a "back-home" Learning-Application Team, engaging in designing and implementing congregational development projects, and completing required Congregational Development Project Reports.
6. If I miss sessions for any reason including family emergencies or illness. I will make up the sessions in a manner approved by the program leaders. I understand that if too many sessions are missed I may need to drop from the program (and begin over again.)
7. I will work in a collaborative manner with other leaders in my organization as I apply what I am learning in CDI.

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

This is to be turned in on the first day of the program.

## Advance thinking about your project

### **1. Identify some significant improvement in parish life that you would like to see. It needs to be something that needs to be done for the overall development of parish health.**

For example – Some participants would like to see a more balanced or rooted corporate spiritual life in the parish. Obvious ways of doing that are to increase use of the Daily Office and/or improve the competence of members for participation in the Sunday Eucharist.

### **2. In relationship to what you have identified, consider what your parish is ready to accept and/or able to manage (even with some stretching).**

For example – A parish might be made up of so many commuters who don't get home until 7:00 p.m. that doing a public Evening Prayer at 5:30 or 6:00 just will not work. Or, the spirituality of the parish might be so "Episcopal Lite" that it wouldn't be possible to even gather a small group for EP.

Ability to manage it (inadequate resources, can't fit situation, lack of support from authority, lack of cooperation from key people, etc.)

We could not manage this	1	2	3	4	5	We could do this easily
--------------------------	---	---	---	---	---	-------------------------

Adequate base of understanding, competence, emotional/spiritual maturity

Inadequate base	1	2	3	4	5	Strong base
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Other considerations about "system readiness".

### **3. Building system readiness – what needs to be done to rearrange elements of the system and/or to create the competence needed?**

For example – Regardless of how low your ratings are in #2, you can make progress toward your objective if you work out -- what are the things that need to happen in the parish to build readiness? So, if the parish has an inadequate base of spiritual discipline and competence you may need to do a lot of work with Benedictine spirituality, developing common language in the system with the Christian Life Model, and using an Office (at least a part of the day's psalm and reading, and a couple of collects) at every meeting, class and gathering. Or if having a corporate form of the Office just doesn't work because of people's commuter schedule – train people for individual use, provide a number of alternative methods for doing the Office (short forms that can be memorized, web, small cards, make it easy for people to order a Daily Office book); do the Office at all parish gatherings; on the parish web site say that the Office is said by individuals and families (and that the clergy will train others to participate).

## TASK: St. Peter's Case

**Role:** You are members of a diocesan consultant network

**Task:** To help two of your colleagues think about the work ahead in their consultation with St. Peter's; especially to get some initial impression of what the dynamics may be, what hunches people have about the religious dynamics in the parish, what might be the first steps of the intervention, and so on

### In team

1. Read case (5 min)
2. Team work on case (45 min or as announced)
3. Reflect/Learn – facilitated by trainer
  - a. On use of participant skills (*Shared Leadership*)

Close this segment by asking people to share what they have learned. May be related to learning goal set earlier or may have emerged.

- b. Then shift the reflection to --*Trust Development in Organizations*  
**3 – 11** How has this played out in your team? To what extent have you progressed?

Close segment by asking people to share any learnings about trust development; e.g., "I learned ..." OR "Something I would do differently is ..."

## Case: St. Peter's Church, Paris, Massachusetts

You are members of a diocesan consultant network. Two members are about to begin a consultation with St. Peter's Church. They have asked the group to help them think about the work ahead; especially to get some initial impression of what the dynamics may be, what hunches people have about the religious dynamics in the parish, what might be the first steps of the intervention, and so on. The team wants to start by getting a read on the core dynamics of spirituality that exist in the parish. Their experience has been that it is a good starting place and often opens up a parish to new ways of seeing itself. They are concerned about what they see as anxiety on the bishop's part (seeking quick results) and anxiety in the vicar (feeling judged). The network has broken into small groups to discuss all this. The assigned consultants are not in your group. You will explore the situation and newsprint your ideas as you go along.

St. Peter's, with some nudging by the bishop, has asked for a consultation. Bishop Dell has told the consultants that he finds himself wondering about the parish's "viability." The bishop said, "They just seem to plod along year after year. There is little sense of mission. They are very narrow in their thinking. Almost no innovation in the place. The diocese isn't putting much into them (about \$5000 in aid each year) but other places could make better use of the aid. My predecessor was inclined to just let things ride with this kind of place. My hope is to be a careful steward of the diocese's resources. So, I've told the vicar that they need to work with you. Truth is, I wonder if we should just close them. They should be twice the size they are. We need growth in this diocese! I hope you can do something with them."

The consulting team did have a first phone conversation with the vicar. They felt that she was very agitated at having to have a consultation. The vicar, Mary Alaska, told them "This bishop has been laying this vague pressure on me and the parish since his consecration 18 months ago. I can't quite understand what he wants. He simply seems unhappy with me and the parish. Everytime I see him he asks 'how things are coming along at St. Peter's.' I feel like I'm under a microscope. I need to be trusted to do my job. I've been here for eight years and love the place and the people. I've thought of moving on and taking one more parish before I take the '30 and out' option but this feels like home. I'm not sure I want to put up with all this."

Here's some of the information you have gathered from diocesan files and what the consultants gathered from the bishop and vicar.

The parish has two celebrations of the Eucharist on Sunday. The 7:30 gets around 18 people, the 10 around 80 adults and between 6 and 11 children. In a two year old self assessment the vestry indicated the following:

1. My overall satisfaction with the parish is:

Very            1        2        3        4        5        6        Very

dissatisfied		/	//	////	////		Satisfied
					////	////	
					////	////	
					////	////	
2. My feelings about adult education in the parish are:							
Very	1	2	3	4	5	6	Very
dissatisfied							Satisfied
				////	////	///	
					////	////	
3. Assessment of worship							
Very	1	2	3	4	5	6	Very
dissatisfied							Satisfied
		/		///	////	////	
					////	////	
4. Sunday School							
Very	1	2	3	4	5	6	Very
dissatisfied							Satisfied
		///	//	////	////		
					/		
5. Relationship between lay leaders and the vicar							
Very	1	2	3	4	5	6	Very
dissatisfied							Satisfied
			//	///	////	////	
					////	////	
					//		

An assessment by a visiting team from diocesan council three years ago said:

Potential of the parish - for deepening spiritual life, membership growth, service to others,, etc.

Very Low	1	2	3	4	5	6	Very High
					//	///	

The visiting team reported that the parish had many gifted people and a depth to its prayer life. There was some feeling that vicar was a good priest, but in need of some personal renewal if the next ten years wasn't going to be a "coast into retirement".

Financially the parish almost meets its budget. The diocese's \$5000 is about the same amount as the parish sends back to the diocese for its assessment.

The parish has been experiencing slow growth for the past few years. Adding a few people each year. When asked why they join St. Peter's people have most commonly mentioned the liturgy. One comment from a new person was "it feels like worship to me. There is some richness and depth in the Eucharist."

The parish is in what has been a rural area. Some farming, small businesses in the village, etc. The parish includes a number of teachers, some business people, a couple of farmers, and a growing group that commutes to the city for work (about a 1-hour commute). There has been no significant increase in new housing in the area but there are rumors that may change.

The vicar's warden has served in the position several time over the years. He has been at St. Peter's for over 45 years. He is a retired high school teacher. He is proud to have been involved in all the changes St. Peter's has been through -- the new books, accepting the first women vicar in this area of the diocese, becoming Eucharistically centered. The People's Warden is relatively new to the parish. She moved into the area to start a pottery workshop. She is in her mid 30's and became an Episcopalian 7 years ago just after experiencing a bitter divorce. She has been frustrated with the how the parish doesn't seem to have much appreciation for the life members have outside of what they do in and for the parish. In the parish where she joined the Episcopal Church there was a practice of having programs and discernment groups in which people could explore their work and interests as part of their spiritual life. In her opinion St. Peter's is too Sunday focused.

Education for adults in the parish has tended to be sporadic and focused around Bible study. Participation has been limited and there hasn't been much pressure for more according to the vicar. On a couple of occasions she has tried to start prayer groups, have quiet days or a parish spiritual life retreat but "Only 6 or 7 people would show up, so I dropped it. There's no sense in having things for just a few people."

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## Core Frameworks      Application Exercise -- Use of Models

### Objectives:

1. Increase understanding of core frameworks
2. Increase ability to "talk through" a model in assessing a parish
3. Increase facilitation skills

### Overall

- In teams - Each team use the core frameworks to do a diagnosis of each participant's parish. Rotate through the team. Each team needs to manage its time, including breaks. Need to be disciplined as a group. Trainer will keep time, facilitate reflect/learn on facilitators.
- Everyone will have an opportunity to present. Everyone will have an opportunity to facilitate and receive feedback.
- Session may continue into the next session. If one team is smaller and takes less time - take a break or trainer engage the team with some learning process

Each Cycle – up to 35 minutes to present & explore; 5-8 min/ for feedback to facilitator

#### **Presentation & Exploration**

10 min

1. Presenter say what core framework he/she will use
2. Facilitator put outline of framework on newsprint, while ..
3. Presenter "talks through" the framework in diagnosis of the parish. Presenter needs to be focused and move quickly through key elements. It will help if the presenter avoids offering any background or comments not directly related to diagnosing the parish by "talking through" the framework.

Up to 25 minutes

4. Facilitator make notes on newsprint – as possible in relation to elements of the framework
- Facilitator invites the team to engage the task. Participants also "talk through" the framework. Ask questions; reflect back what they are hearing; offer hunches or wonderments. Presenter may ask participants to explore a particular element.

Trainer calls "time"

5 – 8 minutes

#### **Feedback to facilitator**

Trainer facilitate process

1. Facilitator self-assess – What I think I did well. Something I might have done differently is .." (2 minutes)
2. Team offer feedback (3 – 6 min.)

Special attention to issues of 1). Managing pace and flow; 2). Recording in speaker's words; 3). Keeping newsprint visible; 4.) Helping team stay with task and process; and other skills noted in manual. Trainer may write list of several key skills on newsprint if needed.

#### **MOVE TO NEXT PRESENTER**

*Trainers will adjust time frame as needed.*



# Rating Team Effectiveness

## 1. Direction & Goals

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

Confused; conflicting; unrealistic; uninteresting to or no "ownership by" members

Clear and shared by all; important to all; "owned"

Comments:

## 2. Participation in Team Meetings

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

A few dominate; some listen; several talk at once or interrupt

All participate; all are listened to

Comments:

## 3. Expression of Feelings

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

Feelings are unexpressed, ignored or criticized

Freely expressed; empathetic responses

Comments:

## 4. Planning to Accomplish the Team's Work

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

Done by one or two

Shared by all members

Comments:

## 5. Decisions

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

Needed decisions don't get made; decisions made by one person or clique; others uncommitted

Agreement sought and tested; differences used to improve decisions; decisions made are fully supported

Comments:

## 6. Shared Leadership for Team Work

**Poor 1 2 3 4 5 6 7 8 9 10 Good**

---

Team depends on one person or a clique; little shared sense of responsibility for team success

Team needs are met by various members; strong sense of shared responsibility

Comments:

## Assessing Client Readiness

During the contact and entry stage, the consultant needs to assess the client's readiness for the proposed project. After the initial contact and after (or during) the exploratory meeting, the consultant can review these issues:

1. The degree of openness -- does there appear to be a willingness to share information, investigate rather than assume, explore options, etc.
2. Makes sense -- there seems to be something to work on that makes sense to you
3. Appropriate use of a consultant -- what you are hearing about your role seems appropriate; you are not hearing assumptions about your role that concern you, e.g., client sounds too dependent or too counter-dependent, seeking a "quick fix", wants your affirmation of an already established course of action, etc.
4. Investment -- the client is ready to invest the necessary time, funds, people, etc. to set this up for success

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# Task: St. Gabriel's Church

## Situation

You are the Liturgy Team for the parish. Note: Do not get into wondering which of you is the rector or in other roles. It is not a role play.

Eight years ago, the former rector, established a pattern of mid week Masses as follows –

<b>Day</b>	<b>Time</b>	<b>Rationale</b>
Monday & Tuesday	No Masses	Rector time off
Wednesday	10:00 a.m.	Several retired people attended regularly
Thursday	6:30 p.m.	Just before choir rehearsal; about 7 choir members attended
Friday	6:45 a.m.	A group of men had the practice of coming to Mass and cooking breakfast together in the parish hall
Saturday	9:30 a.m.	Members of altar guild attended before setting up for Sunday.

In addition to the rector there were two priest associates (non-stipendiary) who helped cover the Masses.

The new rector has been in place for six months and has noticed the following –

- There is just herself and one priest associate (non stipendiary; willing to cover occasional mid week and assist on Sunday)
- Attendance averages as follows

<b>Day</b>	<b>Time</b>	<b>Attendance</b>
Wednesday	10:00 a.m.	One person from the group that had been coming. People died and moved
Thursday	6:30 p.m.	Averages two people, just one from choir
Friday	6:45 a.m.	Usually no one attends. The men's group stopped meeting four years ago
Saturday	9:30 a.m.	Two

- The parish has a tradition of frequent Masses during the week. Back 10 years ago there were daily Masses. There are a number of people that see the frequency of Masses as part of the parish's character.
- The rector doesn't object to having Mass every day but is concerned about the existing schedule being disconnected from the original rationale.

## Task

[Time available TBA]

1. How would you help the parish approach the situation
2. What hunches and "wonderments" do you have that arise from the situation



NPO - Management Team MBTI Type Profile 2000

<p><u>I</u><u>S</u><u>T</u><u>J</u></p>	<p><u>I</u><u>S</u><u>F</u><u>J</u> Rachel</p>	<p><u>I</u><u>N</u><u>F</u><u>J</u></p>	<p><u>I</u><u>N</u><u>T</u><u>J</u> Martha [Ex Dir] Harold Anne Lorraine Jeannette [Co Ex Dir]</p>
<p><u>I</u><u>S</u><u>T</u><u>P</u></p>	<p><u>I</u><u>S</u><u>F</u><u>P</u></p>	<p><u>I</u><u>N</u><u>F</u><u>P</u>  [ OD consultant]</p>	<p><u>I</u><u>N</u><u>T</u><u>P</u></p>
<p><u>E</u><u>S</u><u>T</u><u>P</u></p>	<p><u>E</u><u>S</u><u>F</u><u>P</u></p>	<p><u>E</u><u>N</u><u>F</u><u>P</u> Michelle</p>	<p><u>E</u><u>N</u><u>T</u><u>P</u></p>
<p><u>E</u><u>S</u><u>T</u><u>J</u> Tracy</p>	<p><u>E</u><u>S</u><u>F</u><u>J</u> Rose Kim</p>	<p><u>E</u><u>N</u><u>F</u><u>J</u></p>	<p><u>E</u><u>N</u><u>T</u><u>J</u> Alix John Julie</p>

Underlined are the dominant function; and italicized are the auxiliary function, of each type.

NPO - Management Team MBTI Type Profile - 2005

IS <u>T</u> J	IS <u>F</u> J Kristen	IN <u>F</u> J	IN <u>T</u> J Martha [Ex Dir] Bill Anne
IS <u>T</u> P	IS <u>F</u> P	IN <u>F</u> P Chris [ OD consultant]	IN <u>T</u> P
ES <u>T</u> P	ES <u>F</u> P	EN <u>F</u> P Tammy	EN <u>T</u> P
ES <u>T</u> J Beth Markis	ES <u>F</u> J Rose	EN <u>F</u> J Andrea	EN <u>T</u> J

Underlined are the dominant function; and italicized are the auxiliary function, of each type.

## Church Y -- Parish Leaders 1995

ISTJ Craig	ISFJ	INFJ Richard (rector) - (or ESFJ)	INTJ Lynn
ISTP Clayton	ISFP Tamber Errol	INFP Gerry Kelli [consultant]	INTP Debbie
ESTP	ESFP	ENFP Clair Dan JD	ENTP Val Sidney (INFP) Terry (ESFP)
ESTJ	ESFJ	ENFJ Kate Bob N. (or ESFJ)	ENTJ Dave Jim

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

Church Y - Parish Leaders 2001

<u>I</u> STJ Janet S.	<u>I</u> SFJ Mary M. Rick	<u>I</u> NFJ Richard (rector)	<u>I</u> NTJ Sara (INFP) Andrew
<u>I</u> STP	<u>I</u> SFP	<u>I</u> NFP Vickie (INFJ) Chris F. Brion [Consultant]	<u>I</u> NTJ
<u>E</u> STP	<u>E</u> SFP	<u>E</u> NFP	<u>E</u> NTJ Ginny Sidney Val Chris A.
<u>E</u> STJ Mitch Mike	<u>E</u> SFJ Christine Kathleen	<u>E</u> NFJ	<u>E</u> NTJ

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



# Church Y -- Organizational Character Profile 2001

<u>I</u> STJ <b>X</b>	<u>I</u> SFJ XX	<u>I</u> NFJ	<u>I</u> NTJ
<u>I</u> STP	<u>I</u> SFP X X X X	<u>I</u> NFP X X X X X X X X X X X	<u>I</u> NTP
<u>E</u> STP	<u>E</u> SFP	<u>E</u> NFP X	<u>E</u> NTP
<u>E</u> STJ	<u>E</u> SFJ	<u>E</u> NFJ	<u>E</u> NTJ

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



## Saint Luke's Parish: exploring options for the future

You are a consulting team. You will be meeting with the rector and vestry of Saint Luke's. It is a historic African American parish that has been declining in membership for many years. There is now an average attendance of 60 adults on Sunday. The diocese has been providing "loans" to help the parish manage over the past two years. Parish leaders are clear that the financial situation will overwhelm them this year. All the current members commute to the parish. They come from areas across the diocese.

The parish is in what has become populated with people who are: mostly white, professional couples, gay and straight, with children. The cost of property has doubled several times in the past 12 years.

They want a process to help them explore the choices they face. They have agreed to a two-hour meeting next week and are expecting a second longer meeting after that. They have agreed to do some work in between the meetings.

Newsprint your work to share with the whole group.

1. Develop a broad overview of the two meetings and the work in between meetings?
2. Design the first meeting.
3. What would you ask them to do as a follow-up to the session and in preparation for the second meeting?

Hint on your team's process: These are not necessarily linear steps. You may find yourself moving back-and-forth among the three tasks.

## Use of Self ... Self Assessment

These skills are ones that the participant will have the opportunity to work on during CDI. The participant will still need to give themselves to the process by their energy and asking for feedback.

Skill area	Don't even understand what it means	Weak ability	Working on it	Some improvement	Significant improvement
<p><b>Awareness of &amp; Management of filters</b> (e.g., increased awareness of the web of feelings and thought patterns that you bring into a situation; its impact on decision making; etc.)</p>					
<p><b>Adaptability</b> (e.g., Flexibility in handling change; able to see several ways of understanding a situation; seeing options for intervention; etc.)</p>					
<p><b>Political awareness &amp; skills</b> (e.g., Reading a group's emotional currents and power relationships. Effective use of influence; Wielding effective tactics for persuasion; presentations to appeal to the listener; etc.)</p>					
<p><b>Communication</b> (e.g., Effective in give-and-take, registering emotional cues in attuning your message; Listen well, seek mutual understanding, and welcome sharing of information fully; Foster open communication and stay receptive to bad news as well as good; using core communication skills, etc.)</p>					
<p><b>Collaboration and cooperation</b> (e.g., Working with others toward shared goals; Balance a focus on task with attention to relationships; Promote a cooperative climate; etc.)</p>					

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## Task: A Case on Diocesan Intervention Strategy

### Diocesan System for Congregational Development

#### STEPS

- In plenary – set up case (20 min) –
- In Team(s) – Work on case (60 minutes or as announced)
- Break if needed (5 min)
- Plenary Session – Teams present possible intervention strategy; rationale for intervention strategy. Whole group explore in terms of trust development, diocesan primary task, intervention issues, etc. (40 min +/-)

#### THE CASE

For several years the diocese has been caught up in conflict between the former bishop and his supporters and the bishop's critics. There is now a new bishop.

#### Role

You are the newly elected bishop and the new diocesan staff. Please – no role playing; don't worry about who is the bishop.

#### Task

Create an intervention strategy to increase trust between the bishop's office and parish leaders. The lack of trust has interfered with your ability to make effective interventions for congregational development.

#### **Background**

Bishop 1 – In place for 20 years; he hated national church, they were too liberal; the diocese was quiet but many were bothered by bishop's narrowness. Region was relatively open minded. The Episcopal Church, as expressed in this diocese, had developed a closed minded reputation. As time went on many lay leaders began to see the bishop as an embarrassment.

Bishop 2 – Was bishop for 10 years; liberal on social issues, moderate theologically. He had a strong urban ministry commitment. He could not stand conflict or tensions that might lead to conflict; so, a lot was left unsaid in the diocese for fear of hurting the bishop's feelings

Bishop 3 – Was bishop for 5 years; very liberal He won a close election over a more moderate person. He was a strong NT with little self awareness of the impact he had on people. The diocese had an NF – SF split. This overlapped with tensions around political influence in the diocese. Those who had been influential had little influence with the new bishop. His behavior at times seemed erratic. After a lot of conflict he was forced out.

While all the conflict has been going on:

- Marginal parishes have declined; stronger parishes have held their own but become more detached from the diocese; opportunities to help some parishes become healthier have been missed
- Some of the best clergy have left the diocese
- Trust between the diocesan office and parish leaders was very low; even the supporters of the bishop admit that they have often felt undercut and abandoned by the bishop

Bishop 4 – He was elected 8 months ago; has appointed a new staff.

## Task: Shape of Parish (Cycle Two)

**All times are estimated. Trainers will make changes as needed.**

1. Form groups (number of groups needs to match number of trainers available); this will be the participant's team for first part of the cycle) [10 min]
2. In the team -- Trainer introduces the task [5 min] (**refer to handout on Task**)
- 3. Task:** Work as though you are all from the same parish.
  - Each person identify three people in leadership positions in your parish
  - do a **diagnosis in terms of "Shape of the Parish."** Assume this is your parish's leadership group.
4. Individual work - how you would assess the three people you have identified -- relate to Shape of Parish model by placing people as best you can in the circles of the model; you are making a "hunch."
5. Facilitator Role – based on **5-7** in Manual -trainer brief the facilitator (best if it can be someone returning to CDI) in front of group. Use as way of connecting everyone with facilitator skills (focus on -- fast pace -- have each quickly identify hunch re. where person is on Shape of Parish Model (and why); then go back and explore as appropriate - hear more about the people, hear impressions about total parish, etc. [10 min to brief]
6. Do – group engage task [25 - 40 min]
7. Reflection & Learning [35 min]  
**Trainer lead**
  - Facilitator skills (**5-7**) [8 min]
  - Participant skills (in terms of self-differentiation model **5-49**) [10 min]
  - Use of model, skill in making hunches, etc. [8 min]

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## Group Task - Faith Church

***The group has about 45 min +/- of time for the task itself, a break and trainer and/or participant interventions to ask group to reflect on how it is working will take up rest of time.***

**Group Task:** Develop a strategy rooted in the Shape of the Parish model for the health and faithfulness of Faith Church.

Assume that this is a continuation of the group's earlier work. Use the data from that session in this task. Assume that the leadership group of Faith Church is the group you mapped earlier in relationship to "Shape of the Parish."

**Roles:** You are the Congregational Development group at Faith Church; do not take on specific roles (e.g., whose the rector) or become "actors." People might rotate the facilitator role (allows several people to have the experience)

### **Process Notes:**

1. You will have a total of about 1 hour 45 minutes. Roughly 45 minutes of that will be actual work on the task; about 10 minutes for breaks; and the rest of the time for Reflection & Learning Process.
2. Whenever you shift facilitators -- use the feedback process with the outgoing
3. Take breaks as the group decides (break time is part of the 1 hour 45 minutes)
4. Make use of group facilitator and participant skills.
5. The group will need to do all the activities usual for a work group, e.g., defining the task for itself, developing any needed clarity about models (Shape of the Parish, PPC, etc.), self differentiated leadership.

## Faith Episcopal Church

Faith has an average Sunday adult attendance of 145, with a baptized membership of 220. Peter Notes has been rector for 3 years. Peter is 42 years old. This is his first time "in charge." The parish is located just outside of the center city area of a mid sized city in Wisconsin. In Peter's first year or so he worked at being very affirming of people and the parish's traditions. He had learned in a pastoral care class in seminary to never change anything in your first 18 months. He now wondered whose idea that was. Peter has been frustrated with his work in the parish for some time now. He had been the owner of a restaurant in the city before going to seminary. He loved the business and the people he worked with. He had begun to feel some longing for the life he had when he was in business.

The parish has two celebrations of the Eucharist on Sunday - 8:00 a.m. and 10:00 a.m. Peter is a fairly good preacher and an adequate liturgist He understands how to do good liturgy but comes off a bit hesitant at the altar, like he isn't quite sure what comes next. He would like to introduce some changes that he thinks would add a bit of grace to the liturgy but has heard some grumbling when he has mentioned it. There has been no membership growth in the past five years. The parish holds its own with people coming and going.

Peter's prayer life has been a struggle since getting out of seminary. He enjoyed the structured environment of the seminary and had been very faithful about chapel attendance. When he first arrived he suggested that some people might want to get together for Morning Prayer on weekdays. No one expressed any interest so he let it drop (both the idea and his own saying of the Office). He offered a class on the Eucharist and had three participants. He enjoyed the class but was discouraged by the lack of response. Since then he has offered some education during lent each year. Each program was on the Bible and had the same 6 people.

The Rector's Warden has suggested to Peter that he needed to let the vestry run things "as it always had." Peter's sense is that it wasn't really the vestry running things but a small group of people who had been members for over 20 years. This group keeps telling stories about how they came together when the parish was "on hard times, with no future." Communications are word of mouth with an occasional newsletter. The rector and a few members thought that having a web site might be a good idea. They did get up a fairly basic site but were not able to invest the money needed to make it very attractive or interesting. The vestry only agreed to half of the funds the group thought necessary.

Over the past three years Peter has discovered a significant number of people who wish the parish would change. Several are transfers from other areas of the country. Some are long term members who have been going to programs outside the parish, e.g., EFM, and diocesan programs of the spiritual life and social responsibility. When the diocese offered a training program in congregational development Peter recruited several people to go with him. They have been through part of the program. The vestry agreed to cover 2/3 of the cost of attending and for them to be the parish's congregational development committee (CD group).

The group has been meeting to work out a congregational development strategy for Faith Church. They have done some interviewing of leaders as part of their participation in the diocesan program. They used the information from the interviews in an analysis of the parish in terms of the "Shape of the Parish" model. They have also looked at the context of the parish, its history, and their own hopes and dreams for Faith Church.

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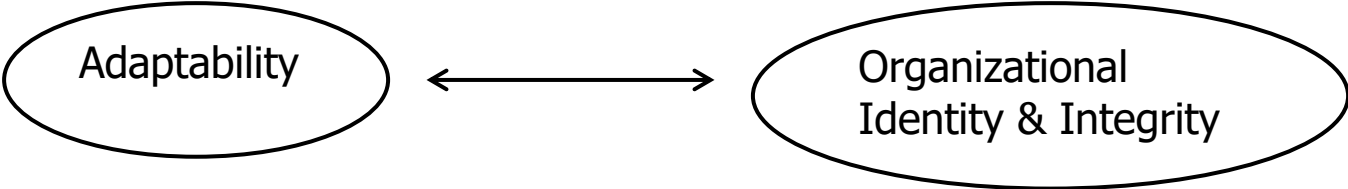


# Organizational Culture Notes & Hunches

Parish \_\_\_\_\_

Notes on Odds & Ends (size, things noticed, phrases spoken, etc,)

What are the issues in:



	<b>Ways of doing things; ways of working; group norms and behavior</b>	<b>Espoused Values</b>	<b>Deeper Assumptions in Operation -- hunches, wonderings</b>
<b>Formation of Adults</b>			
<b>Attracting New Members</b>			
<b>Managing Change</b>			

# Parish Visit Teams and Preparation

## Preparation

1. Do not prepare as a team! Talking about who will ask what questions, in what order, etc.-- does not fit the style of these visits. It usually helps for the team to have someone who they see as the "lead interviewer." That person can set the pace and steer things a bit (not too much). The team may also decide to have just 2 -3 people asking the questions while the others are looking within the answers for information about organizational culture.
2. A CDI trainer will brief the whole group before the first interview begins. There may also be interruptions by the trainer in the course of the interview to suggest an approach or a break to allow the team to check in.
3. Do prepared as an individual -- make notes on what questions might be useful; center yourself for the day (breath or walk in the early morning, etc); be clear about the assignment; be clear about the core issues in organizational culture we worked on, etc.
4. If you have a chance look at the parish web

## The Task

1. Gather information that may help you make reasonable "hunches" about the parish's culture.
2. Gather that information in around three broad aspects of parish life:
  - a. Christian formation of adults
  - b. Attracting new members
  - c. How they manage change
3. Watch out for any obsession about "covering everything." Learn what you can in the time we have.

## During the visits (as a whole group and on your own on a Sunday)

1. You are looking for information about culture -- that will mean touching on things like size, programs, ministries, etc. But watch the follow up questions -- they need to keep exploring what the priest values, what the congregation says it values, how they do things, how that has been changing. Stay focused on your task.
2. Take notes -- not about recording what the person says but what you are hearing and seeing regarding core issues in organizational culture.
3. Notice the physical space -- what does it suggest about the values of the parish; "ways of doing things"; etc.
4. Notice printed materials - handouts, postings, etc.
5. Pay attention to the impact you are having on the host, on others in CDI. We are seeking an informal climate -- openness, sense of exploration and wonderment, curiosity, etc.
6. Avoid using CDI jargon. Ask questions and test out ideas in plain language. Notice the way the hosts speak - try to match that level
7. Allow the primary team to take the lead and to redirect the conversation --- without them having to show any exercise of control. Just pay attention! Do actively participate in all session yourself, but monitor what you are doing.
8. Use your skills -- self-differentiation, facilitative intervention, your knowledge re culture, core frameworks, etc.

## Task - Visitors from the Parishes to CDI Session

- Visitors from the parishes (if any) are taken to another space to prepare themselves to observe, and if willing to offer some response to what they hear.

### 1. Share what you think the CDI visiting team might say when they report out. They are working with these questions

What are your hunches about --

1. What have been the high points in the life of this organization -- when people felt most alive, excited, energized, involved, committed, fulfilled, etc.?

2. What do people most value about the organization?

3. What has the organization done "really well"? Over a period of time?

4. What is at the "heart" of this organization?

5. What factors (leadership approach, strategy, climate, values, processes, etc) in the organization have made significant contributions toward organizational excellence, health, success?

### 2. What did the visits set off in you or the parish? -- within you (feelings, thoughts), conversation with others, actions, etc.

## TASK -- Parish visit groups

### 1. Newsprint appreciative statements [15 min]

- Respond to appreciative questions (also in manual 3-49)
- Do in a brainstorming process

What are your hunches about --

1. What have been the high points in the life of this organization -- when people felt most alive, excited, energized, involved, committed, fulfilled, etc.?
2. What do people most value about the organization?
3. What has the organization done "really well"? Over a period of time?
4. What is at the "heart" of this organization?
5. What factors (leadership approach, strategy, climate, values, processes, etc) in the organization have made significant contributions toward organizational excellence, health, success?

Note - these questions are usually part of an interviewing process in which the practitioner is interviewing members/clients or they are interviewing one another and reporting back to the larger group. We are using them as a way of forming our "hunches" about what may be true in the places we have visited.

### 2. Newsprint "wonderings"

- Statements need to be real wondering rather than a cover for criticism, or advise giving ("you should")

# The Facilitative Intervention

The facilitative intervention, and the related types of interventions, is part of Edgar Schein's process consultation approach. The practitioner, leader or consultant, is focused on helping the group make movement in the direction the group has decide on. This calls on the practitioner to set aside her own needs for showing how insightful or strategic she is; and to serve the group by facilitating the group's capacity for insight and strategy. If the practitioner is also an organizational leader, she will need to manage the need to facilitate the group and thereby build its capacity and ownership, with the need for the action to be taken to also reflect her best judgment. Not an easy task, but frequently a necessary one. Schein writes "The key tenet of process consultation philosophy is that the clients own and must continue to own their own problem.

## Types of Interventions

In general the early interventions named require less trust and relationship then the later ones. Also, in practice the interventions overlap each other.

Type of Intervention	One-on-One Use	Group & Inter-group Use
<b>Active, interested Listening</b> (exploratory)	Empathy, work to see the issue from the client's perspective	Observe process forces -- patterns of communication, decision making, and behaviors that assist the task or relationship maintenance, etc. Practitioner might then intervene by clarifying, summarizing or consensus testing.
<b>Forced Historical Reconstruction</b> (diagnostic)	Ask the client to reconstruct some of the events that led up to the current situation	Might use when the group is confused about the results it is getting; e.g., group can't come to agreement about direction. Intervention - could we reconstruct the past 2 hours to see what we've been doing?
<b>Forced Concretization</b> (diagnostic)	Moving the client from broad, general statements of the issue to more concrete expression, e.g., when did that happen?, who was in the room?, how has that expressed itself in other places?, etc.	Facilitate concrete descriptions to fill out general comments about the group or meeting, e.g., our problem is communication! Practitioner might ask -- What brings you to say that? Would you share a few examples? How would you describe the type of communication we have been having?
<b>Forced Process Emphasis</b> (diagnostic)	Moving the client from primarily describing the issue in content terms to process terms, e.g., what were the phases of what happen?, please reconstruct the flow? Etc.	Asking the group to describe the process in concrete ways.

**Diagnostic Questions & Probes** (diagnostic, action oriented)

Practitioner test his own understanding of the issue by offering tentative statements, i.e., offers his own hunches about the situation. For example, "Is this happening because ...?"; "What I hear happening to you is ...?" OR Invites the client to go deeper, e.g., "What is your hunch about why this is happening? .. about the underlying assumptions driving this behavior?", etc.

Practitioner tests hunches with the group OR invites the group to share its hunches.

**Process Management & Agenda Setting** (confrontive)

Getting the client to focus the discussion/meeting in specific content or process areas, - "John, when we meet I'd like us to explore how you might stay connected with those you find frustrating.

Many OD interventions fit this category, e.g., inter-group exercise, mirroring, survey-feedback processes, open systems planning, etc. Practitioner stays focused on managing the process not offering his own solutions.

**Feedback** (confrontive)

Practitioner offers the client feedback in relationship to the goals the client has for herself (not just reactions the practitioner has toward the client).

Survey-feedback processes. Take care with the kinds of questions asked and to whom the information is fed back. Don't want questions in which people are telling leaders what's wrong - with the assumption that it's the leader's responsibility to "fix it." Encourages abdication of responsibility & reduces a empowerment. The group you gather information from needs to be the group that will act to improve the situation after the feedback session.

**Content Suggestions & Recommendations** (confrontive)

Offering suggestions in the content area - "How about stopping sending any more e-mail messages to him? You might try that and see if it reduces the tension between you and your own stress level. " Possible try offering a range of options the client might consider.

For example, "I'd propose that you focus your attention on building the spirit of hospitality you discussed before you begin advertising for new members."

**Structure Management** (confrontive)

Change the structure of the situation, e.g., a different meeting time or place.

For example, arrange the physical space to better serve communication & decision-making. Suggesting that the group membership be changed in some way.

**Conceptual Inputs** (potentially confrontive)

Educate client. Offering theory & models to help the client's sense of perspective & ability to see new choices. Probably avoiding making connections for the client; letting the client make his own connections between the theory and what is happening.

Educate the group ...

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Based on the work of Edgar Schein in *Process Consultation*, Vol. II, Addison-Wesley, 1987

## TASK -- Merger Case: Saint Mary's and St Luke's

**Role:** You are a team of consultants paid for by the diocese to assist in the merger exploration.

**Task:** What is the next step? Design the intervention. Take Intervention Theory into account.

---

### Merger Case: Saint Mary's and St Luke's

Saint Mary's is a historic African American parish. It has an average attendance of 50 (5 at 8:00 a.m. and the rest at 10:00). There are two white women who are long-term members; all the others are black. Most members are in their 60's and 70's, retired teachers and government workers are common, most have been with the parish more than 25 years. The parish is no longer financially viable. After exploring the options they had (e.g., redevelopment at current location, close, etc.) they decided to invite St. Luke's to consider merging with them.

Saint Luke's has an average attendance of 65. It is 80% white and 20% African American. About 1/3 of the members are gay or lesbian. Pledge units have declined over the past five years (from 72 – 60 – 62 – 48 – 33). The average pledge has doubled in that period allowing the parish to more or less maintain its pattern of life. That seems to have reached a breaking point this year; 33 pledges are just too few. The vestry agreed to explore merger with St. Mary's. During the past 18 months there have been a variety of proposals put forward by individuals and sub-groups within the parish – cut office staff, go to half-time positions for all staff including clergy, increase rentals, and merge. There are now factions formed around the various proposals.

The two parishes have formed a merger team to guide the exploration. They have had one open meeting (data attached) and shared Sunday mornings together on five occasions. The shared Eucharist's and coffee hours have been mostly well received in both parishes. There are six people at Saint Luke's who have taken a public position against the merger and are actively disrupting the exploration process by a campaign of letter writing, phone calling around the parish, accusing the rector of favoring the merger for personal gain, and refusing to receive communion. Some members are staying away out of discomfort. Saint Mary's rector is confident that his parish will want to merge. The leadership at St. Luke's is uncertain of where things stand.

The clergy in both parishes are close to retirement. The diocese is committed to maintaining a parish in this area of the city.

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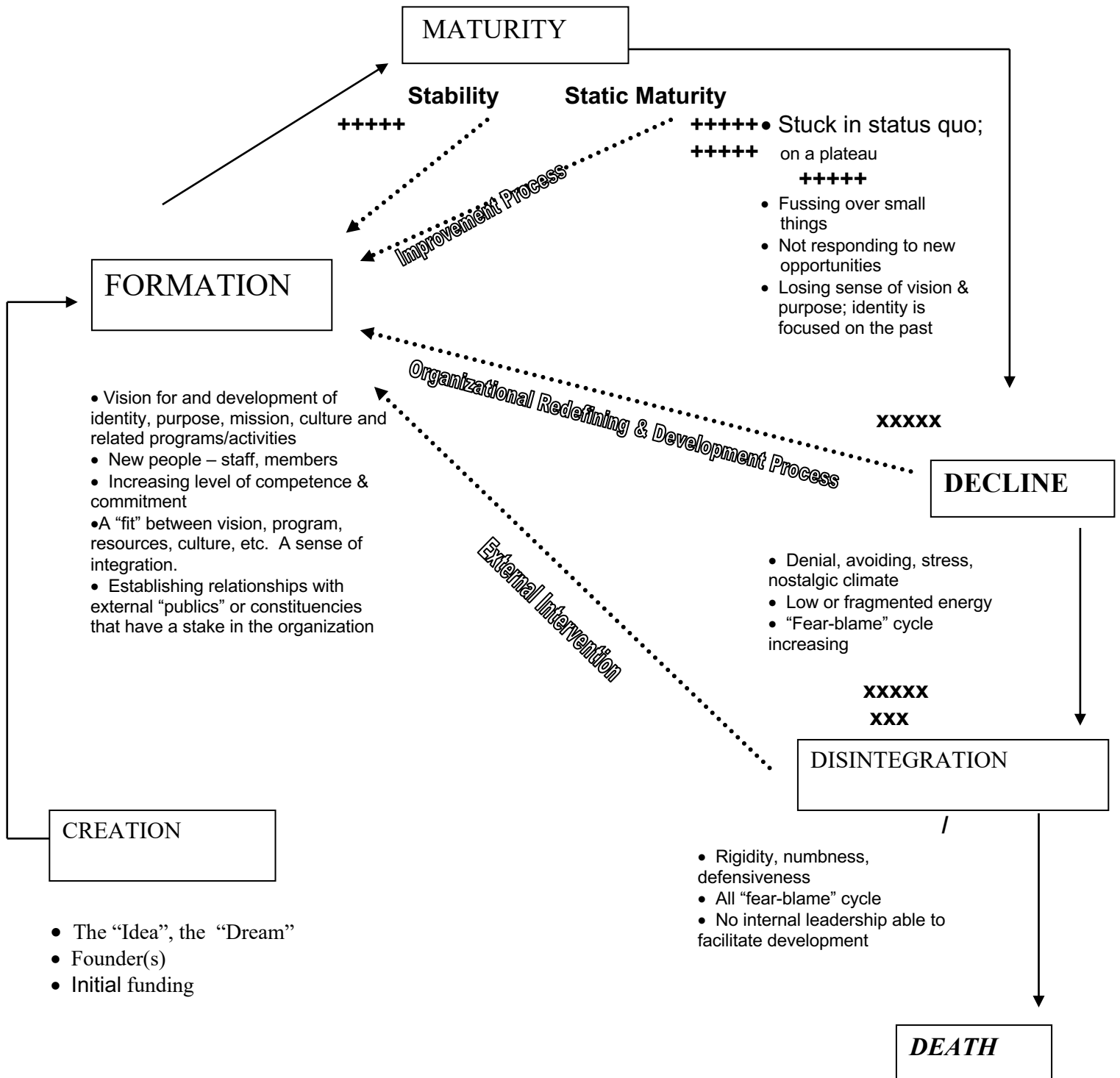


# ORGANIZATIONAL LIFE CYCLE

**Saint Luke's +++**

**Saint Mary's xxx**

At meeting with leaders of the two parishes



## WORSHIP CATEGORIES in the Episcopal Church

**Saint Luke's +++**

**Saint Mary's xxx**

At meeting with leaders of the two parishes

These categories are based on those suggested in Episcopal Life, April 1999.

<b>CATEGORY</b>	<i>Place a check mark next to <b>those strongly expressed in your parish</b></i>	<i>Place a mark next to <b>those you found helpful in sustaining your spiritual life over time</b></i>	<i>Place a mark next to one that you <b>wish were more expressed in your parish</b> (you may also leave this empty if there are none)</i>
<b>Prayer Book Catholic:</b> "full, rich liturgy, good music, beautiful ceremonial, good use of building, nice visual stuff, icons" ... "Strong congregational music, a broad spectrum of the church's orders participating (lay, priest, deacon), and thoughtful preaching... when the liturgy gets too fussy or too casual, its beauty and its ability to transform is largely lost" (Neil Alexander)	+++  xxx	+++	
<b>Anglo Catholic:</b> Everything as in "Prayer Book Catholic" but with more attention to sensual elements - incense, bells, images; sing the liturgy; attention to the beauty of the liturgy; sense of mystery and rhythm usually strong. "From a Catholic viewpoint, worshipping Christ present in the Sacrament of the Eucharist is an experience so profound that words become inadequate and ceremonial gestures, such as the sign of the cross and genuflections, serve to express some of what we cannot put into speech." (Church of the Advent, Boston, web site)	+++++ +++++ +++++ +++  xxx	xxxx	
<b>Broad Church:</b> Desire to be as comprehensive as possible; broad, liberal spirit. Broad church is more difficult to define because each parish will interpret liturgy in different ways.	++  xx	++  xx	
<b>Evangelical:</b> "...worship has got to be grounded and rooted in broadly evangelical preaching; .. marked also by an appreciation of good music .. We affirm the Western tradition of hymnody and liturgical music because it is time-tested and has been fed by many artist of genius; ..dignified. This is to say, ordered, objective; predictable or better consistent; and most importantly, vertical and transcendent. It is God centered, not minister-centered (Paul Zahl)	+	+	
<b>Charismatic:</b> "may be prayers for healing... speaking in tongues .. Freer style of prayer.. Uplifted hands" (Ruth Meyers)			
<b>Innovative:</b> Moving beyond the Prayer Book or adding to it. Reordered space, liturgies, elements borrowed from other denominations.	x		

## Parish Size

**Saint Luke's +++**

**Saint Mary's xxx**

At meeting with leaders of the two parishes

	Very Small	Small	Middle	Moderately Large	Very Large
Average Sunday Adult Attendance	Under 50	40 - 100	75 - 200	150 - 400	Over 350
SIZE CURRENTLY	St. Mary's (50)	St. Luke's (65+)			
St. Mary's – if we merge		xxxxx xxxx			
St. Luke's – if we merge		+++++ +++++	+++++ +++++ ++		
Key Characteristics	Tight-knit group; regular interaction	Familiar faces; Dominant core group	Full time priest; "full program"	Diverse community & program	Comprehensive program; specialized staff
Typical Interaction Pattern	Know one another & regular interaction	Majority have regular interaction	Clergy & some lay have current information on members; most interact regularly, some only within sub-groups	Same as ← But only a core interact regularly; majority interact in sub-groups	No one has current information about all members. Regular interaction is all in sub-groups
Typical Communication Pattern	<b>Word of mouth</b>	Word of mouth; some print or web	Word of mouth in core group & sub-groups; print or web to reach others	In print or the web. Word of mouth in sub-groups	Print & web; word of mouth in staff and sub-groups
Typical Planning Pattern	Spontaneous, informal. Based on member experience	Usually spontaneous, informal. . Based on member experience	Usually formal; by vestry & rector. Based on group data and at times research	Formal. By vestry, rector & sub-groups. Often a lot of research	Formal. Vestry or planning group coordinates sub-groups. Usually uses a consultant. Formal research.
Typical Primary Roles of Clergy & Lay Leaders	Few people set the climate & direction. Often hold positions a long time. Clergy roles based on local tradition & denominational polity	Core exercise control. Those with influence are the same over years (regardless of formal role). Clergy roles based on local tradition & denominational polity	Vestry & rector set direction. Lay leaders have responsibility for some aspects of life (e.g., financial, property). Clergy involved in all aspects of parish life.	Vestry & rector set broad direction; coordinate work through sub-groups. More lay responsibility for program & ministries. Clergy involved in all aspects of parish life.	Vestry & rector set broad direction. Sub-groups & specialized staff manage defined areas.

Based on work of Doug Walrath, "Sizing up a Congregation"; Alban Institute, 1985



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Go to "Resources" Parish Booklets and Handouts

Updated versions of some manual material will be available for a fee on this site.

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# Making the Program Work for You

## **The approach to learning in CDI**

This is a highly integrated training experience that engages participants in the issues and dynamics faced as leaders and consultants -- you end up dealing with the congregational development situation in front of you, the dynamics in the working group, theory, how to intervene for faithfulness and health, and your own personality and impact on the situation - all at the same time. This involves learning to see and act on the options before you and to expand your range of intervention behavior. This is a powerful and intense learning experience, it's not for everyone, but it may be for you, if:

- You are seeking professional level training in church development
- You want a program that integrates organization development and spirituality
- You are willing to work hard
- You know that you, your competence and commitment, your emotional and spiritual maturity, is the most important thing brought into leadership and consultations. And you want to grow in all these things.

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### **1. Experiential Work**

We reflect on and learn from our experience together. That may include exploring:

**The "self"** in relationship to the system -- You may increase your understanding of the impact of your behavior on others; experiment with changes in behavior that will improve the congruence between intentions and impact; and increase your ability to learn from experience.

**The working group** – You may learn ways to help teams be more effective and efficient in their work?

**The organization** – You may learn how to improve the larger system (parish, diocese, workplace).

### **In reflecting on the experience we make use of:**

**The "Here & Now" experience** – We reflect on and what is happening in the group and in each of us during a piece of work?

**A disciplined process for learning from experience** -- We explore what has been happening by looking at our behavior and its impact.

**Theory** -- From the fields of organization development, ascetical and pastoral theology, and ecclesiology.

Just as in parish interventions. Working groups don't have time to do it all. The process of deciding what to focus on, and how to use time -- is itself an important skill for a practitioner. The work of trying to become aware of a number of dynamics that are all going on in any congregational development intervention may help participants have a closer to "real life" experience.

During at least one cycle the participants will engage local parishes as part of the learning process on organizational culture.

### **2. Working with models and theory**

Participants need to learn the theories and models that inform organizational improvement work. A grasp of theory is a significant tool in broadening our choices as leaders and consultants.

### **3. Designing, Implementing and Reflecting on Back-Home Interventions**

There are three rounds of designing and implementing back-home interventions; with disciplined reflection after the first two. Our assumption is that the ability to shape effective interventions is an essential competency in congregational development and organization development. We are operating on the assumption that the practitioner only really begins to understand the organization in the action-research process -- when we see how people respond to an intervention we learn more about the organization's values, dynamics, and culture.

### **4. Using a Learning–Application Team**

The team is a self-selected group of participants. Contact may be face-to-face or is by e-mail and phone if people live too far from one another. The two primary purposes of the team are to offer critique of the back-home interventions and to learn from each other's work. A broader purpose in team-work is to reinforce the practitioner's capacity for openness and collaboration in ministry.

### **5. Participation in the Learning Community**

Full participation in the worship, social gatherings and work of the community.

# THE CHURCH DEVELOPMENT INSTITUTE (CDI)

## ***The CDI Trainers Core Comprehensive Program in Congregational Development www.CDITrainers.org***

The primary work of the CDI Trainers is to make it possible for dioceses to conduct this comprehensive congregational development training in the diocese or region. CDI Trainers also sponsors the national, open CDI at Deer Isle, Maine.

The program you are participating in may be a Church Development Institute in a diocese or a national CDI. All these programs have the same purpose, tasks, approach, and orientation. They may be offered with differing schedules but the same number of workshop hours. The national CDI is more experiential than the others.

### **OUR PURPOSE**

CDI is a leadership-training program focused on the ministry of developing the community and organizational life of congregations. To increase the parish's ability for Christian formation. We equip leaders to serve in the congregation, in the diocese, and as consultants.

### **OVERVIEW**

An overview of the competencies needed for effective organization development in religious systems includes four elements. CDI is concerned with all four and recommends supplemental and advanced work in each.

- |                                    |  |
|------------------------------------|--|
| 1. Self-awareness                  | This includes an awareness of: the impact of their behavior on others, their communication styles, how they deal with differences and resistance, openness, authenticity, etc. |
| 2. Theory                          | Practitioners need a theory base in group development, systems, interventions, etc.  |
| 3. Methods - Structured Activities | Small & large group processes; instrumentation; survey feedback, etc.  |
| 4. Skills                          | The ability to give & receive feedback; group facilitation skills; design skills, observing, listening, presentation skills, etc.  |

Making effective interventions is a complex process involving organizational purposes and needs, the organization's culture, and the competencies and values of leaders and consultants. The practitioner's awareness of the intervention possibilities is dependent on the depth and broadness of her or his competency.



## **TOPICS INCLUDE**

Shaping parish life to enable effective Christian formation, learning to develop an overall strategy for development in congregations; creating development projects; grounding strategy in the unique purpose, identity and dynamics of the church and sound organizational development. Using peers as a support and resource. Learning to use four core frameworks in congregational development.

Issues of organizational culture (the congregation, Anglican, worship), values-centered organizations, Benedictine spirituality, defining and marketing the congregation, strategies for growth and evangelization, size issues and dynamics, organizational life cycle, understanding the congregation as a system.

Pastoral oversight, self-differentiated leadership, personality type and leadership, roles from which organization development efforts are initiated, strategic management, increasing participation and shared leadership, dynamics of change, organizational improvement process (a process of planned change), the relationship cycle in organizations.

Contextual issues (values groupings, a fragmented world, assessing the impact on a congregation), responding to a changing context, trust development and conflict management, the role of the diocese in congregational development.

## **OUR APPROACH**

**Practical** -- Designed to provide skills and methods, grounded in successful congregational development efforts

**Grounded in Anglican Spirituality and Identity** -- Focuses on the spirituality of the community, its character and culture; on the spirituality of leaders and its effect on the church community; and on models for development rooted in Anglican tradition. Includes the Eucharist and Daily Office in its community life.

**Innovative** -- Draws on the emerging methods used in non-profit, corporate, and church organizations.

**Competency Oriented** -- Equips leaders of congregations of all sizes with the resources they need. Our desired outcome is competent leadership on the part of parish and diocesan staff and consultants that is rooted in the experience, research, and methods of congregational and organization development.

**Community Centered** -- We come together as a learning community. We share responsibility for our learning and community life. We strive for an open, non-defensive climate in which there is an ability to give and receive supportive and challenging feedback.

## **ORIENTATION**

1. We believe that congregations of all sizes can live a full Christian life. The task is to create a fit between their size, resources, and vision for ministry.
2. We believe that the congregation is a local expression of the Body of Christ, the People of God. The task is to build the congregation's life and future on a deep appreciation of its distinctive qualities and strengths.
3. We believe that congregational development involves our striving as a community of faith, toward God. It is not primarily something we do, or create, or make happen. It is more the way in which a congregation shares in the Divine Life; enters into and reflects the unity, holiness, catholicity and apostolicity of the Church. It is living the Christian life, not simply as individuals, but as a people. The task is for the congregation to discern and act on the Spirit's movement in its life.
4. We believe that there is much to learn and use from the research and experimentation of secular organizations. The task is to appropriately adapt those resources to the Church's nature and mission.
5. We believe that the relationship between congregations and the diocese is important in the work of congregational development. The task is to build a higher level of trust

between congregations and dioceses and to help dioceses better organize themselves to enable congregational development.

6. We believe that it is through the diocese that most congregations can best be resourced for their congregational development efforts; not through national programs providing expert advice. The task is to build the capacity of dioceses for this ministry; to establish a significant number of skilled leaders, consultants and strategists in the diocese who are supported by a broader network of prayer, coaching, training, research and learning.

### **WHAT MAKES THIS PROGRAM DIFFERENT FROM OTHER PROGRAMS**

The program offers a comprehensive, core program in congregational development that stands out from other such programs in the following ways:

- Experience and Size – The partnership is the largest and most experienced program in congregational development.
- Practical and Competency Oriented – The training staff has significant experience in the parish and diocese.
- Grounded in Anglican Spirituality and Identity – Issues of the corporate spirituality of a congregation and the spiritual formation of individuals are at the center of the course.
- Innovative – Draws on emerging methods used in non-profit, corporate and church organizations.
- Values and Addresses the Needs of All Parish Sizes and Various Contexts – Participants have come from all sizes of congregations and have expressed satisfaction with the help they received. The course assumes that congregations of any size can live a full Christian life. Participants in the national CDI have come from urban, suburban and town settings; from the South, West, Midwest, East and overseas. They have reported a high level of satisfaction with how the program has served them in their various communities.
- Values the Role of the Diocese - We believe that the relationship between congregations and the diocese is important in the work of congregational development. The task is to build a higher level of trust between congregations and dioceses and to help dioceses better organize themselves to enable congregational development. It is through the diocese that most congregations can best be resourced for their congregational development efforts; not through national programs providing expert advice. The task is to build the capacity of dioceses for this ministry; to establish a significant number of skilled leaders, consultants and strategists in the diocese who are supported by a broader network of prayer, coaching, training, research and learning.

### **HISTORY**

The work of the course is grounded in the disciplines of pastoral theology, ecclesiology, congregational studies, organizational behavior and development, and leadership studies.

Bob Gallagher developed the program in 1978 for the Diocese of Pennsylvania as a two-year training program for parish development consultants. The program was expanded in 1981 as a two-year parish leadership-training program in the Diocese of Connecticut. In 1985 the Church Development Institute at General Theological Seminary was launched and the program was repackaged as a three-phase program.

Phase 1 - Two weeks of workshops (55 hours), participation in building a learning community, worship and social time.

Phase 2 - Reading in the field

- Congregational development projects and reports

- Work with a Learning-Application Team

Phase 3 - Two weeks of workshops (55 hours), participation in building a learning community, worship and social time.

From 1985 - 1995 the Institute was cosponsored by GTS and the Order of the Ascension.

In 1992, a variety of one-week workshops were added and offered in the weeks prior to the Institute. In 1995 Peggy and Dennis Campbell began a second CDI at the School of

Theology, University of the South. A partnership was established between the centers that has consisted of meetings in which coordinators of the programs share collaborate on program design and advertising. In 1999 CDI Trainers was established to oversee the development and implementation of diocesan CDI's. In 2000 CDI left GTS and became CDI-NYC, then CDI-Deer Isle and currently CDI – Seattle.

CDI is now or has been offered in the dioceses of Milwaukee, Colorado, Atlanta, Washington, Rochester, Newark, Western New York, Western Massachusetts, Virginia, Connecticut, North Carolina, and Southwest Virginia.

In 2007 LTI (Leadership Training Institute) merged into CDI Trainers. This broadened the range of offerings to include workshops in human interaction, group development, conflict management, consultation skills, and design skills.

## PROGRAM CERTIFICATES

**Certificate for The Institute:** You will receive a certificate if you participate in all sessions and most worship; complete all assigned readings, participate in your Learning-Application Team; design and complete congregational development projects and reports.

### **Advanced Certificate Programs**

Advanced certificate programs are available in:

1. Congregational Development Consulting
2. Congregational Development Leadership

### **Advanced Programs Include:**

1. INSTITUTE - Receiving a certificate from a national or diocesan CDI
2. WORKSHOPS - 4 weeks including a Group Development Lab (and a Consultation Skills Lab, if in that certificate program)
3. READINGS
4. WORK WITH A MENTOR - to reflect on your practice
5. SELF ASSESSMENT & FEEDBACK PROCESS
6. DETAILED REVIEW OF TWO PROJECTS

## REQUEST FOR A CERTIFICATE

**I am requesting a certificate for completing the Institute program.**

This form is turned in when the participant can affirm all the statements.

\_\_\_ I have completed all workshop sessions (110 hours) and participated in most of the community's worship

\_\_\_ I have completed all the required readings

\_\_\_ I have fully participated in a Learning-Application Team

\_\_\_ I have completed the required congregational development projects

\_\_\_ I have completed all Congregational Development Project Reports

\_\_\_ Overall I believe that I have worked within the program's learning agreement

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Date \_\_\_\_\_

### Arrangements about making up incomplete aspects of the program --

1. Required readings must be completed no more than four months after completing the workshop session requirements. This form may be sent to CDI when the readings have been done.
2. Permission may be given to substitute a limited number of workshop hours by attending the same sessions in another CDI, a special consulting contract with a CDI graduate, or some other activity. The time commitment and quality of the learning process must meet CDI standards. The additional costs involved are covered by the participant.
3. Any plans for making up work that require significant additional CDI staff time will be billed as a private consultation.

# Required Reading List (as of 1-25-08)

## Church Development Institute

**Please note: this list is changed from time to time. When that happens a CDI participant may decide for that cycle to stay with the reading list he or she started with or may move to the new reading list.**

**Before requesting a certificate for program completion you need to have read the following.**

1. All material in the participant manual; all handouts provided as part of the program. Complete readings as assigned for particular session. Any readings not specifically assigned are to be completed by the end of the cycle. **Please bring your manual to all sessions.**
2. Fill All Things: The Dynamics of Spirituality in the Parish Church, Robert A. Gallagher, Ascension Press, **2008 [until the book is in print PDF copies are made available to participants]**
3. The Hope of Glory: Congregational Options, Robert A. Gallagher, Ascension Press **[until the book is in print PDF copies are made available to participants]**
4. Introduction to Type in Organizations, S. Krebs Hirsh & J. Kummerow, Consulting Psychologist Press (CPP). **Please bring to sessions on Type**
5. The Character of Organizations, William Bridges, CPP, 1992. --- Focus on pp. 1-31 and 69-107; Use the Index pp. 129 - 138 and the descriptions pp.33-67 to identify your congregation's type.
6. In the Grip: Understanding Type, Stress and the Inferior Function Naomi L. Quenk, CPP. **Please bring to sessions on Type**
7. Seeking God: The Way of St. Benedict, Esther de Wall, Liturgical Press. -- Read chapters 2-5
8. Organization Development & Change, Thomas Cummings and Christopher Worley, South-Western College Publishing, Cincinnati, any edition after 1997 Focus on sections: General Introduction to OD, The Process of OD, "Diagnosing Organizations", "Collecting and Analyzing Diagnostic Information", and "Feeding Back Diagnostic Information". These are chapters 5, 7, and 8 in the 6th edition. And any other 100 pages as assigned and as you are interested in reading.
9. The Corporate Culture, Edgar Schein, Jossey - Bass, San Francisco, 1999
10. Reaching Out Without Dumbing Down, Marva Dawn, Eerdmans Grand Rapids, 1995.
11. Congregational Leadership in Anxious Times, Alban, 2006, Peter L. Steike

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### About ordering books

For Ascension Press material contact [secretary@arkansasusa.com](mailto:secretary@arkansasusa.com). or call 479-442-7373

For Consulting Psychologist Press (CPP) material. Order from CCP, 3803 East Bayshore Road, P.O. Box 10096, Palo Alto, CA 94303. 1-800-624-1765 or on the web at <http://www.cpp.com> [Includes -- "Introduction to Type in Organizations"; "In the Grip"; "The Character of Organizations"]

Other books including "Organization Development & Change", Thomas Cummings and Christopher Worley <http://www.amazon.com> or your bookstore.

## Learning-Application Teams

Teams are self-selected from among participants. The size needs to allow both adequate air-time for each participant and enough people to maintain energy, creativity and interest. Teams need to include people from more than one parish, there needs to be some "mix" for effective learning. Teams are not the place to accomplish detailed planning about a particular parish groups' back home project.

Meetings may be face-to-face, e-mail, phone conference calls. The team functions for a designated period of time (e.g., in the summer CDI's it exists during the time between summers).

### **Objectives of the team:**

1. To reflect on all the congregational development projects of team participants. To provide critical and supportive feedback in the designing process and to reports.
2. As appropriate to the meeting arrangement, use the program's approach to teamwork, e.g., facilitator, collaboration, use of newsprint, decision-making methods, etc.
3. If contract for by participants - Discuss readings with each other.

### **Specific Tasks:**

1. Arrange a meeting schedule.
2. Decide on who will facilitate each meeting.
3. Decide on a team coordinator -- primary role is to call the team back together if there is a break in the meeting schedule.
4. Decide on a target date to make your first congregational development report to the team. Give special attention to "Results" and "Learnings".
5. Teams may contract to continue beyond the program.

## Congregational Development Projects

There are three projects and two reports you need to make.

### Project and Report One

1. The action plan for this project is developed during workshop time. You may decide to revise it in the following weeks.
2. A report is due to your L-A Team by a time agreed on by the team but no later than as required by the training staff. Send a copy to the training staff person for your L-A Team. They are likely to respond only if there is a concern about your report.
3. It is up to the team to decide on reporting details -- e-mailed, faxed or mailed in advance; copies brought to a team meeting; or the report to be put on newsprint. In any case the standard format in the manual is to be used. This means that the first project is to be completed by the time of this report. Reports include the "Learnings and Results" section.

Therefore, this project needs to be something that can be accomplished in a relatively short time period. It may stand on its own or be part one of a longer-term project.

### Project and Report Two

1. This project is planned either as a "stand alone" project, unrelated to your first project or it may be "part two" of the earlier project. You plan this on your own. *It is not done during workshop time.*
2. The report is due to your L-A Team by a time agreed on by the team but no later than as required by the training staff.
3. This report is sent to your L-A Team and the assigned member of your CDI training staff. Reports will be reviewed, commented on, and returned. If reports are not received you should not come the next session.

### Project Three (with or without Report)

You will prepare this project toward the end of your second summer if you are in national CDI, and in during your second year if you are in a diocesan program. You can make an appropriate contract with your L-A Team to reflect with you on the project.

## Criteria for Projects

- 1. It is Congregational Development or Organization Development** -- Review the definitions, strategies and methods of CD/OD to see that the project fits.
- 2. Strategic** -- The project is clearly directed at the long term, systemic development of the parish (or diocese, etc.). It builds the capacity of the organization: for carrying out its primary task, and/or for self-renewal and renegotiations, and/or for solving problems and acting on opportunities.

**3. Parish Development/Organization Development Theory** -- The project has a clear base in parish development/organization development theory/knowledge/research. One way to be certain about this is to begin with something from a theory, e.g., a long-term goal of "improving the congregation's Renewal-Apostolate Cycle". Then you build specific projects and goals around that long-term vision.

**4. Manageable** -- The project can be done within the time assigned (for Project and Report One, Project and Report Two). It fits the readiness of the organization.

**5. Measurable** -- You know if it has been done or not.

**6. Understandable** -- The project needs to be easily understood by those that play key roles in its implementation.



## Time Line for CDI's

Congregational Development Project Reports and Learning-Application Teams

***There are three projects and two reports you need to make during CDI. The training staff of a CDI may modify these dates.***

### ***When the CDI cycle begins in the fall***

#### **Project One & Report One –**

During CDI	The action plan for this project is developed during workshop time. Usually during the fourth weekend. You may decide to revise it in the following weeks.
Summer & fall	Implement Project
By November 1	CD Project Report is due (including the Results & Learnings sections) -A report is due from each individual to his or her L-A Team and to the trainers. -Send by e-mail or e-mail attachment
By November 15	Members of the L-A Team give feedback to each person on the team. This is usually at a meeting of the L-A team. Trainers will not offer feedback unless there is a specific reason to do so.

#### **Project Two & Report Two**

By January 15	Send to the L-A Team the action plan for your second project. Use the format provided in the manual.
By February 1	Feedback from members of the L-A Team on the action plan. The team meets around this time and goes through the CD Project Critique process.
February - April	Implement Project
April 20	CD Project Report is due (including the results and learnings sections) -A report is due from each individual to his or her L-A Team and to the trainers. -Send by e-mail or e-mail attachment -All respond with comments and feedback to the reports.

#### **Project Three (with or without Report)**

You will prepare this project during the fourth weekend of your second year. You can make an appropriate contact with your L-A Team to reflect with you on the project if you want.

## ***When the CDI cycle begins at the beginning of the year***

### **Project One & Report One –**

During CDI	The action plan for this project is developed during workshop time. Usually during the forth weekend. You may decide to revise it in the following weeks.
In the following 2 – 3 months	Implement Project
By April 1	CD Project Report is due (including the Results & Learnings sections) -A report is due from each individual to his or her L-A Team and to the trainers. -Send by e-mail or e-mail attachment
By April 15	Members of the L-A Team give feedback to each person on the team. This is usually at a meeting of the L-A team. Trainers will not offer feedback unless there is a specific reason to do so.

### **Project Two & Report Two**

By June 1	Send to the L-A Team the action plan for your second project. Use the format provided in the manual.
By June 15	Feedback from members of the L-A Team on the action plan. The team meets around this time and goes through the CD Project Critique process.
Next 3 – 4 months	Implement Project
Before the forth weekend	CD Project Report is due (including the results and learnings sections) -A report is due from each individual to his or her L-A Team and to the trainers. -Send by e-mail or e-mail attachment -All respond with comments and feedback to the reports.

### **Project Three (with or without Report)**

You will prepare this project during the forth weekend of your second year. You can make an appropriate contact with your L-A Team to reflect with you on the project if you want.

## Time Line for CDI-Seattle

Congregational Development Project Reports and Learning-Application Teams

***There are three projects and two reports you need to make during CDI.***

### **Project One & Report One**

- |                |  |
|----------------|--|
| During CDI     | The action plan for this project is developed during workshop time. You may decide to revise it in the following weeks.  |
| Summer & fall  | Implement Project  |
| By November 1  | CD Project Report is due (including the Results & Learnings sections)<br>-A report is due from each individual to his or her L-A Team and to the trainers.<br>-Send by e-mail or e-mail attachment |
| By November 15 | Members of the L-A Team give feedback to each person on the team. Trainers will not offer feedback unless there is a specific reason to do so.   |

### **Project Two & Report Two**

- |                  |   |
|------------------|---|
| By January 15    | Send to the L-A Team the action plan for your second project. Use the format provided in the manual.  |
| By February 1    | Feedback from members of the L-A Team on the action plan.   |
| February - April | Implement Project   |
| April 20         | CD Project Report is due (including the results and learnings sections)<br>-A report is due from each individual to his or her L-A Team and to the trainers.<br>-Send by e-mail or e-mail attachment<br>-All respond with comments and feedback to the reports. |

### **Project Three (with or without Report)**

You will prepare this project toward the end of your second summer in national CDI.. You can make an appropriate contact with your L-A Team to reflect with you on the project if you want.

**Report 1** – Due \_\_\_\_\_  
To your L-A Team and CDI trainers

**Report 2** – Due by \_\_\_\_\_  
To your L-A Team and CDI trainers

- Send by e-mail or e-mail attachment
- Response from L-A Team -- Within two weeks.

## Congregational Development Project Report

YOUR NAME

E-MAIL

### ACTION PLANNING

1. Project Deadline (November 1 or April 20 or as required by your CDI training staff)

2. Project Goal (something that can be done by the Project Deadline)

3. Identify the longer-term development goal(s) to which the project is related

4. Theoretical base and strategic assumptions for the project

a. Theoretical Base (a theory from CD/OD that provides a rationale for your project)

b. Strategic Assumptions

## 5. Action Plan

- a. What are the major steps you need to take to implement the project?
  
  
  
  
  
  
  
  
  
  
- b. What will the project require of you as a leader and a person?

## LEARNINGS & RESULTS

1. Results (in terms of the project goal and longer-term development goals)
  
  
  
  
  
  
  
  
  
  
2. What did you learn about congregational development?
  
  
  
  
  
  
  
  
  
  
3. What did you learn about yourself?

## Critique of Proposed Congregational Development Projects in the Learning – Application Team

### **TASK:**

1. Select a facilitator -- while you may want to rotate the role, use your best facilitators
2. Decide on your time use.
3. Team member presents a proposed project - On newsprint. Use the format for *CD Project Reports*
4. Team is to critique the proposed project using the following:
  - a. Is it Congregational Development/Organization Development?
    - Does it clearly advance a CD/OD objective as seen in the CD definition in the manual?
    - Does it show the use of CD strategy (see manual)?
    - Can you see the use of (from the manual):
      - In Cycle One -- *Intervention Choices and Trust Development in Organizations*
      - In Cycle Two -- *An Intervention Theory and the Process of Planned Change*
  - b. Does the project "hang together"?
    - Is it easily understood?
    - Is the "deadline" date correct? (Fits program norms)
    - Is the project "doable" by the deadline date?
    - Is the organization "ready" for this project?
  - c. What results are expected? Are they clearly stated?
5. Stance during the critique:
  - For Presenter -- listen, note comments that might help you create a stronger project
  - For Team Members -- remember, this is not your parish/situation; avoid getting dogmatic about what needs to be done in another's congregation; also avoid disengaging -- offer your best thinking, intuition, etc. Practice "engaged-detachment".
6. At end of discussion – The presenter summarizes what she or he heard; note what you liked about the critique, ideas that you will consider

## Worship as Part of the Program: Style and Rationale

**A. Worship in this program serves some of the same purposes as all worship.** We gather to glorify God and to participate in the life of God; to see a glimpse of the patterns and dynamics of Reality so we might recognize and participate in them in all of life; to shape our common life; to, in Underhill's words, be "conformed to the pattern of Jesus, given in its wholeness to God, laid on his altar as a sacrifice of love, and consecrated, transformed by his impouring life, to be used to give life and food to other souls."

**B. Our worship also has a purpose broadly related to our learning task.** We want to engage worship in a manner that serves its usual purposes while also drawing our attention to the issues of how patterns of worship shape a faith community. The assumption here is that we are creating and maintaining the organizational culture of a congregation by the architecture, art, use of space, style, approach to coaching and training people for skillful participation, etc.

So we will worship in a space that requires us to both use its "givenness" and also to intentionally create a climate. Coaching, leading and training will be obvious and directed toward the shaping of a common life (a common culture) for this particular community, for our time together.

Worship is part of a community's culture and participates in the standard issues of organizational culture, e.g., defining boundaries, influence, intimacy, rewards and especially the building of common language/life and coping with mystery and myth.

**C. The style of worship at might be described as:**

- **Anglican** in its use of resources and living of the Benedictine pattern of prayer
- **Inclusive** language and BCP, Rite 2
- Requiring a level of **community skill and discipline** (e.g., in stillness and silence, in the psalms, in full participation, etc.)
- **Participatory** in the usual ways but also in a shared homily in the Eucharist
- **Sensuous** in its attention to color, light, candles, incense, etc.
- **A bit contemplative** in its stillness, silence and reflective style of doing the psalms (Note on the psalms: We use the recommendations in the BCP for use of the psalms in the Daily Office, i.e., antiphonal recitation, verse by verse alternation between sides; and in making a distinct pause at the asterisk, p. 582 - 583.)

**D.** It is our hope that you will give yourself to this pattern of worship while with us. That you will allow yourself to experience it.

**E.** We also hope that your reflections on our worship are less around the particulars of this style and pattern, but more on the general issue of the relationship of the shaping and building of community with any pattern and style of worship. The task is not to take this style back home but to better see our leadership role in relationship to the shaping of worship and community.

# A LEARNING AGREEMENT

The Church Development Institute

**CDI agrees** to provide the Church Development Institute program as described on the web site and in this manual.

Our educational method includes:

1. Linking theory and practice. We make use of experiential education methods. Participants are helped to learn from their experience in working groups and as congregational development practitioners. We engage in disciplined reflection on our experience and relate that to theory and research.
2. Active adult participation of all involved
3. CDI trainers serving as managers, coaches, facilitators, and presenters in the learning process
4. Shared responsibility for the learning process
5. Feedback as part of the learning process, including critique of the Congregational Development Project Reports by other participants and trainers, assessments of the program, and feedback on participant and leadership skills.
6. Creating a learning community of congregational development practitioners
7. Maintaining CDI standards
8. A focus on organizational and system issues. Intra-personal, interpersonal, group, and spiritual life issues are important elements in effective congregational development, and are included in the program. For participants with less skill in those areas, and for anyone considering becoming a consultant – what we do in CDI does not provide enough work in those areas. Participants may want to consider additional work.
9. Participants are asked to try to use the knowledge and skills provided, "as given". This is to give ideas and methods that may be new to the participant a "fair chance" before evaluating and modifying them when back home.
10. Participants are asked to "resource" themselves as needed with mentors, spiritual direction, and/or therapy.

## **The participant agrees:**

1. I have looked at the program description on the web site.
2. I am willing to fully cooperate with the learning approach offered by CDI
3. The program appears to address my current learning objectives.
4. I will make the program a priority for my continuing education.
5. I am making a commitment to fully participate in the program, including participating in all sessions (about 110 hours), the community's worship and social life, completing the required readings, participating in a "back-home" Learning-Application Team, engaging in designing and implementing congregational development projects, and completing required Congregational Development Project Reports.
6. If I miss sessions for any reason including family emergencies or illness. I will make up the sessions in a manner approved by the program leaders. I understand that if too many sessions are missed I may need to drop from the program (and begin over again.)
7. I will work in a collaborative manner with other leaders in my organization as I apply what I am learning in CDI.

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

This is to be turned in on the first day of the program.



# Learning from Experience

It is a core assumption of lab training that we do not learn from experience itself; we learn from disciplined reflection on experience. The learning process is really one of learning about our experience from a structured reflection on our experience. The method offered here is called --- E - I - A - G.

E – Experience

I – Identify

A – Analyze

G – Generalize

This has been a core learning method in lab training. With adaptation in has been used in team development and Organization Development efforts.

**Experience** – This is anything that happens in the group. The behavior of the group or people within the group becomes the starting place for learning.

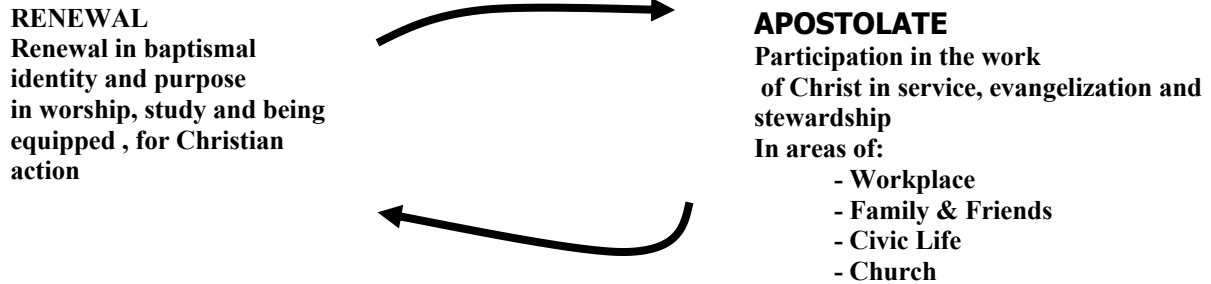
**Identify** – A specific behavior or pattern of behaviors is selected as a starting point. The group needs to identify what happen, when it happen, etc. The objective is for all the group members to adequately recall the experience so they can all contribute to the learning process. The assumption is that everyone may be able to learn from the experience.

**Analyze** – The group explores and examines the experience that has been identified. The group may look at the impact or effect of the behavior(s); sharing how they felt, what they thought, how they acted, etc. Judgments each person made may be shared – was the behavior helpful or hindering to the group’s life and work? Analysis may include relating the experience to some theory, model or research?

**Generalize** – This is an opportunity for group members to state what they have learned; to generalize what has been learned into other situations. Based on the analysis, the members state what they might do in a similar situation, what they might have done differently in this situation, what conclusions they have drawn, etc. Members will not necessarily share the same learnings. In lab training two norms are useful in the “Generalization” discussion. First – Each person has his or her own learning. That learning has its own validity. It doesn’t need to be shared by others to be legitimate. Second – It is acceptable for members to ask each other for information about the basis for stated learnings or generalizations.

# The Renewal – Apostolate Cycle: A Diagram Overview

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.



## 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, 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.

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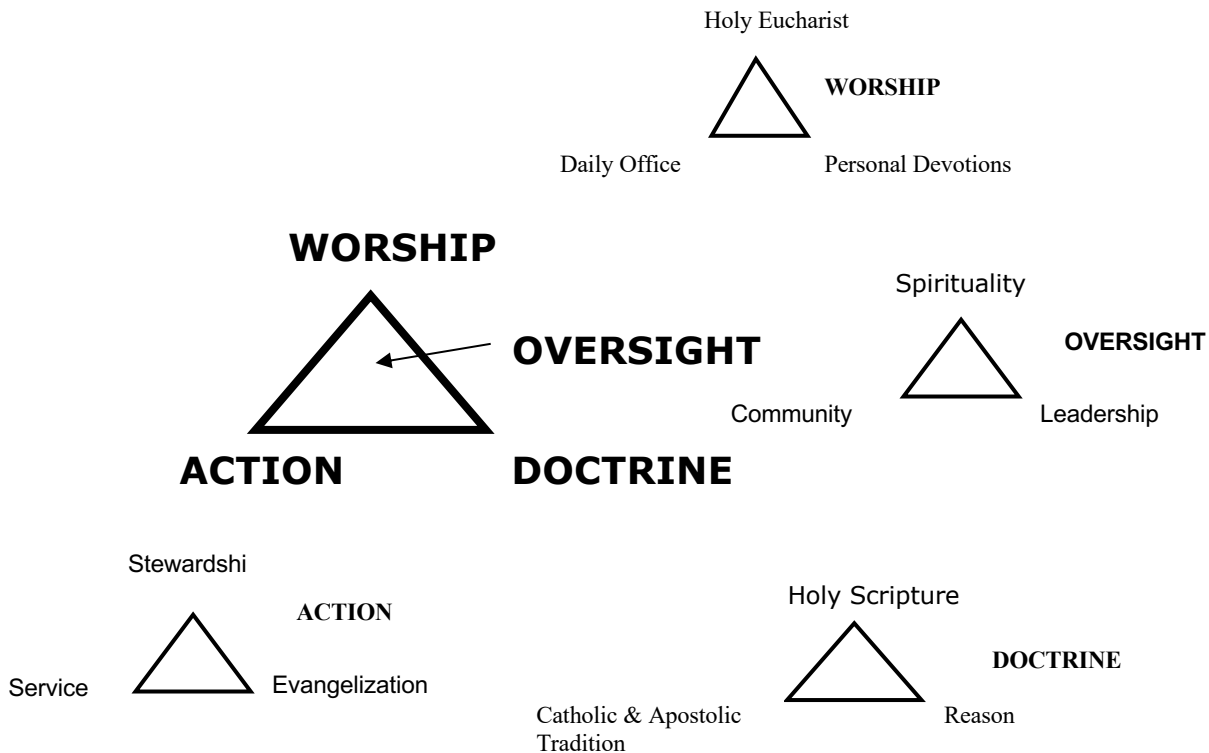
For more on the model see Robert Gallagher's *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Ascension Press

# The Christian Life Model: A Diagram Overview

*In a world where carpenters get resurrected, everything is possible.*

Eleanor in *The Lion in Winter*

For many years Mother Mary Laney was vicar of Saint Gabriel’s Church in the Olney neighborhood of Philadelphia. Olney is a community of African Americans, Asians, Arabs, Africans, Hispanics, and some whites, the remains of a once large German American population. It’s one of the most diverse communities in Philadelphia. It’s also a community struggling with crime, affordable housing, and employment. It was a small parish dependent on the diocese for assistance, serving the Olney community with efforts of community organizing, employment and education, and holding together a diverse membership. Saint Gabriel’s had a motto “With God all things are possible”. What held them together and allowed them to move forward in service? Liturgy and prayer were certainly at the heart of it. Another one of the tools Mary Laney used was this Christian Life Model. It offered a way of thinking about the elements and dynamics of life in a Christian community.



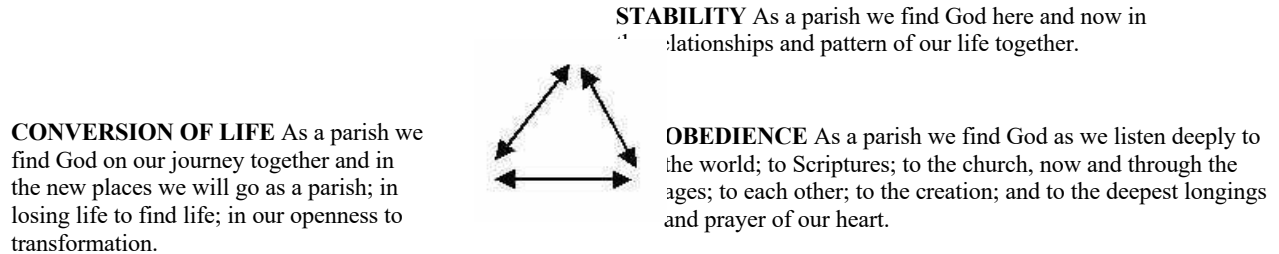
- Each element is a way in which Christ comes to us and in which we seek Christ. Each is an entry into, and participation in, the unity to which we are called. In them we are called into a deeper relationship with Jesus Christ - the heart of Christ, the mind of Christ, the work of Christ.
- The model can be used by parishes for self assessment, as a framework for planning, as a way to focus the parish on the essentials of the Christian life, and as a resource to individuals in shaping a Rule of Life. Each triangle is a system of mutual influence in which the elements strengthen and impact the other elements.

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

# The Benedictine Promise: A Diagram 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.



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.

## Looking 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, too little listening, or a facade of listening?

## Developing a parish culture that is marked by:

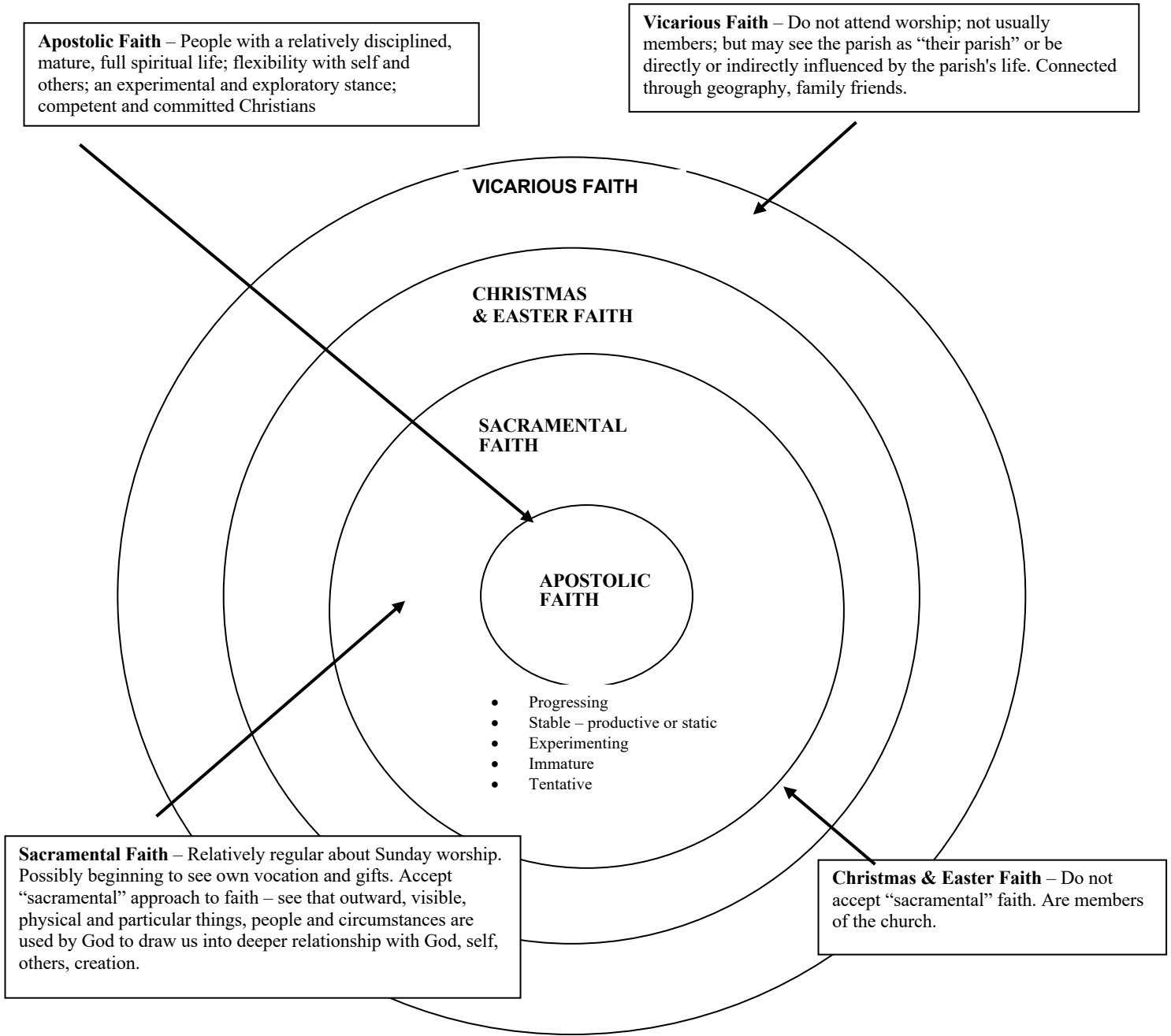
**Stability** – Especially seen in Liturgy, prayer and relationships.

**Obedience** – Seen in our openness to listen, 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.

# The Shape of the Parish: A Diagram Overview



The model can be used:

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

Copyright "Shape of the Parish" Diagram -- Robert A. Gallagher/Mary Anne Mann, 1983; Revised RAG 1999, 2003 For more on the model see Robert Gallagher's *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Ascension Press.

# ON THE USE OF CORE FRAMEWORKS

1. Each framework assumes that those responsible for oversight can act to set the climate, structures, and processes necessary for a faithful and effective parish life and ministry. Capture the environment! Focus on the parish as an expression of the Body of Christ, a system. The parish then provides the opportunity for individuals to engage their own responsibility for spiritual development. There is no assumption that every individual will become engaged.
2. Frameworks help keep the leader's perspective comprehensive and rooted.
  - a. Frameworks both oversimplify the "reality" and help us stay aware of complexity. While simplifying they are still offer a more complex view than a parish normally uses in its discernment, assessing and setting direction.
  - b. Frameworks help us to not set one part of faith and practice against another, e.g. service-evangelization; community life - management.
  - c. Frameworks may help harmonize/integrate/sort through two lines of thought we hold that would appear to contradict each other (in the way we use them) e.g., importance of daily office - informal personal devotions; parish increase "lay ministry" during vacancy - ordained clergy as "empowerers" of lay ministry.
  - d. Frameworks may help leaders not get distracted from pursuing the primary task
    - by fads
    - by the tug of the parish's old and familiar pattern
    - by getting "hooked" trying to change people, especially the "old leadership"
    - by seeking a "quick fix"
3. In practice
  - a. Share frameworks with appropriate people. Broaden the base of those "carrying" the conceptual logic.
    - Christian Life, Benedictine Promise and the Renewal-Apostolate Cycle can be shared (in some manner) with the whole parish.
    - Shape of the Parish -- need to take care; watch tendency to "label" people. Requires a certain degree of spiritual maturity to hear and use.
  - b. Will create some tension in people. They may be a challenge to some people. We need to take care to not disown the framework because of the tension and to not force it upon a particular person. We can allow the tension to continue in the person(s) in a climate of acceptance. Such tension is often necessary as people mature in faith and practice.
  - c. Use the Christian Life Model.
    - In general education of adults and children to provide conceptual tool for Christian life.
    - As an outline for shaping a rule of life.
    - In doing parish and clergy assessments.
    - As an outline for a parish plan.

# What is OD?

## Standard Definitions of Organization Development

### Two Early Definitions

"Organization Development is an effort planned, organization-wide, and managed from the top, to increase organization effectiveness and health through planned interventions in the organization's 'processes,' using behavioral-science knowledge." Richard Beckhard, "Organization Development: Strategies and Models", 1969

"Organization Development is a response to change, a complex educational strategy intended to change the beliefs, attitudes, values, and structures of organizations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself." - Warren Bennis, 1969

### More Recent Definitions of OD

"Organization Development is the attempt to influence the members of an organization to expand their candidness with each other about their views of the organization and their experience in it, and to take greater responsibility for their own actions as organization members. The assumption behind OD is that when people pursue both of these objectives simultaneously, they are likely to discover new ways of working together that they experience as more effective for achieving their own and their shared (organizational) goals. And that when this does not happen, such activity helps them to understand why and to make meaningful choices about what to do in light of this understanding." - Neilsen, "Becoming an OD Practitioner", Englewood Cliffs, CA: Prentice-Hall, 1984, pp. 2-3.

"Organization Development is a top-management-supported, long-range effort to improve an organization's problem-solving and renewal process, particularly through a more effective and collaborative diagnosis and management of organization culture-with special emphasis on formal work team, temporary team, and inter-group culture- with the assistance of a consultant-facilitator and the use of theory and technology of applied behavioral science, including Action Research." - French & Bell 1990

"Organization development is a system-wide application of behavioral science knowledge to the planned development and reinforcement of organizational strategies, structures, and processes for improving an organization's effectiveness." - Cummings and Worley, "Organization Development and Change", 1997

"Organization Development has been defined as a series of planned processes by which human resources are identified, utilized, and developed in ways that strengthen organizational effectiveness by increasing problem solving capabilities and planning" - From The Organization Development Institute web site

"Organization Development (OD) is the process of improving organizations. The process is carefully planned and implemented to benefit the organization, its employees and its stakeholders. The client organization may be an entire company, public agency, non-profit organization, volunteer group - or a smaller part of a larger organization.

The change process supports improvement of the organization or group as a whole. The client and consultant work together to gather data, define issues and determine a suitable course of action. The organization is assessed to create an understanding of the current situation and to identify opportunities for change that will meet business objectives.

OD differs from traditional consulting because client involvement is encouraged throughout the entire process. The ways in which people communicate and work together are addressed concurrently with technical or procedural issues that need resolution". - Chicago OD Network web site

Organization Development (OD) is an effort to increase an organization's ability to improve itself as a humane and effective system. Elements of OD may include:

1. Finding ways to adapt to the changing context while maintaining and enhancing the organization's integrity and internal integration.

2. Establishing structures, processes and a climate that allow it to effectively manage its important and pressing business (e.g. projects, problems, crises, etc.) while giving adequate attention to strategic issues (e.g., long term development and renewal, planning and envisioning, engaging new opportunities, crisis prevention, etc.)

3. Increasing the ability to engage formation issues such as:

- vision including the defining of identity, purpose, values, organizational culture and related programs and activities.
- attracting new people (as staff and/or members) who support the vision
- increased competence and commitment
- creating an alignment, an adequate "fit" among the various aspects of the organization's life, e.g.
  - various sub-systems (people, structure, strategy, processes, etc.)
  - vision & resources of leadership, energy and funds
  - income & expenses
  - physical facilities & program needs and possibilities
- establishing relationships with external "public" or constituencies that have a stake in the organization.

4. Increasing its ability to adapt to new conditions, solve problems and learn from experience. A capacity for self-renewal. OD does involve problem solving, but its most significant contribution to an organization is in creating an culture that focuses on the continuous growth and vitalization of the system. OD is a normal and vital part of a healthy organization. - Robert A. Gallagher, 1997



## From: What are the basic values of OD?

- by Allan H. Church & W. Warner Burke, 1993 They surveyed 1,000 OD practitioners regarding the values in the field, using names randomly selected from two professional associations (The OD Network and The American Society for Training and Development -- OD division). They achieved a response rate of about 29%.

The five most important values that currently drive work in the field of OD today:

1. Increasing effectiveness and efficiency
2. Creating openness in communication
3. Empowering employees to act
4. Enhancing productivity
5. Promoting organizational participation

The results of our survey confirmed empirically what many authors in the field have already suggested; that is, that there are only two primary value constructs underlying practitioners' work with organizations in the OD field. These are (1) fostering humanistic concerns--such as empowering managers and enhancing quality of worklife--and (2) focusing on the more traditional business needs and measures, including increased effectiveness, efficiency, and profitability.

The five most important values that should ideally drive OD work:

1. Empowering employees to act
2. Creating openness in communication
3. Facilitating ownership of process and outcome
4. Promoting a culture of collaboration
5. Promoting inquiry and continuous learning

When we asked respondents to rate these same values in the ideal, or what "should be" driving the field of OD, we found a substantially different pattern of results. Interestingly, this time all five of the highest rated values concerned the nature of human processes rather than the business outcomes.....This pattern of results would suggest that, ideally, OD practitioners would prefer to focus more on the humanistically oriented values if all other concerns were held in a vacuum; i.e., if the consultant were not concerned about losing the contract and the client emphasis was not always one of a "show me" or "produce results" mentality.

The five values that increased the most in relative importance between ratings:

1. Promoting inquiry and continuous learning
2. Protecting the natural environment
3. Fostering corporate citizenship in the community
4. Transferring OD skills and technologies to clients
5. Promoting a concern for human dignity

These five items, selected for their difference scores, represent the highest degree of change in importance between the "should be," ideal values ratings and the "current" ratings of the state of OD today. In comparing the two sets of ratings, we find items or values that are seen as increasingly important to practitioners, but not as predominant motivating factors for OD work at the present. In some ways, these values may be seen as emerging trends in the field.

## Success in OD Efforts

From "Organization Development Overview" Marge Yanker

### **What are some of the factors for OD success?**

Keys to the success of OD are:

1. Systematic Processes to identify problems, generating solutions, and implementing those solutions.
2. Employee Participation.
3. Timeliness.
4. Top Management Involvement.
5. Organization must be ready for change.

### **What are common stumbling blocks faced in carrying out successful OD work ?**

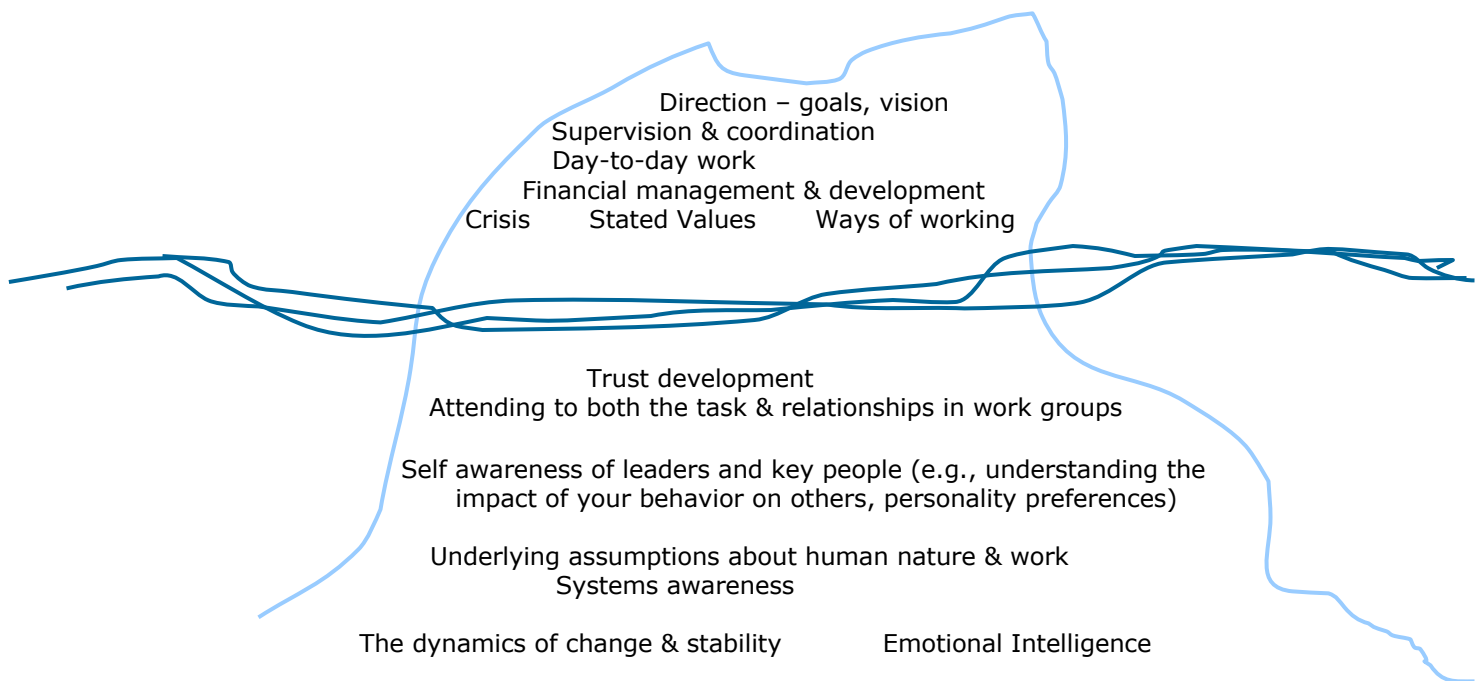
The strategies of OD to intervene in the ongoing activities of the organization and to facilitate the processes for improved effectiveness are often hampered by the following issues, among others:

- Trust within the organization (between individual, among groups, up and down the hierarchy, etc.)
- Methods of dealing with problems and/or conflict (open sweeping under the run, smoothing over, confrontation, etc.)
- Decision-Making processes (how and by whom, empowered employees, top down, etc.)
- "Ownership" of organizational goals (all, top only, one group, etc.)
- Communication Patterns (open, candid, feedback, etc.)
- Relationships (interdependent, independent, competitive, cooperative)
- Leadership/Followership (complementary, styles, etc.)

# OD Looks Under the Tip of the Iceberg

Organization Development is concerned with the total system: those aspects of an organization's life & work that are easily seen (the tip of the iceberg) and those that are often hidden (below the tip of the iceberg). The assumption is that all these elements of an organization's life are interrelated. So, if there is a problem in financial management it may just be that there is a need for more computers. It may also be that the people working in that area are having problems with trust or job satisfaction. OD helps an organization better understand itself, learn from its own experience, and improve its ability to solve problems and act on opportunities.

Here are some examples of what may be in the tip of the iceberg and what may be below the surface.



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## OD SERVICES

- Some examples from the Chicago OD Network web site

Note: This description of services talks about interventions from a consultant perspective. The same activities are done by managers using OD methods and knowledge.

Organization Development (OD) consultants provide services to improve organization effectiveness and/or individual employee effectiveness. The purposes are to increase productivity, work satisfaction and profit for the client company. The strategies appearing below "Organization" and "Employee" Effectiveness are defined to help you become an informed user of OD consultant services.

### **Organization Effectiveness**

Consultants apply organization effectiveness strategies such as those shown below when there are needs for assessment, planning, growth, quality improvement, teamwork and other organizational changes.

**Action Research** - An assessment and problem solving process aimed at improved effectiveness for the entire organization or specific work units. The consultant helps the client organization identify the strengths and weaknesses of organization and management issues and works with the client in addressing problem opportunities. (Some form of action research is generally applied as a foundation for other consulting strategies.)

**Conflict Management** - Bringing conflicts to the surface to discover their roots, developing a common ground from which to resolve or better manage conflict. Consultants serve as facilitator in a conflict situation or train employees to better understand and manage conflict.

**Executive Development** - One-on-one or group developmental consultation with CEO's or VP's to improve their effectiveness.

**Goal Setting** - Defining and applying concrete goals as a road map to help an organization get where it wants to go. (Can also be applied to employee development.)

**Group Facilitation** - Helping people learn to interact more effectively at meetings and to apply group guidelines that foster open communication, participation and accomplishment.

**Managing Resistance to Change** - Helping clients identify, understand, and begin to manage their resistance to planned organizational change.

**Organizational Restructuring** - Changing departmental and/or individual reporting structures, identifying roles and responsibilities, redesigning job functions to assure that the way work gets done in the organization produces excellence in production and service.

**Project Management** - The general management of specific work, blending diverse functions and skills, usually for a fixed time and aimed at reaching defined outcomes.

**Self-Directed Work Teams** - Developing work groups to be fully responsible for creating a well defined segment of finished work.

**Sociotechnical Systems Design** - Designing and managing organizations to emphasize the relationship between people's performance, the workplace environment and the technology used to produce goods and services in order to effect high level productivity.

**Strategic Planning** - A dynamic process which defines the organization's mission and vision, sets goals and develops action steps to help an organization focus its present and future resources toward fulfilling its vision.

**Teambuilding** - Improving how well organization members help one another in activities where they must interact.

### **Employee Effectiveness**

Consultants use employee effectiveness strategies such as those below when there are needs for employee improvement in skill, commitment and leadership.

**Career Counseling** - Focused attention on goal setting, career selection and job seeking help individuals make career decisions.

**Coordination & Management of Multi-Disciplinary Consultants** - One or several different technical specialists team up with an OD consultant to design and install new equipment, work processes, work methods, or work procedures.

**Creative Problem Solving** - Organization members use practical problem solving models to address existing problems in a systematic, creative manner.

**Interpersonal Communication Skills** - Increased skill in exchanging needed information within the organization and providing feedback in a non-threatening, non-judgmental way.

**Human Resource Management** - Managing the function of hiring, compensation, benefits and employee relations toward systematic goals of the organization's morale and productivity.

**Labor Relations** - Facilitation of conflict, planning and problem-solving among management and workforce union representation.

**Leadership Development** - Training in select areas which change managers to leaders. Includes visioning, change management and creative problem solving.

**Management Development** - Training in various management skill areas with particular focus on performance management, communications and problem solving.

**Stress Management** - An individual growth workshop designed to arm and activate healthy responses to stress. It enables participants to maximize positive stressors and minimize the negative, both for themselves and others.

**Workforce Diversity** - Facilitating understanding between groups toward the goal where differences among people in an organization become the strengths for competitive advantage, productivity and work satisfaction.

# OD Research -- what seems to work?

For the details look at *Organization Development* French and Bell pp.312 - 319

## Results seen in a significant number of cases

- Economic performance improved - impact on costs, profits, quality (about half the time)
- Improvement in process variables -- goal emphasis, decision making, human interaction such as openness
- Employee productivity
- Worker satisfaction

## Methods Used

- Managerial Grid
- Task-oriented laboratory training
- Survey feedback
- Use of multiple intervention approaches
- Relatively short term OD projects (4-6 months) and relatively long term projects (25 or more months)
- Socio-technical systems (STS)
- Goal setting
- Training
- Appraisal and feedback

## Examples of links between results and type of intervention

### Results

### Intervention

Greater impact on attitudes

Human process interventions (team building, lab training) ; STS - lesser affect

Higher job satisfaction, commitment, performance and lower role stress, physical symptoms, turnover

Increasing autonomy and participation

Increased productivity, reduced absenteeism, turnover

STS interventions -- increase pay, self directed teams

Increased productivity

Organizational arrangements like -- employee feeling more in control, belief in the value of the work, being challenged, engaged in life long learning, recognition for achievements

Outstanding financial returns to shareholders and significant competitive advantage

Employment security, selective hiring of new personnel, self managing teams and decision making decentralizing, high compensation related to organizational performance, extensive training, reduction in status distinctions across levels, extensive sharing of financial and performance information throughout the organization

## ROLES FROM WHICH OD EFFORTS CAN BE STARTED

In each role the person is using Organization Development knowledge and methods in a process of organizational improvement.

<b>THE ROLE</b>	<b>CHARACTERISTICS</b>	<b>BENEFITS</b>	<b>COSTS</b>
<p><b><u>Manager</u></b> The CEO, executive director, president or the manager of a department are all people with the primary responsibility to take action for system improvement.</p> <p><u>OD Team</u> - an extension of the manager's authority; team shares responsibility for OD effort.</p>	<p>Has the legitimate authority for shaping processes, structures and climate; also for initiating and monitoring; visible, accountable.</p>	<p>Easier to make entry into the system. More focused on results. Has a defined place in the organization.</p>	<p>May be drawn away from OD effort by other demands. Becoming the target of the system's cynics and those resisting improvement effort.</p>
<p><b><u>Internal Consultant</u></b> Has a defined position within the organization that carries responsibility for consulting and training activities toward organizational improvement. Is not a manager with the authority to initiate OD efforts.</p>	<p>Visible. Is accountable to several sources (the internal client, the client's "boss"). Needs contracts with others in order to function.</p>	<p>Is part of the system. Can develop a highly integrated sense of how to do an OD effort in this particular organization. May be more secure (financial and psychological).</p>	<p>Less status than external consultants. Dependent on others for authority to function. Low influence. Political binds. May be under pressure to do projects or do them in a manner that violates own sense of good practice.</p>

<p><b><u>External Consultant</u></b>  Is not part of the organization's on-going life. Is contracted with to provide consulting and training services to facilitate improvement.</p>	<p>High visibility. Temporary in the system. Has a formal contract.</p>	<p>Independence in selecting work. Possible variety of clients. Clear contracts. May see things the insiders fail to see. May be able to productively use dependence.</p>	<p>Has to generate own clients. Lack of peers to work with in efforts -- lack of critique, loneliness. May be unfamiliar with the organization and the product or services it offers -- may lead to misunderstandings, lack of integration in approach. Not seeing the long term results.</p>
<p><b><u>Internal Change Agent</u></b>  Any member or employee in the organization that acts for improvement on their own authority. Has no organizational authorization for the effort.</p>	<p>Role is not formally defined or authorized. May call for low visibility. May be risky.</p>	<p>Acting on own values. Sense of purpose.</p>	<p>Risk of punishment - being ostracized, loss of job or membership.</p>



# OD Values

From "Values in Practice in Organization Development: An Interim Report" Paula Yardley Griffin and Arnold Minors. Being done for the OD Network, 2002

- Clear contracting is an essential part of high-quality OD, with shared responsibility for communicating expectations and values.
- Good OD: focuses on the big picture, is strategic, long-term, and fosters taking a systems approach. We look for patterns and balance. We avoid "toolbox" approaches.
- There is no agreed-upon way of evaluating a practitioners' competency. We value competence enough that many of us seek a certification process.
- Commitment to organizational results is an important element in our credibility.
- Speaking the language of our customers enhances our credibility with decision makers.
- Self-awareness and self-development are long-held values for OD practitioners, including the ability to maintain objectivity, and the willingness to continually grow.
- OD practitioners deal with complexity, diversity, integrating values into their work and being authentic.
- We value valid data as a foundation for action, and data-based diagnosis.
- Holding self apart, maintaining objectivity, understanding own biases and not letting them interfere, looking at assumptions, pursue self development are key for OD practitioners.
- The client/consultant partnership requires strong relationships. OD practitioners work *with* clients, not *through* or *around* them.
- Good OD practice requires good diagnostic skills, examining assumptions, looking beyond presenting problems.
- Ambiguity, paradox and managing dilemmas are core parts of OD practice today.
- Our values (as well as our culture and perspective on complexity) inform the processes and interventions we choose, which affect the results we get.
- One of our roles is to help clients explore their values, as well as the gaps between values and practice.
- We value involvement; we strive to assist stakeholders in developing ownership of their organizations, problems, and solutions.
- It's important that we are able to be present and authentic in our dealings with clients.
- The issue of client readiness is important to us. We should not raise issues based solely on our own values, but balance those with the client's ability to address the issues.
- We value diversity within the systems in which we operate. We seek to ensure minority opinions are heard, and to enable discussion of diversity issues.
- We value the integration of organizational, group and individual needs, rather than working to adjust the individual to the organization, or vice-versa.

# Long range thinking about development

1. **Take the time** - it is long range (3 years, then 2 more, then 3 more - see it as 7 -8 year process)
2. **Stay at it** -- all the time –
  - 1) series of planned interventions
  - 2) increased "here & now" intervention capacity
3. **Manage your demand system**
  - Your time & energy naturally get drawn into administrative tasks, institutional mini crisis, people who want you to solve their problems, etc. Some of it needed and appropriate, some related our own Self Differentiation Leadership issues
  - Create a demand system re. your time and energy that focuses around the primary task -- already exists to some extent, e.g., Sunday HE; You need to get activities on your schedule that cause you to spend time on Primary Task related work (e.g., a silent retreat, having a foundations course, teaching sermons re. Eucharistic spirituality, etc.) set up so it creates demand on you; and in time they expect it of you
4. **Keep your "head above water"** -- continue training; use consultant; read deeply; attend to own spiritual life; have the key models & theory in your head
5. **Deal with yourself** -- What you do to block yourself? What competencies need developing?

## THE FORMATION OF A CONGREGATIONAL DEVELOPMENT PRACTITIONER

MOVING FROM



TO

Talking "about" (loose discussion about parish issues)



Disciplined Process

Own "bias" and experience

Theory base, and Own "bias" and experience

Only "problem identification and solution



More options for process

From focus on creating & running programs or institutional administration or a limited sacramental or prophetic or pastoral role. Seeing parish ministries primarily one-on-one pastoring.



Focus on shaping a healthy culture and community, focused on its primary task; On maintaining a broad overview of the system's life and effort to nurture and sustain the health and integrity of the system.

### Learning Process

#### 1. Training

- Four weeks -- workshops in organization development or congregational development
- 5 days – group development & team facilitation skills
- 5 days -- consultation skills
- 5 days -- human interaction
- 5 days -- design skills
- 5 days – conflict management

#### 2. Mentoring - with an experienced practitioner

#### 3. Practice - opportunities to work as a leader or consultant in OD/CD efforts

#### 4. Process of Assessment - self, client, peer

#### 5. Broad reading in OD and CD

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# TRUST DEVELOPMENT IN ORGANIZATIONS

Trust development in organizations, groups and inter-personal relationships involves the creation of structures, processes and behavioral norms of reliability, responsiveness and congruence - that increases inclusion and acceptance, the open flow of information, a shared direction established from options, internal commitment, self management and collaborative relationships.

The Target	The Issues	Examples	
<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Internal Commitment, Self Management, Collaborative Relationships</b> </div>	<ol style="list-style-type: none"> <li>1. Empowerment structures</li> <li>2. Increase authority with increased competence, commitment and maturity</li> <li>3. Mutual influence and accountability</li> </ol>	<ul style="list-style-type: none"> <li>▪ Create self-managing teams and a "collective voice" structure.</li> <li>▪ Train in decision-making, action planning and negotiation</li> <li>▪ Review leadership roles and decision making process.</li> </ul>	
	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Shared Direction</b>                      [Set From Choices]                 </div>	<ol style="list-style-type: none"> <li>1. Decisions based on options</li> <li>2. Free Choice not coercion or habit</li> <li>3. Renegotiable</li> </ol>	<ul style="list-style-type: none"> <li>▪ Develop alternative solutions and strategies</li> <li>▪ Move in "owned" direction</li> <li>▪ Openly explore pressures felt to move in various directions</li> <li>▪ Willingness to revisit decisions.</li> </ul>
		<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Open Information</b> </div>	<ol style="list-style-type: none"> <li>1. Openness of climate</li> <li>2. Useful and timely information</li> <li>3. Listening stance</li> </ol>
<div style="border: 1px solid black; padding: 5px; text-align: center;"> <b>Inclusion &amp; Acceptance</b> </div>	<ol style="list-style-type: none"> <li>1. Acknowledge people</li> <li>2. Connected to Primary Task and Vision</li> <li>3. Acceptance of the objectives of "this meeting"</li> <li>4. Of each person's role in relation to task</li> <li>5. Of organizational culture re information flow, decision making, degree of self-management</li> </ol>		<ul style="list-style-type: none"> <li>▪ "Hello!" norm</li> <li>▪ One-minute management</li> <li>▪ Manager take groups to lunch each month</li> <li>▪ Keep it in front of people</li> <li>▪ Review objectives of meeting, test affirmations/concerns</li> <li>▪ Each share what they bring to the task</li> <li>▪ Provide clear information re culture; ask person about our sense of "fit"</li> </ul>

# THE RELATIONSHIP CYCLE IN ORGANIZATIONS

The Relationship Cycle is a tool with the following purposes:

- To assess conflict causes and dynamics
- To understand the function of structures and processes that facilitate an organization's adaptation to new external forces
- To understand the function of structures and processes that allow the organization to make use of new ideas and visions, problems and pain, which are carried by participants in the organization
- To create in an organization a "common language," a set of concepts, skills and norms, that allows participants more effectively to negotiate their life together.

All relationships in organizations can be seen as going through five stages. These stages seem to hold true between organization and employee, association and member, a manager and staff person, priest and parishioner, and so on. The same stages are present in forming a new team or creating a new organization.

## **Stage 1: Create and Negotiate Relationships**

Beginning and changing relationships in the organization always involve the exchange of information about what is hoped for and expected in the relationship. The potential employee and employer are each seeking and providing information in the process of searching for and offering a new position. The sharing of what is wanted and hoped for continues until they achieve, or fail to achieve, a mutual acceptance. This initial acceptance is simply "enough for now," enough to move forward together.

In this stage all the possibly useful information that might be shared is not shared. The parties involved do not know all that might be relevant information to some future issue. There is also frequently information that is hidden or suppressed as each focuses on making a favorable impression on the other.

## **Stage 2: Agreement**

Agreement(s) emerge out of Stage One's work. They may be informal understandings or written contracts. The depth of commitment will depend on the nature of the relationship. The longer term, more complex and central the relationship, the stronger the commitment needed for the relationship to function effectively.

## **Stage 3: Stability**

Frequently the result of an initial agreement is a "honeymoon" period. People give each other the assumption of good intentions. Judgments are postponed. The people involved don't really know each other or the task very well. Previously unspoken or unheard, and new hopes and expectations will come out. Some of these will rub against what had been understood. The person you thought you had hired isn't what you are seeing now. She is more or less skilled or civil or assertive, than you thought. This will show itself in Stage Four.

While the relationship is in a state of relative stability or equilibrium, there is more likely to be a sense of satisfaction between participants and the energy available for the work. This capacity to focus on the work to be done, combined with training, a motivating climate and adequate resources, usually results in increasing levels of productivity.

## **Stage 4: "The Rub"**

Eventually, all relationships experience forces that unsettle their equilibrium. The forces may come from sources external to the organization (e.g., national or regional social and economic trends), or may rise from new hopes or concerns among participants. Relationships are put under pressure by such forces and must address the new situation that follows in order to maintain stability. Failure to come to terms with these forces will cause a "festering" situation that takes those involved into a "Blow Out," a high level of conflict.

## **Stage 5: Process of Planned Change and Negotiation**

This stage happens because the organization operates on the assumption that "rubs" is a frequent, inevitable and useful occurrence. With that understanding, the organization can establish structures, processes, a climate, and resources that enable it to hear and engage the "rubs." The need is to create and maintain ways of gathering and interpreting information, planning and responding appropriately to the diagnosis we make, and continuing to evaluate the outcome of the action taken. The organization needs ways of doing this in relation to external social and wider organizational forces and shifts from within the organization.

This approach to managing organizational change can keep the system in touch with itself and its environment, create a "demand system" for continuous improvement, help negotiate differences, and prevent the development of high conflict levels.

### **In the organization:**

1. Establish structures and processes that help receive new information.
  - Strategic management processes for listening to the organization's environment and making needed changes in response to the information.
  - Channeling structures for gathering "rubs", prioritizing and taking action.
  - Ways of "testing" issues that are raised by few people -- testing the extent to which others in the system share the issue.
  - Establishing action-research projects as a way of engaging a "rub" by clarifying hypotheses and testing out approaches in a manner that allows the organization to learn from its experience.
2. Train, coach and provide support structures to build people's awareness and assertiveness. The type of structures and processes described above may make it easier for people to be more aware and assertive while accepting responsibility for their views.
3. All this is facilitated by a climate of high trust. Organizational leaders need to take a stance that is open to new information, clear about essential system boundaries, and protects the core structures and processes to enable information flow.

## **High Conflict Levels: The Other Possible Cycle**

Another cycle is likely to occur if the organization has an inadequate "process of planned change and negotiation," or if the process fails in a particular situation. "Rubs" may move in several directions:

1. The person or group manages it himself or herself. They decide it really is not worth the trouble of having the organization address it or that it is something that is best handled in a manner that doesn't involve the organization.

2. The "rub" is brought into the organization's "process of planned change and negotiation.
3. The "rub" continues to be of concern to the person or group. There is likely to be frustration, anxiety and a festering of the "rub." It may be that the organization is unable or unwilling to effectively engage the concern, or it may be that those with the concern are caught up in their own cynicism, sense of victimization, and passivity.

If the third direction is the path being taken, the drama may continue to build in the people and the system until there is a "**Blow Out**." That may take several shapes:

1. It may take the form of a public, very intense battle.
2. It might express itself in a series of smaller irruptions that end up having the same effect as #1.
3. It might be internalized in a leader and show itself in health problems or inappropriate behavior, i.e., there is a "blow in," the person takes the festering into themselves.

It is important for organizational leaders to assess the situation:

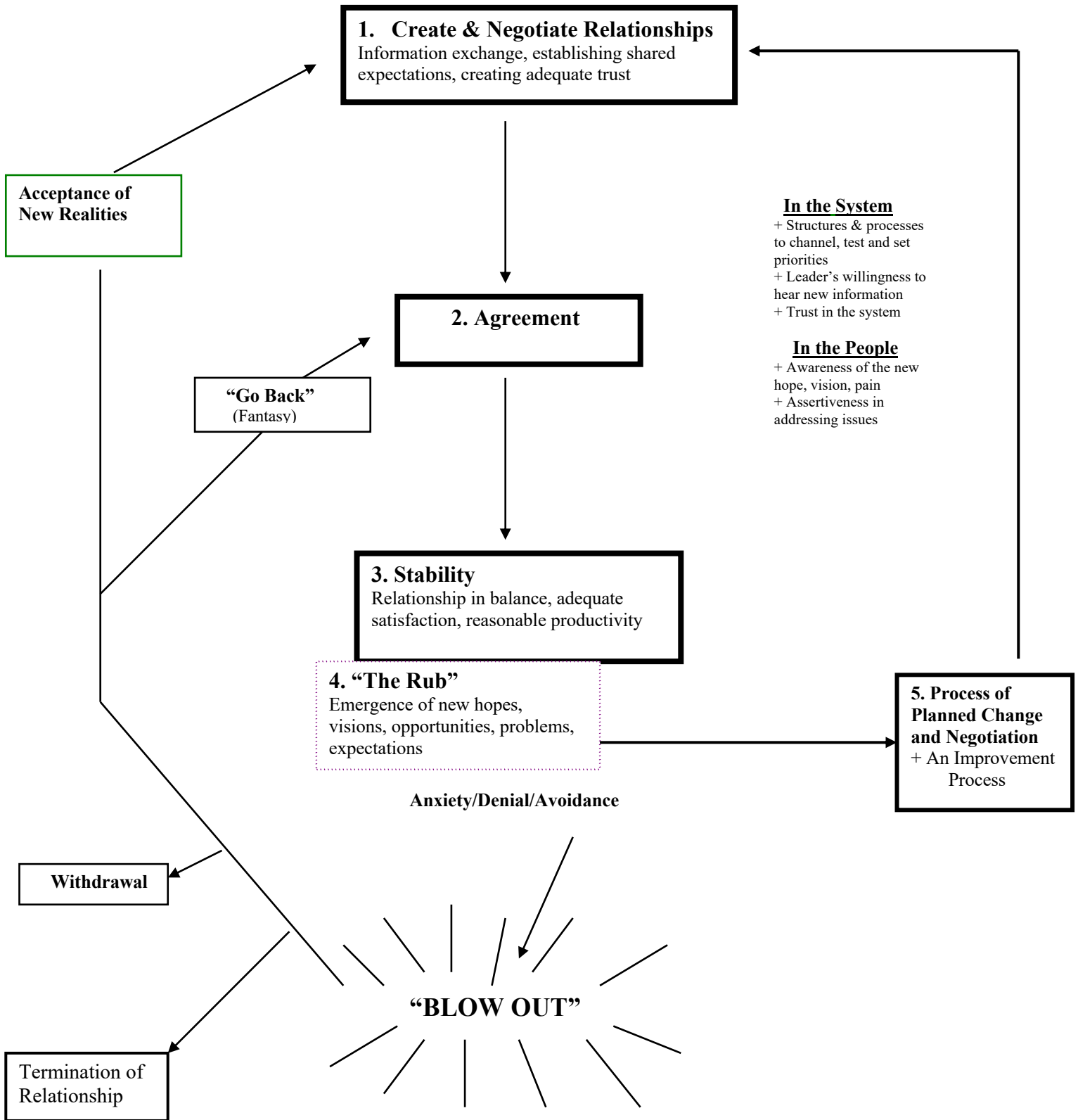
- Does the "Blow Out" involve the whole system, critical subsystems, or influential people?
- Are there issues involving the organization's mission, vision, and core values?
- Is this an attempt to sabotage the organization's strategic direction?
- Is this an expression of "cynic, victim or bystander" behavior coming from people with a pattern of such behavior?

Once the conflict cycle is underway there are **four options**:

- 1. Termination of the Relationship** -- The person quits the job or is fired, resigns from the association, asks to be transferred to another parish church, etc.
- 2. Withdrawal** -- Those involved reduce their participation, cut their financial contribution, increase their passive behavior, etc.
- 3. "Go Back"** -- The case may be made that "if only we could return to the earlier agreement, all would be well again." This may be expressed in legalistic terms or as a form of sentimentality.  
In any case there is never a way to really "go back"; people have changed. The "Blow Out" has taken place.
- 4. Acceptance of New Realities** -- The key that allows people to return to the process of creating and negotiating their relationships in the organization is that the new realities must be accepted. Accepted, not necessarily liked or approved of. The work that follows such acceptance will mean using many of the same processes and methods that fit Stage Five.

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# RELATIONSHIP CYCLE IN ORGANIZATIONS





# LEVELS OF CONFLICT

Based on Spead Leas, *Moving Your Church Through Conflict*

For it to be a system conflict a significant percentage of people, or people with significant influence, need to be upset with the practices/policies/style/person of the current leadership.

A task of leaders is to develop the organization's capacity to solve problems and manage the "rubs" that are a normal and useful part of organizational life. This allows the organization to be a more productive and satisfying environment while also heading off serious conflict. As part of its life an organization needs to be engaged in a developmental process of building trust, developing communication and negotiating skills, and establishing processes to manage concerns and new ideas. This gives people the ability to keep conflict at the lower levels. As conflict moves to higher levels people tend to resist skill development, elaborate problem solving methods, the introduction of new ground rules, etc. So, these things are best done when the organization is not in conflict.

LEVEL	SYMPTOMS	STRATEGY
I PROBLEM TO SOLVE	<p><b>Objective of those involved:</b> fix the problem</p> <p><b>Tone/behaviors:</b> optimistic, collaborative, problem not person focus, rational; language is clear, specific, here and now, adult; real differences over goals, values, needs, plans, information; people understand each other and disagree.</p>	<p>1. Facilitate decision making by <u>collaborative problem solving</u>, or if not possible, by <u>negotiation</u>, or if not possible, by <u>formal authority action</u> (by voting or leader decision.)</p> <p>2. <u>Methods</u> -- establish meeting norms, use a facilitator and a disciplined process, brainstorm and prioritize, use communication skills, etc.</p>
II DISAGREEMENT	<p><b>Objectives:</b> self protection, not getting hurt; solve the problem</p> <p><b>Tone/behaviors:</b> cautious, not hostile; general language to protect people and self, e.g., "there is no trust", "we need more openness"; hostile humor, distancing comments; withhold information that might serve the other side or damage your side.</p>	<p>1. <u>Reduce tension and facilitate people's work together</u> --the need here is to keep people close enough to work though their differences and not engage in withdrawal or begin to get aggressive. Encourage people to "hang in", attend and prepare for meetings; coach people to act, to be assertive, help people fully express their concerns and to listen to the concerns of others; provide ways to build relationships, ways for people to know each other as people, to speak with each other about common interests and needs.</p> <p>2. <u>Methods</u> -- role reversal, expectations clarification, paraphrase and itemized response, brainstorm and prioritize, use facilitator, etc.</p> <p>2. <u>Establish ground rules</u> -- get agreement about how we will work on the issue, e.g., no threats, identify sources of information, direct sharing of differences, no personal attacks, no withdrawing; norms for meetings, etc.</p> <p>3. <u>Make decisions</u> -- collaborative problem solving --- negotiation --- formal authority</p>

<p>III CONTEST</p>	<p><b>Objective:</b> win, not yet at level of wanting to hurt the opponent.  <b>Tone/behaviors:</b> win/lose dynamics, threatening, difficult, resistance to peace overtures, hanging back waiting for others to show weakness, personal attacks, emotional appeals, limited social contact; language is distorted - overgeneralized ("you always..", "everyone.."), exaggerated, making a case, expecting magic or rapid change, expecting others to read your mind, extreme, only two sides, lose the shade/gray.</p>	<p>The overall need is to reduce fear and distorted thinking; to provide a sense of order.</p> <ol style="list-style-type: none"> <li>1. All the strategies mentioned for Level II, as possible.</li> <li>2. <u>Structure the process</u> -- work out a clear process; dates of meetings, time lines, etc. Revise it as needed; but work at maintaining a sense of order and direction. There is a high need for a process that is seen as fair, open, and legal.</li> <li>3. <u>Use an external consultant</u></li> <li>4. <u>Contact between parties to the conflict needs to be carefully managed</u> -- opportunities for people to express feelings and clarify their interests need to be provided for each side; this usually needs to first be done apart from the other side; when they are ready to work together, then have a carefully facilitated meeting.</li> <li>5. <u>Decision making</u> -- the same sequence as at other levels; however, the more persuasion, compelling and voting the more likely that people will leave the organization.</li> </ol>
<p>IV FIGHT/FLIGHT</p>	<p><b>Objectives:</b> hurt/get rid of the others; being "right"  <b>Tone/behaviors:</b> factions inflexible, clear lines, strong leaders emerge; language becomes ideological - about principles, truth, rights; parties detached, causing each to lose sense of the pain they cause; attempt to enlist outsiders in the cause, parties will not speak with each other, self righteous, cold</p>	<p>More tension will require more structure.</p> <ol style="list-style-type: none"> <li>1. <u>Use an external consultant/mediator</u> -- this can not be someone from the central office.</li> <li>2. <u>Follow the book</u> -- legal issues may be involved, trust is very low; follow the organization's standards.</li> <li>3. <u>Communicate through third parties</u> -- seek an agreement for third parties to serve as "go-betweens" to carry messages, look for possible areas of agreement, Most likely to be useful when the issue is clear.</li> <li>4. <u>Be tougher about the ground rules</u> --enforce expectations about personal attacks, loaded language; might have a group that monitors agreements and gives feedback to violators.</li> <li>5. <u>Decision making</u> -- likely to be by formal authority. Some are likely to leave.</li> </ol>
<p>V INTRACTABLE SITUATION</p>	<p><b>Objective:</b> destroy the others  <b>Tone/behaviors:</b> attempts to do serious damage to the other's reputation, position, well being; attempts may continue after the parties have been separated</p>	<ul style="list-style-type: none"> <li>- The conflict is no longer manageable.</li> <li>- Outside authority will need to make difficult decisions.</li> <li>- The parties need to be separated.</li> <li>- Some people may need to be asked to leave.</li> </ul>

# CONTEXTUAL ISSUES

## The Context of the Organization

Organizations exist within a wider social and institutional setting that includes cultural, political and economic forces that may be regional, national or global. They frequently operate within a larger organizational framework that comes from being part of a national organization or association. One way of picturing the situation is:

	<b>WIDER SETTING</b>	<b>LOCAL SETTING</b>
<b>SOCIAL CONTEXT</b>	Social, economic, political and cultural forces on a national/global scale	+The impact of wider contextual forces on the region +Forces that are peculiar to the region
<b>ORGANIZATIONAL</b>	Forces coming from the wider organizational context, i.e., "national", "home office", the "field" of the organization's work. This may include policies, resources, the organizational culture, national reputation, etc.	<u><i>THE ORGANIZATION</i></u> The goals, structures, culture, people, size, leadership and dynamics of the organization. The strengths and weaknesses. How it relates and adapts To the forces of its social and organizational context.

## Contextual Issues: Factors Shaping Organizational Life

### Wider Social Context

1. Long term changes in the culture -- the role of women; changes in our understanding of the "common good" or civic life which include shifts in our understanding about commitments from being broad, public, and long term to market driven, private and short term; movement from an organic, integrated society to a fragmented society; etc.
2. Current political, social and economic changes.
3. Generational groupings -- cohorts that share a history and whose view of values, thought patterns, the "way things are" is shaped by that history.
4. Values groupings -- segments of the population that share overlapping values

## Local Social Context

1. The local expression of and response to broader cultural forces.
2. Regional culture -- the values, attitudes, climate of this particular neighborhood, city, region of the country, etc.
3. The region's responsiveness to the type of service, product and organizational style of the organization.

## Wider Organizational Factors

This may include forces that effect the local organization because of its being part of a larger national or international organization, association or grouping.

1. The policies, values and vision of the larger organization or group.
2. The resources provided to the local organization.
3. The reputation of the larger organization or group in the region of the local organization.

## The Local Organization

1. System assessment factors -- productivity, innovation, quality of service or product; information flow response time, usefulness and accuracy; quality of work life, organizational culture; ability to set direction and navigate toward it, management/leadership strength.
2. Size and the dynamics related to size.
3. Leadership style.
4. Primary psychological contracts.
5. Organizational self definition.
6. Dominate strength.
7. Dominate organizational pathology.

## The Diocese and Contextual Issues: The Local Organization

You can use this outline to assess your diocese as "the Local Organization". Focus on areas that you think are most likely to help you better understand the diocese.

1. Review Four Key Systems assessment
  - In broad terms, what do you hear?
  - Where is the "energy"?
  - What agreements do we need among us and as a diocese that may improve our work together?
2. Diocesan Type - our organizational character
  - Going through any transition? Effect?
  - Internal dynamics - where is the energy? -where division and tension?
  - Does this Type fit what is ahead?
  - What would it look like if diocese was in "the Grip"?
3. Competence to work together in teams [competence for facilitation, process and working out agreements]
  - a. In staff
  - b. In diocesan committees, work groups, etc.

### c. Among the clergy

#### 4. Blocks in the system

- Identify where there is a divided heart or mind
  - as a whole diocese
  - in the Bishop's office
- What is our diocesan pathology? (Or, if you were going to have a pathology, what would it be?)
- How do we get in our own way? How do we sabotage ourselves?

#### 5. The dominant strength of the diocese

- What could be built on? Expanded?

#### 6. The diocese as a congregational development system (see Elements of Dio. CD System, pp. 1-14)

- How well does the diocese monitor congregations and take action on their health
- How clear are our directions about congregational development
- How effectively are we acting on that strategy
- Are our resources adequate to support the strategy
- How well does the diocese
  - develop trust
  - manage the "demand system"
  - build long-term capacity

## Leadership in Dealing with Contextual Issues

### Assumptions

- Social context and wider organization forces have a potent bearing on the local organization's life. The influence is increased: the more the organization is itself part of mainstream culture; the more it is in relationship with or shares in the mission, vision and values of the wider organization; and when it is small or has a weak self definition.
- The extent of the organization's ability to control or influence social context forces is very limited. There may be more ability to influence the wider organization in the forces it creates which effect the local organization.
- The local organization typically thinks it has more control over external forces than it really does.
- Low influence and the failure to see and accept that reality, may set loose a cycle of fear and blaming. This is often directed at the organization's leaders. While energy is being consumed in the fear and blame cycle the organization is unable to effectively engage its own renewal.

## Goal and Objectives

The long-term goal is to increase the organization's capacity for self-revitalization; to increase its ability to adapt to new conditions, solve problems and pick up on opportunities, and learn from experience.

- To keep the organization in touch with its own purpose, identity, vision, values, etc.
- To help the organization maintain core processes/habits of operating that are closely related to its purpose, identity, vision and values.
- To create processes and structures in the organization so it can see, understand and appropriately respond to the forces effecting its life.

## A Process

1. Identify the active forces in the social context and the wider organization that have or may have influence on the organization.
2. Identify the degree to which the organization has control over or can significantly impact these forces.
3. Identify what the organization may do to adapt to the forces, in a manner that advances or protects the organization's mission, vision and values.
4. Help others in the organization do the same three steps. Seek a common understanding.

# WORKSHEET

**Please fill in the worksheet two steps --**

1. In "brainstorm" fashion, list forces, in each box, that are having an effect on your organization.
2. Focus on the *Social Context* and *Wider Setting Organization* boxes. Circle the forces that you think are having the most impact on your organization.

	<b>WIDER SETTING</b>	<b>LOCAL SETTING</b>
<b>SOCIAL CONTEXT</b>		
<b>ORGANIZATIONAL</b>		

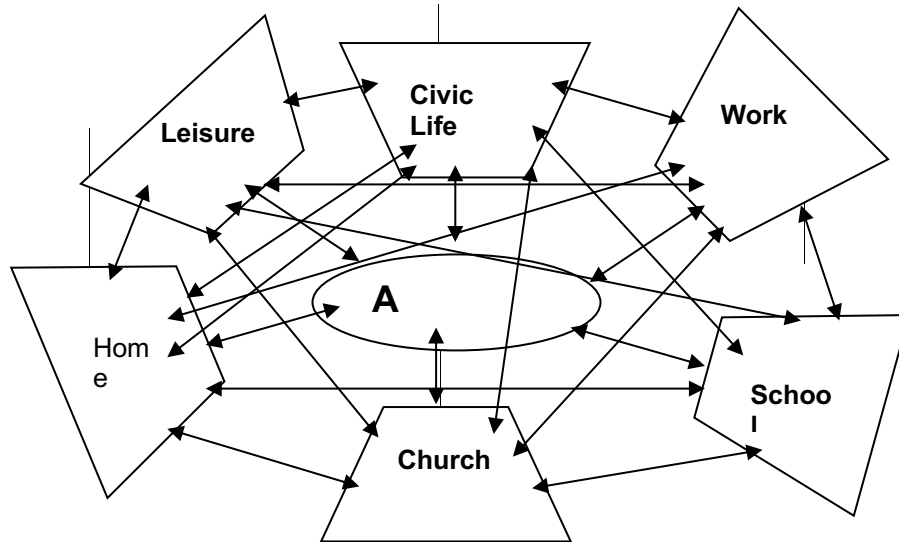
# Organizations in a World of Choices

## From an integrated and limited world to a fragmented world with choices

-- based on Doug Walrath's *Frameworks*

### Integrated World

The situation in most people's lives before 1945.

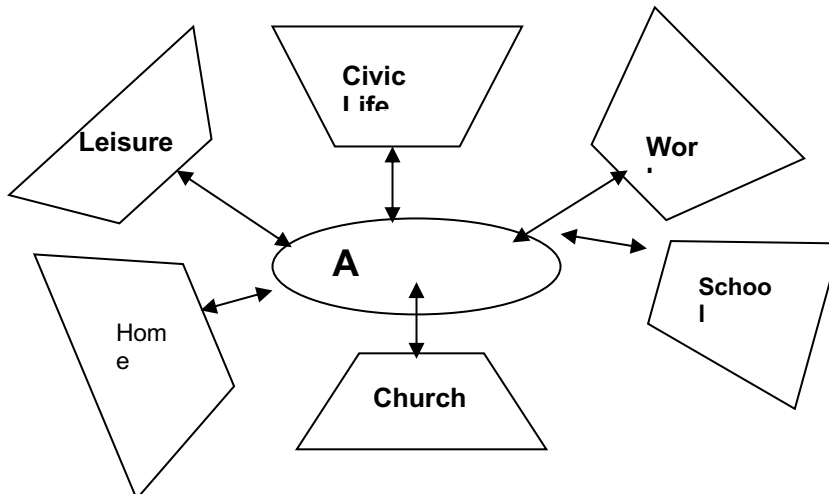


The elements of life in organic relationships; engaged in mutual adaptation with each other. There are fewer choices. The society can tolerate a few "odd" people (they are our "odd" people). Some are excluded because they are different. Some may opt-out but they are known (not anonymous)

---

### Fragmented World

Increasingly the situation for most people.



Each aspect of life has its own values and culture, makes independent claims on people's time, money and energy. There is more choice; more autonomy and more of a capacity to be anonymous.



## **Some Adaptations to a fragmented world**

- Acting as if nothing's changed
- Withdraw from segments where stress is the greatest
- Restrict ourselves (relationships / physical space) related to where we live
- Choose one segment and devote as much time as possible to it

## **What does the fact of the fragmented world mean for organizations?**

- The organization can itself *strive to be an integrated culture* which is also open to the world. This is related to productivity, information flow, quality of work life and leadership in shaping and implementing vision.
- The organization can acknowledge that many people's commitments will be short term given the increased mobility, flexibility and demands of their lives. There is a need to structure ourselves so we quickly include people in leadership and teams. Fewer people will maintain long term or lifelong relationships with particular organizations. We need a broader base of participation and leadership in just that group.
- The organization can *take on the task of assisting people to live integrated lives in a fragmented world*. This is a quality of work life issue or in a deeper sense it is a matter of spiritual life.
- The organization can function in a manner that takes into account the fragmentation of employee's lives, e.g. provide day care assistance, show some flexibility in regard to family pressures, encourage personal health, have flexible work hours, have support groups, intentional programs to build relationships, etc.
- The organization can seek appropriate "partnerships" with other sectors, showing an interest in the well being of it's employees and the common good of society.

Robert A. Gallagher

# Three World Views

This is a review of research done by Paul Ray & Sherry Ruth Anderson. It describes three primary worldviews present in the US population that are based on values. Their research is written up in *The Cultural Creative*, Harmony Books, 2000; *The Integral Cultural Survey: A Study of the Emergence of Transformational Values in America* by Paul Ray, the Institute of Nortic Sciences, 1996; and in *American Demographics* - "The Emerging Culture" by Paul H. Ray, February 1997.

What the research discovered was the existence of three primary worldviews. The researchers titled them:

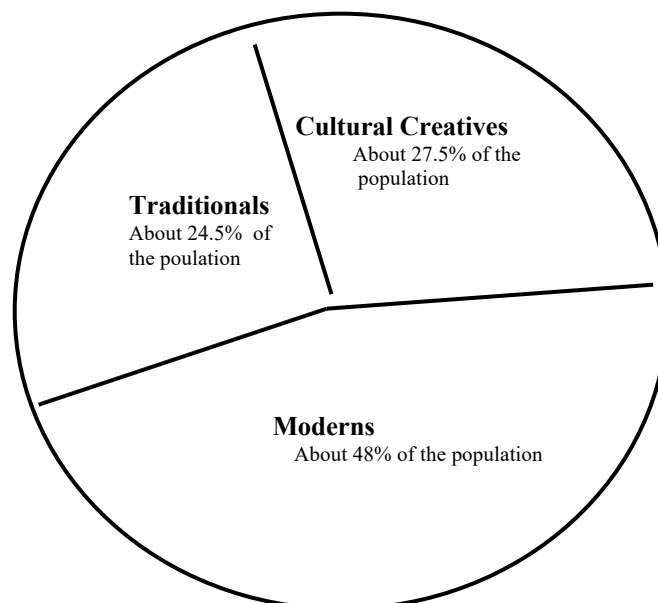
- Moderns
- Traditionals
- Cultural Creatives

**Moderns** – A group with values related to economic and technological progress and the range of choice that such progress brings; they accept the commercialized world as an acceptable and even essential way to live; tend to value achievement and financial success, having a wide range of choices, and being in touch with trends and innovations in society.

**Traditionals** – A grouping that values more traditional standards for relationships in the family, church, community and workplace; and are generally more socially conservative than the rest of the population, e.g., favoring the freedom to carry guns, more restrictions on immigration, male leadership and responsibility in the family and other institutions, social controls on various forms of sexual behavior (teen and extramarital sex, abortion, pornography, abortion).

**Cultural Creatives** – A group with high environmental, feminist and community oriented values; tend to be more idealistic, more focused on relationships and self-actualization; more inclined to volunteer time, be seeking a simpler life style, be open to the idea of religious mysteries.

All the groups overlap on all values. Ray and Anderson are describing tendencies in the population.



## The Three Groups in Relationship to One Another

All three groups appear to share certain values, e.g., rebuilding communities and neighborhoods, liking to visit foreign places, seeing something of the sacred in nature, "green" values, etc. The Cultural Creatives tend to hold these values more strongly than the other groups. There are likely to be differences when each group describes how it would go about acting on these values.

Moderns – increasing as a percentage of the population

Traditionals – decreasing; Ray & Anderson estimate that in the mid 1940's they would have been 50% of the population

Cultural Creatives - increasing

The Moderns are the dominate subculture shaping our social norms, in charge of most institutions, reflected in the primary media outlets, and establishing the framework for dialogue and debate in the culture. Much of the public debate is carried on between Moderns and Traditionals. Cultural Creatives have little awareness of being an identifiable subgroup and those who are in that group tend to think there are fewer people sharing their values than is the case.

Because of the overlapping system of values there are alliances that may develop between two of the groups. For example:

- Traditionals & Cultural Creatives *may* come together in an organization to create or maintain relationships and simpler forms of existing vs. the Moderns desire to focus on organizational success; or they might work together in political reform efforts
- Moderns & Cultural Creatives *might* join together around improving the position of women in the workplace or in resisting someone initiative from "the religious right."
- Moderns & Traditionals *might* join efforts in protecting property rights or financial status
- Because we are all strongly influenced by the predominate culture, which is shaped largely by the Moderns values and interests, all the groups will at times function in ways that reflect that primary culture. So, we may all find ourselves setting goals and measuring outcomes, or being caught up in our desire for new things, etc. However, Traditionals and Cultural Creatives will also pull away from the values and related behaviors.

Moderns – 54% men, 46% women; median age 39; 27% college grads +; may idealize the present modern approach to life

Traditionals – 46% men, 53% women; median age 53; 14% college grads +; may idealize a time in the American past

Cultural Creatives – 40% men, 60% women; median age 42; 30% college grads +; may idealize an image of a "better world"

Politics – Around 1/3 of all three groups identify themselves as Democrats; Moderns & Cultural Creatives each have about 27% independents; Traditionals have fewer independents and more Republicans. When looked at in terms of "left-right-center" around 45 – 49 % of all three groups identify themselves as being in the center; the second largest identification for all three groups was "right" with Traditionals having the most and Cultural Creatives the least.

## Additional Information on the Three Groups

### Moderns

- This group may be the least influenced by other groups. Because they are so aligned with the predominate culture they are in a sense enmeshed in it. It is simply the way things are; it is like the air we breathe or water coming out of the faucet. As a group it is less aware of alternatives to the existing way of working.
- Tend to see "bigger as better"; might disagree what should be bigger, e.g., business or government.
- Like to set goals and measure results
- Reject the concerns and values of the other groups. May show up in annoyance toward rural, small town or native people's; or bewilderment or bemusement toward New Agers or religious mystics.
- Is made up of subgroups, e.g., one group that is largely upper and upper middle class; upholds what they understand to be "the American Way" and the work ethic; does have some interest in psychological growth and health (a point of connection with Cultural Creatives). A second group that while being affluent is more cynical and carries a strong dislike of the values held by Traditionals and Cultural Creatives. A third group of middle income people who find themselves striving for success, holding the general values of Moderns but having some capacity to see the point of the values of the other groups.. A fourth group that tend to be alienated, angry and disappointed in life; they think that they should be successful, should share in the abundance, but they don't; lower middle class.

### Traditionals

- Gives away more money than other groups and willing to do a good bit of volunteer work
- Tends to be more socially conservative than other groups; but includes New Dealers, labor union people, Reagan Democrats; includes two subgroups, one that is more politically and economically conservative often with an idealized view of a past America; much of the membership of what has been called "the religious right" comes from this group; the second and larger of the subcultures is less ideological, valuing a more traditional world, seeing the modern world as one that has damaged morals, stability of life, and the environment
- May be more inclined to seeing things as "right" or "wrong" than other groups
- Social class effects their approach – those from the middle class may be more inclined to be pro big-business; those of a lower income are more likely to be anti-big-business and sympathetic to green values.
- May hold strong family values, be inclined to trade off civil liberties for other values, be religiously conservative

### Cultural Creatives

- Approach health issues in more preventative and holistic manner than the other groups; don't reject traditional medicine but do make use of alternatives
- May be more driven to understand their work as a "vocation", not just a way to earn a living
- Higher value on altruism, volunteering time and civic involvement, having optimism about the future
- Tend to distrust big-business and reject the consumer – business culture; opposed to the "religious right"
- Consists of two subgroups – one that is more activist, has a clearly thought out world view, willing to invest in personal & spiritual growth, 67% of this group are women; the second subgroup is more focused on environmental concerns, especially the need for ecological sustainability

# Generational Cohorts

Generational cohorts are based on the assumption that people are significantly shaped in their values and ways of perceiving reality by shared formative experiences (such as World War II , Vietnam, the Great Depression, the Civil Rights Movement and Watergate, Woodstock, the invention of and mass use of television or personal computers.) Researchers differ on the exact years.

NAME [other names]	YEARS (US)	CHARACTERISTICS	EVENTS & PEOPLE
G.I. [Mature]	1901 - 1924	<ul style="list-style-type: none"> <li>• A time of international and economic uncertainty. They came together around their identity as "Americans."</li> <li>• Believe that hard work, discipline, and sacrifice are necessary for success.</li> <li>• Being an informed citizen is part of being an American.; heaviest consumers of news</li> <li>• The federal government supported its members with new programs 9e.g., New Deal, GI Bill).</li> <li>• Learned how to be a team player putting their trust in government, authority and community.</li> <li>• "Doers' and "believers," many achieved a higher standard of living and education than their parents</li> </ul>	Great Depression; World War II; came of age with greatest increase in schooling ever; John Kennedy, Ronald Reagan, Walt Disney, Judy Garland, John Wayne, Walter Cronkite;
Silent	1925 - 1942	<ul style="list-style-type: none"> <li>• Cautious, unimaginative, and silent.</li> <li>• Valued job security; only two percent were self-employed.</li> <li>• Earliest marrying group in American history. .</li> </ul> <p>Ninety four percent of women became stay-at-home mothers. Also start of the "divorce epidemic" as those born in the 30s and 40s showed the biggest age bracket jump in divorce rate. No fault divorce laws jumped from zero to forty-five states.</p> <ul style="list-style-type: none"> <li>• A generation without a cause.</li> <li>• Childhood memory's of World War II brought many to find a cause, e.g., Civil Rights, Peace Corps</li> <li>• Process driven, pluralistic.</li> <li>• Experts, caring, open minded; indecisive, guilt-ridden, neurotic</li> </ul>	<p>Children of war and depression; came of age too late to be war heroes and too early to be free spirits. Leaders as they grew up - Churchill, Roosevelt, (charismatic, inspiring, idealist figureheads)</p> <p>Colin Powell, Walter Mondale, Woody Allen, Martin Luther King, Jr., Sandra Day O'Connor, Elvis Presley</p>

Boomers	1943 - 1960	<ul style="list-style-type: none"> <li>• High self-esteem with self-indulgence; take good things in life for granted; have an expectation of prosperity</li> <li>• Saw role in society as to change and purify .</li> <li>• In the early 80s, some became self-absorbed "yuppies" with mainstream careers and perfectionist lifestyles. Others maintained their earlier commitments in their work and political involvement</li> <li>• In midlife many are focusing on values in the workplace and a "politics of meaning,;" seek purpose and personal fulfillment in their lives.</li> <li>• Autonomy; want to do it themselves, want to be individual.</li> <li>• More tolerant than other generations.</li> </ul>	<p>Grew up with parents dedicated to nurturing their success. Most had stay-at-home moms who relied on Dr. Spock (use reason in discipline; set up a democratic environment, taught to think critically, etc.) Vietnam; Cold War; International terrorism at a height. Leadership images - JFK, Robert Kennedy, Martin Luther King, Mandela, Malcolm X - Inspiring leaders moving people to a better future. Blunders (Bay of Pigs, Vietnam, Watergate) ended the awe and trust. Many leaders assassinated.</p> <p>Bill Clinton, Newt Gingrich, Steven Spielberg, Candice Bergen, Spike Lee, Bill Gates</p>
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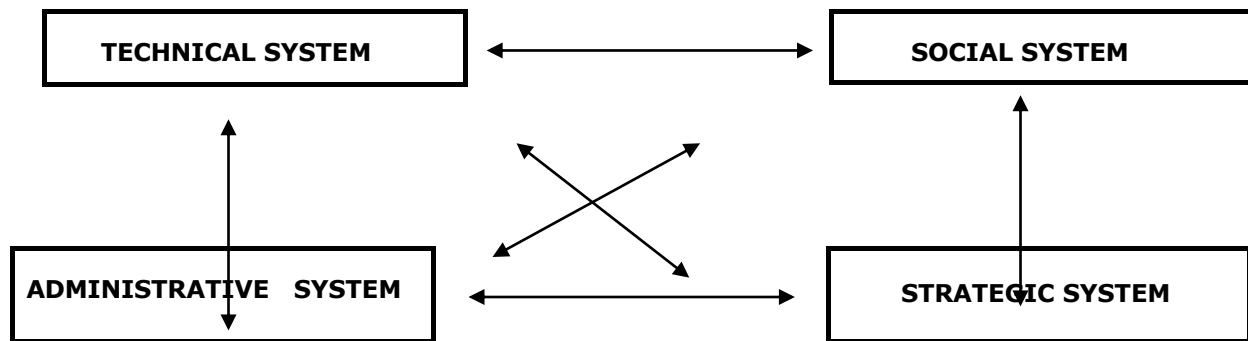
Gen Xers [Busters; "13 ER"]	1961 - 1981	<ul style="list-style-type: none"> <li>• Reaction against perceived hypocrisy of Boomers - be true to self - individual morality (work out ways to get around traditional morality)</li> <li>• Authenticity important</li> <li>• Both individualistic and invested in "community"</li> <li>• Older generations sometimes characterized them as irresponsible and reckless, only concerned about themselves. Xers find this view overblown and unfair.</li> <li>• Overloaded with information</li> </ul>	<p>Stock market plunge; Berlin war comes down, communism dies. In the news were Princess Diana (Princess of Wales) and Mother Teresa, Michael Jordan, Wayne Gretzky; Personal Computers; AID's</p> <p>Leadership images - Thatcher, Reagan, Bush, Gorbachev, Mitterand, de Klerk , Walensa</p> <p>Respond to leadership that is consultative, pragmatic and cautious.</p> <p>Kurt Cobain, Tom Cruise, Quentin Tarantino</p>
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Millennial	1982 - 2003	<ul style="list-style-type: none"> <li>• Optimism; a belief that the future will be better. But also the first generation to face a future that in which they are worse off financially then their parents.</li> <li>• Appear wise and grounded for their age.</li> <li>• Recognize problems in the world; want to improve things and correct wrongs in relationships and society. Tent to support government intervention to make life better (universal health care &amp; education.</li> <li>• Goal oriented and highly motivated toward success. Pleased with themselves</li> <li>• Planning for marriage and a family; most accept divorce as an acceptable solution for an unhappy marriage</li> <li>• Don't believe any political party has all the answers; uncertain about the direction America should take</li> <li>• Pessimistic about the performance leaders in government the media and other institutions</li> <li>• Searching for solutions</li> <li>• After 9/11 there emerged a significant interest among college students in working for the government (41 % would consider it, 75% saw government employment favorably). There was a significant difference among racial groups -- 51% of Hispanics (top), 49 % Asian-Americans, 40% blacks, 37% whites.</li> </ul>	<p>Wars in Yugoslavia- Czechoslovakia-Bosnia ; Many civil wars around the world (especially in Africa); Rise of China. Being treated as precious, important for the future</p> <p>Politicians and parents working to improve conditions so they may grow up in a nurturing environment. Parents are making a concerted effort to tell children to stay away from drugs, alcohol, profanity, smoking, and aggressive behavior. More attention to education. 9/11/01; corporate fraud; stock market trouble</p> <p>Leadership images - Major, Clinton, Blair - "mostly harmless"; not seen as having much power; not inspirational. Became very attracted to Obama as an alternative.</p>
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Robert A. Gallagher, 2001

## FOUR KEY SYSTEMS OF AN ORGANIZATION

Karl Albrecht's systems approach is the starting point in this paper. There are some revisions and additions to that work. Albrecht views an organization as a total, integrated system that is made up of four subsystems.



**The Technical System** -- Includes resources and the arrangement of those resources in the central process of the organization. The central process is directed at fulfilling the primary function of the organization. This system includes: the people directly involved in producing and making available the product or service, the primary facility, capital resources, raw material, the steps in the process of creating and delivering the product or service, operational methods, and standards of performance.

- **Key Measure: Productivity** in terms of the primary function.
- **Dimension of Health: Innovation** as seen in the practice of encouraging people to seek better ways for accomplishing results; tools, methods and, processes that facilitate innovation; rewards for innovative thinking and work; a broad interest in finding better ways in all aspects of the organization's life.
- **Related Management Competency: Problem solving** as expressed in the ability to think logically and flexibly and help others do the same.

**The Administrative System** -- Provides information that allows management to assess the overall health of the organization; helps everyone understand what is happening in the organization that influences them; and provides clear expectations. This system includes the processes and structures which enable an information flow that is timely and provides accurate and useful information. This system may include: system assessment tools; a feedback process that gathers concerns and improvement proposals; routine pathways in which information flows, routine media; and the people, facilities and equipment that are involved in information flow.

- **Key Measure: A response time** that moves information reliably, accurately, and quickly.
- **Dimension of Health: Adaptation** as shown in the organization's ability to plan and follow through on information.

- **Related Management Competency:** Administration as seen in developing and implementing structures and repeatable processes that help people communicate.

The Social System -- Includes everyone that belongs to the organization; the organization's values, norms for behavior, reward system, climate; how power and influence are structured and used; and the informal communication network.

- **Key Measure: The Quality of Work Life (QWL)** as expressed in practices and values that improve the well being, sense of satisfaction and commitment of people.
- **Dimension of Health:** A process of **graduation** in which the organization identifies and develops its future leaders.
- **Related Management Competency: Leadership** that facilitates people in moving toward the organization's vision, values and goals.

The Strategic System -- This is the steering function of the organization; the capacity of the organization to set a direction and navigate in that direction. It includes: the managers and others related to the strategic task; the processes of diagnosis, envisioning, planning, and implementing; the relationships, forms of accountability and collaboration, and values of leaders about power.

- **Key Measure: Management strength** as seen in the mix of skills that allow the organization to deal with changing conditions and opportunities and carry out the primary function.
- **Dimension of Health:** An **evaluation** process that regularly assesses the functioning of the organization and the environments in which the organization exists.
- **Related Management Competency: Strategy formation** in thinking through issues -- of purpose; the impact of trends and forces external to the organization; the organization's strengths, weaknesses and limitations; opportunities; and the direction to take that will help the organization adapt to the changing environment while acting effectively in its purpose.



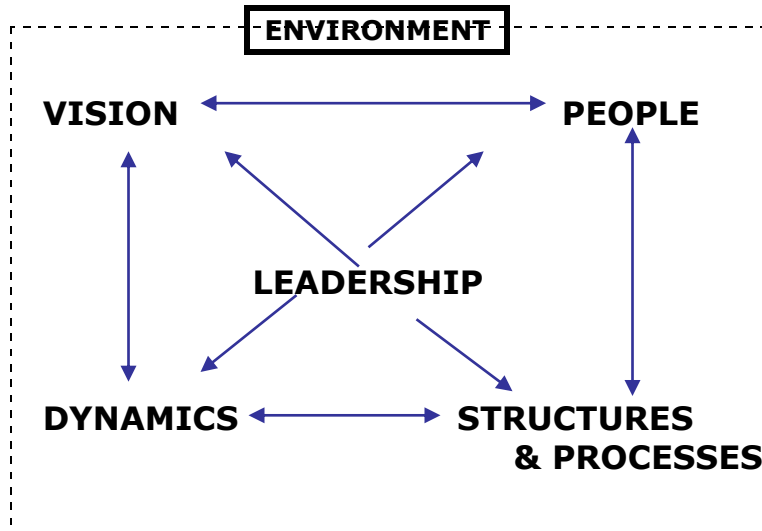
# Organizational Diagnosis: Six Primary Elements of the System

## A. VISION

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

## B. PEOPLE

1. Competence and commitment for the job and teamwork
2. 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, etc.
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

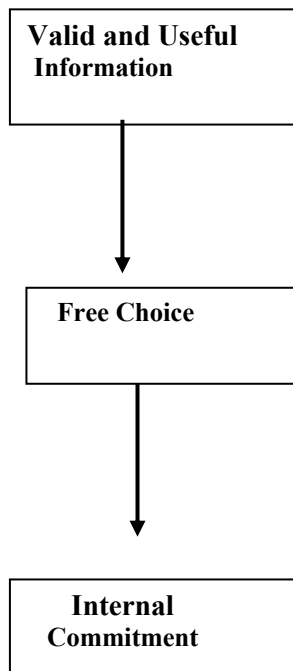
## F. ENVIRONMENT

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

G. **"FIT"** -- Identify areas where there is poor alignment, e.g., between core values and responsibility toward staff or the community.

# An Intervention Theory

The following is largely based on the work of Chris Argyris in *Intervention Theory and Method*. It can be seen as the underlying “process outcomes” the consultant is seeking in an intervention, i.e., valid and useful information, free choice, and internal commitment.



- Information that can be publicly verified; that can be tested with a broad range of people; that can be openly gathered and discussed.
- Is useful in the sense that something can be done with it to effect change
- The task is for the client to select the option with the highest probability of succeeding (within cost limits).
- The process needs to enable that choice to be:
  - based on an exploration of options
  - voluntary, not from habit or coercion
  - proactive, not reactive
- The target is for as many people as possible to have a high level of commitment to the option that was chosen.
- A high ownership and feeling of responsibility. That people are acting under the influence of internal decision rather than external forces.
- More likely to hold over time and under stress
- Open to re-examination (our commitment to “valid and useful information” may bring new information and new choices)

The theory assumes that one element builds on the other. The more the information is valid and useful, the more likely the free choice, the more there is truly free choice, the more likely there will be internal commitment.

The theory also assumes that the consultant is not just trying to help the client solve a particular problem or engage a specific opportunity; but is also concerned with two other matters:

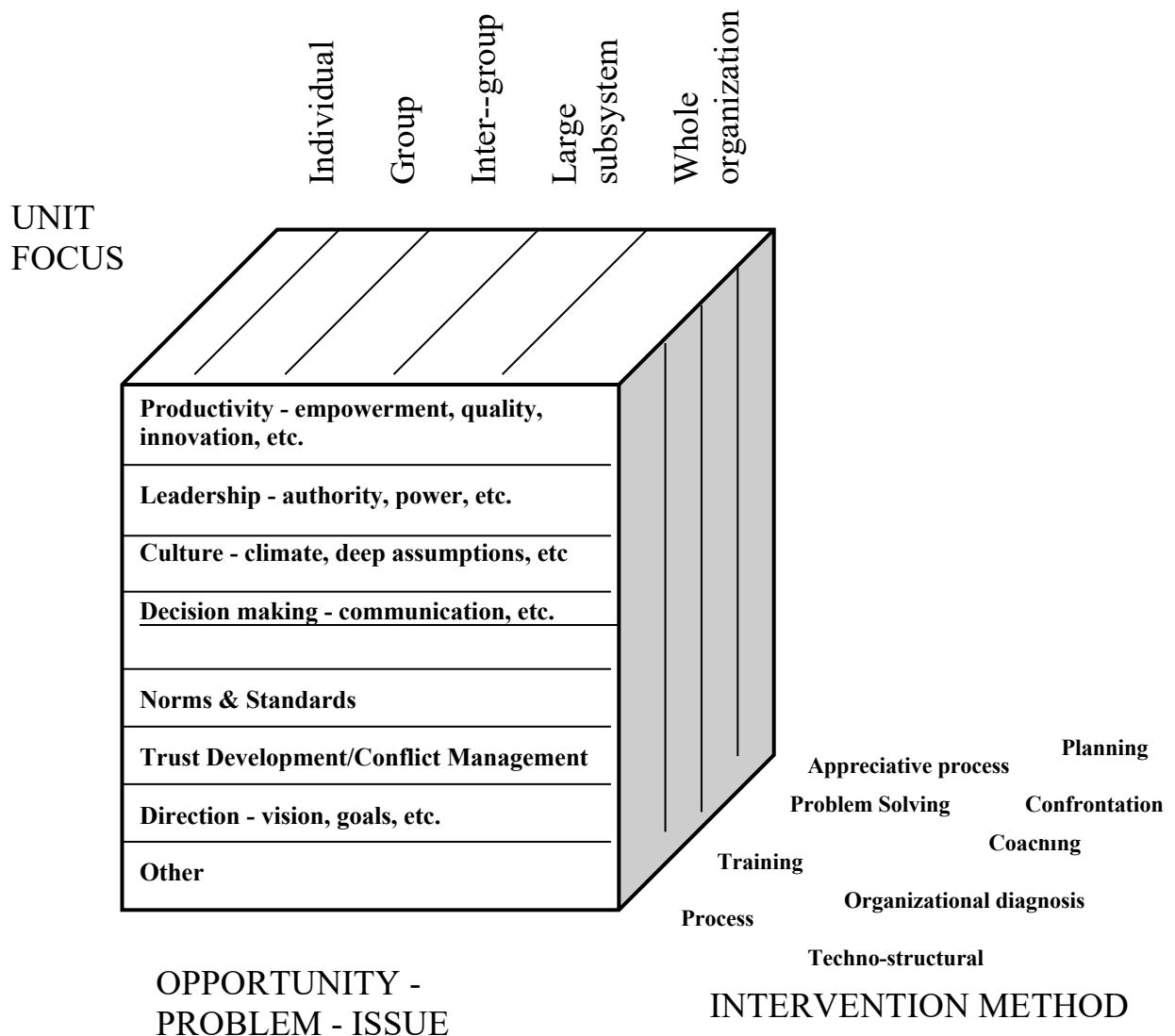
- that people end up with high internal commitment to the direction, and
- that the organizational culture is enabled to increasingly value and have the ability to generate valid and useful information, encourage free choice, and seek internal commitment.

There is a tension in an intervention between addressing the opportunity or problem at hand and pursuing the values in this intervention theory. Organizational leaders may decide to give more attention to one need over the other because of time limits, financial costs or due to holding different values

# Intervention Choices

OD practitioners are constantly making choices about interventions. Who to involve - just the leadership, a working group, everyone in the organization? What to focus on - the issue it would be easiest to make headway on or the most strategic opportunity? The style of work - do we take a problem solving approach or use some appreciative process? How deep shall we go - are we working on deep underlying assumptions about how we work and relate with one another or are we simply trying to get this problem behind us?

Various cube models have been used to understand the range of intervention options. Here's an example.



The use of a cube model is more to get perspective on your approach to interventions than it is as a planning tool. The model can help practitioners:

- Identify if they are using too narrow a range of interventions; suggesting they may need to expand their range. The concern here is that the practitioner may be relying on just a few familiar methods whether or not those methods fit the need.
- Clarify areas where they are especially gifted. It allows the practitioner to put a name to it, e.g., "I'm especially good at helping leaders develop strategies for marketing, culture change, etc."
- As a scanning tool when they are seeking a different approach in a particular case. It may stimulate thinking about options.

## Other forms of the cube model

- Robert Blake and Jane Mouton developed the "Consulcube" which has three dimensions and 100 cells of possible interventions. They look at 1. What the consultant does (e.g., catalytic, confrontation, etc.); 2. The focal issues (e.g., power/authority, goals/objectives, etc.); and 3. The unit of change (e.g., individual, group, etc.)
- "The OD Cube: A Scheme for Classifying OD Interventions" is the creation of R. Schmuck and M. Mills. They especially used it in relation to work with schools.

## Interventions

- All interventions will come within some form of the process of planned change (e.g., diagnosis, planning, implementation, and evaluation).
- There are a number of standard interventions in the field. Here are a few examples:

### **With Individuals**

- T-group
- Training & education to increase skills and knowledge related to the person's assigned task, relationships, decision-making, etc.
- Coaching, counseling
- Career/Life Planning

### **With Groups**

- Team building
- Process consultation
- Self-managing teams
- Role negotiation
- Action planning
- Skill training

### **Inter-group**

- Mirroring
- Process consultation
- Conflict management

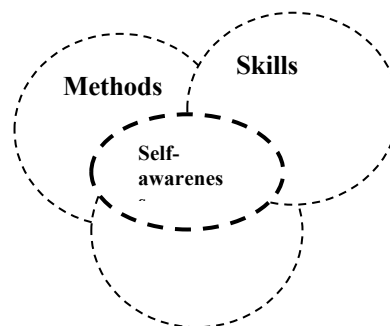
### **With the Total Organization**

- Visioning; Strategic planning
- Appreciative Inquiry
- Quality of Work Life programs
- Physical settings
- Training
- Parallel structures
- Techo-structural
- Employee/member involvement
- Organizational learning

## Practitioner Competency for Interventions

- The practitioner needs the capacity to identify when an intervention fits the situation and to implement it competently. It is also essential that the practitioner have the skills to modify standard interventions, and to create new interventions, appropriate to the need. Just using "off the shelf" interventions will prove to be inadequate. Training in design skills and intervention theory will provide two of the building blocks for developing interventions.
- The broader issue is that of the competencies needed to design and implement effective interventions. I'd suggest four areas of need:

- |  |  |
|--|--|
| 1. Self-awareness                        | This includes an awareness of: the impact of their behavior on others, their communication styles, how they deal with differences and resistance, openness, authenticity, etc. |
| 2. Theory                                | Practitioners need a theory base in group development, systems, interventions, etc.  |
| 3. Methods -<br>Structured<br>Activities | Small & large group processes; instrumentation; survey feedback, etc.  |
| 4. Skills                                | The ability to give & receive feedback; group facilitation skills; design skills, observing, listening, presentation skills, etc.  |



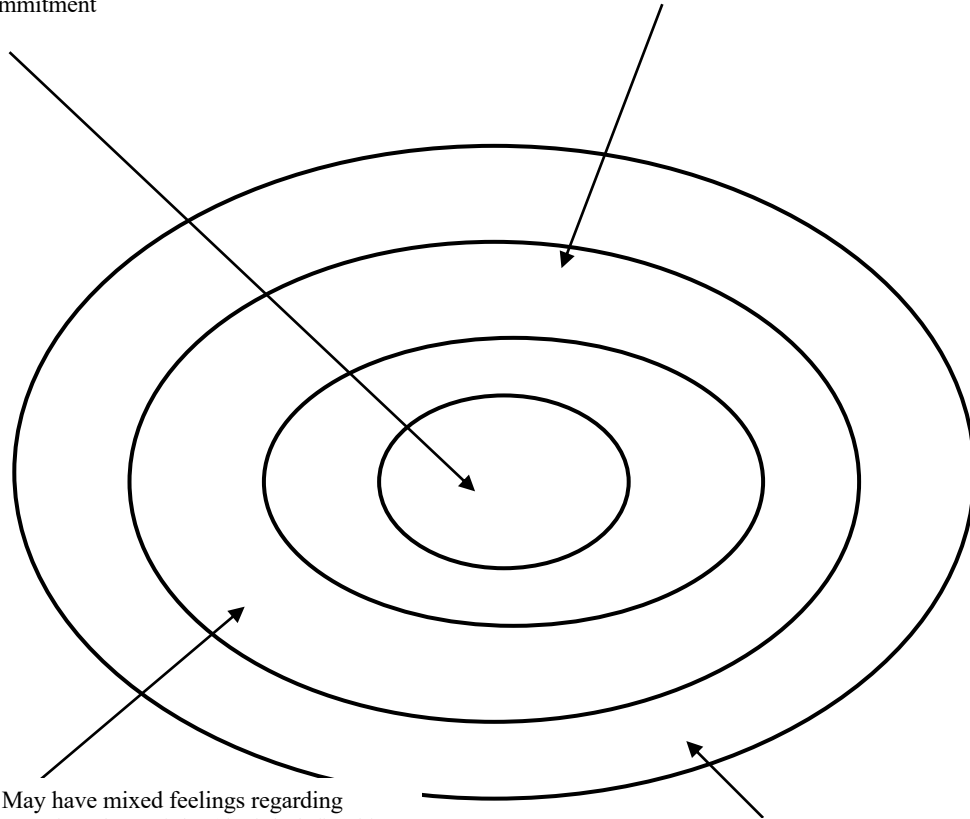
Making effective interventions is a complex process involving organizational purposes and needs, the organization's culture, and the competencies and values of leaders and consultants. The practitioner's awareness of the intervention possibilities is dependent on the depth and broadness of her or his competency.

# DEVELOPING CRITICAL MASS

This model is for use in an organization that is working to develop and maintain a productive and humane organizational culture.

**High competence and commitment:** People invested in all aspects of the organization’s life (teams, client/customer/ member service, organizational vision & values, self care and development, carrying out tasks specific to the position); high degree of emotional maturity, competence and commitment

**Supporters:** Not as invested as the core. Possibly somewhat less competence or commitment. Yet are “with you” in the effort. Are aware of organizational norms and have decided to cooperate with the norms and serve by use their competence



**“Just Going Along”:** May have mixed feelings regarding commitment; may want to “just do my job” (the job defined in very narrow terms); competence may be in limited areas; may “go along” with health or non-health at the center. People may be in this stance in some organizations while in others taking a *Core* or *Supporter* stance.

**Stances of Cynicism, Counter- dependency, Passivity :** Most organizations have people that are not able or willing to take a healthy and productive stance. This may be a stance that the person typically takes or may be situational. We are all here at times.

**STRATEGY:** In most organizations -- Build a “critical mass” of people with a stance of *High Commitment & Competence* and *Supporters*. Develop organizational processes, values and norms that reinforce a productive, empowering, and humane culture. Accept people in the stance they have taken; invite them to develop their abilities and willingness to invest themselves more broadly and deeply. Place boundaries on behavior that is undermining the well being of the organization’s culture.

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# DEVELOPING "CRITICAL MASS": AN ORGANIZATION DEVELOPMENT STRATEGY

## A. Build a Core of High Competence and Commitment

1. Be clear about who must be part of the core, e.g., key managers, organizational leaders, members of an internal training team, etc. People who by their position in the organization have significant influence on productivity and the organizational culture need to be part of this core group. Through training, coaching and hiring processes bring these people "on board".

2. Acknowledge and reward those who are in this group.

3. Provide regular training and coaching to support and develop them.

B. Focus on Developing and strengthening a "Critical Mass" of people with *High Competence and Commitment* and *Supporters*. Avoid getting caught up in trying to "fix" people in *Stances of Cynicism, Counter-dependency, or Passivity*. Do set boundaries on behavior that undermines what is healthy in the organization's life. Take a stance of accepting people in the stance they have taken; invite them to develop their commitment and competence, and to invest themselves more broadly and deeply.

## C. Develop Organizational Processes, Values and Norms that Develop and Maintain a Productive, Empowering, Humane Organizational Culture

Develop a clear vision that includes your mission, primary task, core values and broad direction. Create processes for organizational listening to its own life and the external context. Nurture a capacity to maintain organizational integrity while adapting to new forces in the organization or environment.

## D. Including Everyone

1. *Supporters* - Offer ongoing training and coaching; seek and encourage people ready to go further.

2. *"Just Going Along"* - All of us are in this stance in relationship to some organizations.

Include them in activities around the mission, core values, etc.; invite them to develop increased competency; engage them through the regular processes of the organization (not in special one-to-one sessions) --- listen to them in the processes of assessment/channeling/focus groups/MBWA ----> sharing the vision with them, saying to them what you need/expect -----> inviting them to move forward with the organization; do not over react to their low commitment or competence.

3. *Stances of Cynicism, Counter-dependence, Passivity* - Ignore their stance if possible;  
if the stance needs to be challenged engage people one-to-one by listening to their views ----> sharing your vision for the organization's direction and culture ---> invite the person to join in making the vision work; if their stance and activities threaten the organization's direction and culture seek ways to create boundaries that limit their influence in the system.
4. There may be people who appear to vacillate among stances, e.g., at times seeming to be *High Competence and Commitment*, at other times just *Supporters*. It may be possible to stabilize this by inviting the person to maintain a more consistent stance and offering help as required.

## E. Address the Situation if There is an Inversion of the "Emotional" System

If the emotional center of the organization is held by those with *Stances of Cynicism, Counter-dependency, Passivity* the task will be to displace those at the current center and establish a "critical mass" as described. Organizations or subsystems of organization can find themselves captured by a form of emotional coercion by people caught up in in one of these stances. Others who may be more committed, competent or emotionally mature back away from leadership.

## F. Decide on the Shape of the System that is Needed Given the Organization's Work

Most organizations can tolerate a certain amount of "*Just Going Along*" and a *Stance of Cynicism, Counter-dependency, Passivity*. You may not have the resources for consistently selecting or rewarding people of higher commitment and competency. Some organizations expect to include these people because of the mission of the organization, i.e. some religious groups. Other organizations have missions that require all its members to have high commitment and competence, e.g., Navy Seals, the bishops of a church.



# Organizational Culture, Contextual Issues, Organizational Self-Definition and Marketing

## BASIC ORGANIZATIONAL ISSUE



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## Sizing Up a Congregation

by Douglas Alan Walrath

One sure way to start an argument among church leaders is to advocate some particular way of categorizing congregations as the best! Each person will usually rise quickly to champion his or her favorite: theological focus, denominational affiliation, type of community, size of congregation--and so the list goes.

I must admit that occasionally I fall into that trap, though most of the time I remember that a better way to clarify the nature and significance of differences among congregations is to employ several frames of reference. Frankly, I don't believe anyone way of looking at churches is inherently better than the rest. Usually I employ several when working with a congregation for the same reason a physician uses more than one diagnostic tool. Each frame of reference yields different in- sights about why a congregation behaves as it does. So I choose the approaches that experience tells me will provide the particular insights I need to have.

I find church size to be one of the most useful frames of reference I can employ when I am seeking to understand the internal dynamics of a congregation--like styles church organization, leadership, communication and planning that are functional in that congregation.

For example, just before writing this article I reviewed the planning task force proposals of a very large, urban congregation with whom I will do some work in a few days. With supporting data the report contains nearly 100 pages. Their plans have already been a year in the making. A dozen obviously talented members of this congregation's planning task force have systematically and thoroughly studied their church and community; the carefully typed minutes they shared with me detail their year-long effort. Looking through their impressive work I am tempted to generalize, "That's the way planning ~ to be done! "

Yet, I know otherwise. While attending the annual meeting of another congregation I

witnessed an equally impressive, but very different approach. During consideration of the church's budget, the conversation strayed quite far from the printed agenda to a discussion of the widespread unemployment that afflicts the community served by this church of less than 80 members. It appeared that we were in for a long harangue as people shared their biases about the causes of that unemployment until one man suggested the church "do" something to attack the problem.

"Maybe some of those people who 'won't, work don't know how to work. Maybe they have never had the opportunity to learn. Why don't we employ some of them in our housing ministry this summer?" (This church participates in a ministry of building and improving homes for the poor, handicapped and other victims of misfortune in its area.) Within a few minutes (!) the congregation had agreed to try this approach, decided how to begin and who would guide the effort. Again I found myself saying, "That's the way planning ought to be done!"

The style of planning that will work best in a congregation is to some degree bound up with how large or small the church is. When we know what size a church is quantitatively speaking, we also know that we can probably draw some qualitative conclusions about the way people will tend to function in that congregation. In the table that appears on the next two pages I have outlined some of those conclusions as I found them to be present in congregations with which I have worked as a pastor, church executive and consultant. (For a more complete discussion see my book, *Planning for Your Church*, Westminster, 1984. Let me suggest some cautions to keep in mind as you use the table. The precise number of members I have indicated in connection with each size category can be misleading. Church rolls are notoriously inaccurate--especially in declining churches. The congregation you are seeking to understand may actually belong to a type group larger or smaller than its enrolled

membership would place it. So, it may be more helpful to begin by considering one of the functional categories like "key characteristics" or "typical planning style" to place your congregation in the appropriate group. When congregations change in size they tend to hang on to old ways of functioning. Thus a congregation that loses members may hold to an organizational style that is too complex and large in scale for its current needs; leaders may be unable to function effectively because so much of their energy is used up in maintaining an over-sized organization. By contrast, a congregation that grows in size often attempts to hold on to an informal organizationa1 style that inhibits its ability to develop the number and variety of program offerings its current membership needs. If your congregation has changed in size recently, are the ways you now function still appropriate?

Finally, avoid normative thinking--like "Bigger would be better." With congregations bigger is not necessarily better; neither is smaller. Big and small are simply different. Employing styles of functioning in various aspects of your church's life that are appropriate for a church of your size will enhance the effectiveness of your leaders--and the ministries and mission of your church as well.

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**NOTE:** CDI uses Walrath's approach to size for several reasons:

1. He focuses on characteristics and dynamics rather than numbers.
2. He doesn't bias the discussion with a view that some size is better than another.
3. He uses names for the sizes that are straightforward and clear. They are less likely than other models to imply that there is some "should" attached to your size (e.g, "Resource Church") or that uses images that may suggest things that the model isn't really trying to suggest (e.g., "pastoral" or "corporate").

There are modifications that might be made to the model based on:

- New Technology & Resources: For example, the communication pattern can be change because of the ability of even a small parish to use e-mail, e-lists, and web sites.
- Use by People in a Particular Tradition: For example, Episcopalians might note that the way clergy are often viewed in "Very Small" parishes is more in liturgical terms than as "preacher" or even "pastoral".

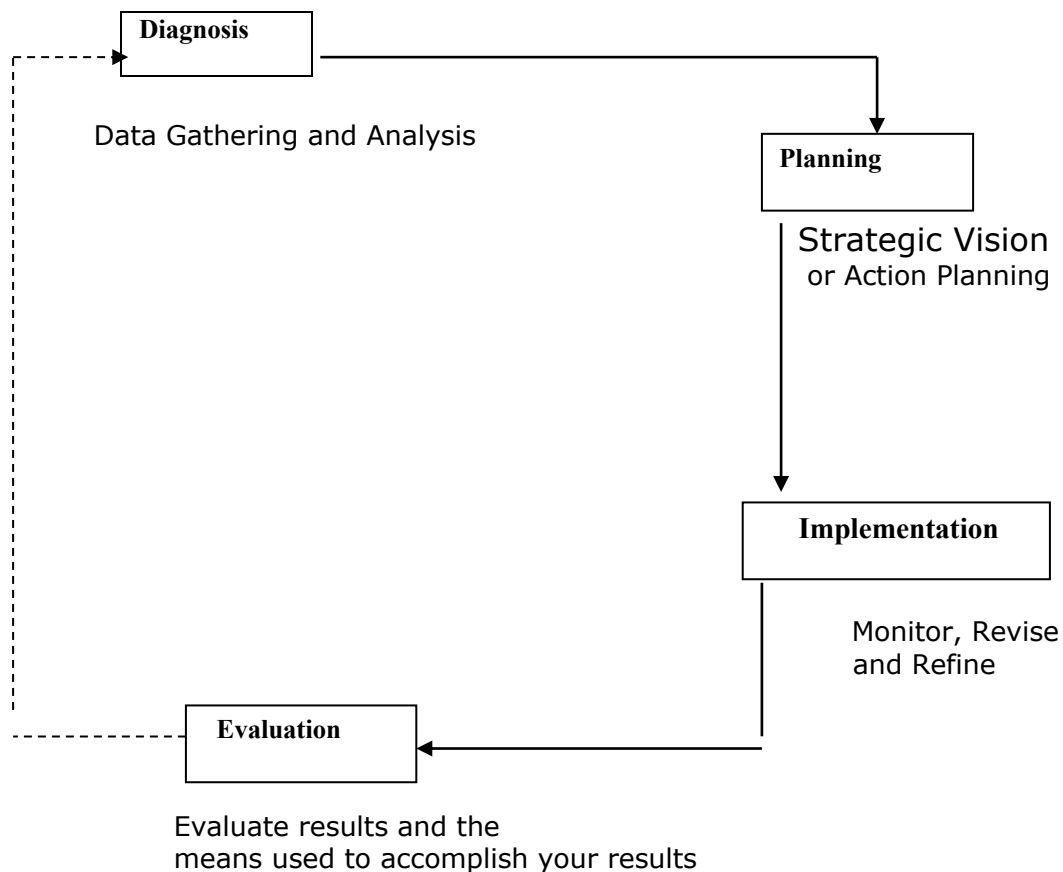
**See the chart that follows for Walrath's view of size categories and the impact that usually goes with a size.**

## Organizational Types Reprinted by permission from Action Information, Alban Institute Inc., Copyright 1985. All rights reserved.

Usual Size	<b>Very Small</b> [under 75 members; Aver. att: under 50]	<b>Small</b> [75-200 members; Aver. att: 40-100]	<b>Middle-Sized</b> [200-350 members; Aver. att: 75-200]	<b>Moderately Large</b> [350-800 members; Aver. att: 150-400]	<b>Very Large</b> [Over 800 members; Aver. att: over 350]
<b>Key Characteristics</b>	A tight-knit group	Familiar faces; dominant core group	Full-time pastor; full program	Diverse fellowship and program	Comprehensive program; specialized staff
<b>Definition</b>	A tight-knit group of persons who have regular interaction with one another; one or two extended families may dominate. Very small congregations almost always have limited resources. They must limit program to bare essentials, and/or cooperate with other congregations to provide a full program and pastoral leadership	A homogeneous group of persons who all know at least about one another, and who are dominated by a single core of leading members or families. Small churches usually have limited re- sources and must cooperate with others to employ clergy and to provide a full program.	A relatively homogeneous group of persons who function within several sub-groups around a single center; and who are economically self-sufficient, and able to provide a full program and support a full-time pastor.	A diverse association of individuals and groups sufficient in size to support a variety of programs that meet needs and interests both within and beyond the church membership. In addition to the pastor, the congregation usually employs at least part-time program staff.	A complex association of many individuals and groups who support a wide range of pro- gram, professional staff and facilities to meet their own needs and to reach out to others within the region the church serves.
<b>Typical Pattern of Familiarity and Interaction</b>	Members know and interact with one another regularly.	All members have current information about each other; a majority interact with one another regularly.	Pastor has current information about all members; a few members have current information about most members. A nucleus, often a majority, interact with one another regularly; the rest interact primarily within sub-groups.	Pastor has current information about almost all members. A core of members interact with one another regularly; a majority inter- act primarily within sub- groups	No single member or pastor has current information about all members. Regular interactions are confined largely to sub-groups, even during such large gatherings as worship services.
<b>Primary Organizational Roles of Lay and Clergy Leaders</b>	A few persons set the tone and direction of the group; often they hold the same offices and program responsibilities for many years. Roles of clergy limited to those functions prescribed by local traditions, required by denominational polity and deemed essential by local leaders. Clergy seen almost entirely in preacher-pastoral role.	Persons within the nucleus exercise overall control. Even when formal leadership posts rotate among church members, those with real influence remain constant, guiding forces. The same persons often carry the same program responsibilities year after year. Lay leaders, tradition and denominational polity set boundaries within which clergy must function. Clergy usually viewed primarily in a preacher-pastoral role.	Persons elected to board(s) determine policy and program, not, however, without the influence of a few respected leaders. Lay persons usually carry major responsibility for maintenance and finance, and share responsibility for program with pastors in other areas. Pastor usually expected to provide direct guidance in all areas	Persons elected to boards set policy and allocate program development responsibility to well-defined sub-groups whose work they review at stated intervals. Lay persons share responsibility for program delivery in many areas with pastor and other paid (usually part-time) staff. Pastor and other employed staff are expected to offer suggestions and guidance in their areas of expertise. Individual responsibilities are limited and defined.	Persons elected to boards and agencies set policy and direction. Various administrative, maintenance and program functions are assigned to sub-groups and usually coordinated by staff. Trained lay persons share responsibility for delivery of services with employed staff, with staff usually playing key roles in each area. Pastors and other staff are expected to offer expertise and guidance within areas assigned to them.
<b>Typical Communication System</b>	Word of mouth	Word of mouth, supplemented by print	Word of mouth within core group and sub-groups; print to reach others.	Generally by print; word of mouth within sub-groups and core group.	Generally by print and other formal means; word of mouth with staff and sub-groups.
<b>Typical Planning Style</b>	Spontaneous and informal; carried on within nucleus and based on data available to members' experience.	Usually spontaneous and informal; carried on by nucleus and based mostly on data available to members' experience.	Usually formal; carried on by board and pastor; sometimes with sub-groups. Based on data available in group and occasionally on research.	Formal; carried on by board and as assigned by sub- groups. Pastor and other staff participate. Data often gathered by research	Formal; carried on by sub- groups coordinated by board, occasionally aided by consultants. Data usually gathered through a formal research process.

# A PROCESS OF PLANNED CHANGE

The core process of planned organizational change can be described as four steps: diagnosis, planning, implementation and evaluation. It is an organizational improvement process.



To move through the steps or phases of the process you need to be clear about the scale and type of change being proposed. This sets the context for the whole process. Is this a long range attempt to change the service or product, increase productivity or transform the organizational culture or is this a more limited venture such as training employees to gather information from customers on the quality of the product and service, team building with a staff or enabling members to create their own discipline for self care or spiritual development.

It may help to identify what kind of planning will be used. That will shape the diagnosis step. Is this process to create an action plan for staff development, is it a strategic vision to guide the total organization for the next three years or is it an operational plan for the coming year.

In preparing to move through the phases of the process it may be helpful to use a chart.

Phase	How To Do It	Who To Involve	Schedule
Diagnosis - Data Gathering - Analysis			
Planning			
Implementation			
Evaluation			

Leaders have the primary responsibility for structuring, initiating and facilitating the process of planned change in the organization. Organizational leaders have the legitimate authority needed to launch a variety of planned change efforts.

The job of a consultant is to help the leadership facilitate the change process. The consultant may coach the manager, co-lead parts of the process or facilitate the whole process.

Internal change agents may be concerned with influencing specific parts of the process

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# Diagnosis

In the diagnosis step the organization is doing two things:

1. Gathering information
2. Engaging in an analysis of the organization's situation, opportunities, problems, etc. A target might be to identify the current situation, the desired situation and the forces involved.

## A. Gathering Information

### 1. **Methods of Data Collection**

- Interviews (group or individuals)
- Survey/Questionnaire
- Observing/Sensing/Intuitive "hunches"

### 2. **Use of a Model or Conceptual Framework**

Using a "lens" to gather information gives us a way to organize the information and identify patterns and issues quickly. A model might be used in the method of data collection or used to discern patterns from a more open-ended data collection process. It is important to fully understand the model being used and, to the extent that the model is normative, to be comfortable with the model's values and assumptions.

### 3. **Useful Information**

We are seeking information that can be used in the development of the organization. So, the information we gather needs to be:

- something the organization can use to effect change
- able to be shared openly; "confidential" information is rarely useful
- related to an area you are willing to make changes in, i.e., don't ask for information you are not going to be willing to act on.

## B. Analysis

### 1. **Use Models and Conceptual Frameworks**

Using models allows us to see a broader, more integrated picture. It may be helpful to use several models in developing your "hunches", "wonderments" and hypotheses.

### 2. **Explore Options**

Investigate the process/opportunities/problems. Avoid jumping to solutions. Create several approaches or possible solutions.

### 3. **Stance**

There are a few mental/emotional stances you need to take

- Participant/observer or Anthropologist
- Servant
- Loving critic of the organization (not unloving critic or uncritical lover)

### 4. **Attention to the Dynamics**

Assess issues such as:

- How open is the organization to its own information?
- How open are leaders/participants to hearing each other's information?
- How open are they to information about external forces?

- How open are clients with the consultant (if any)?

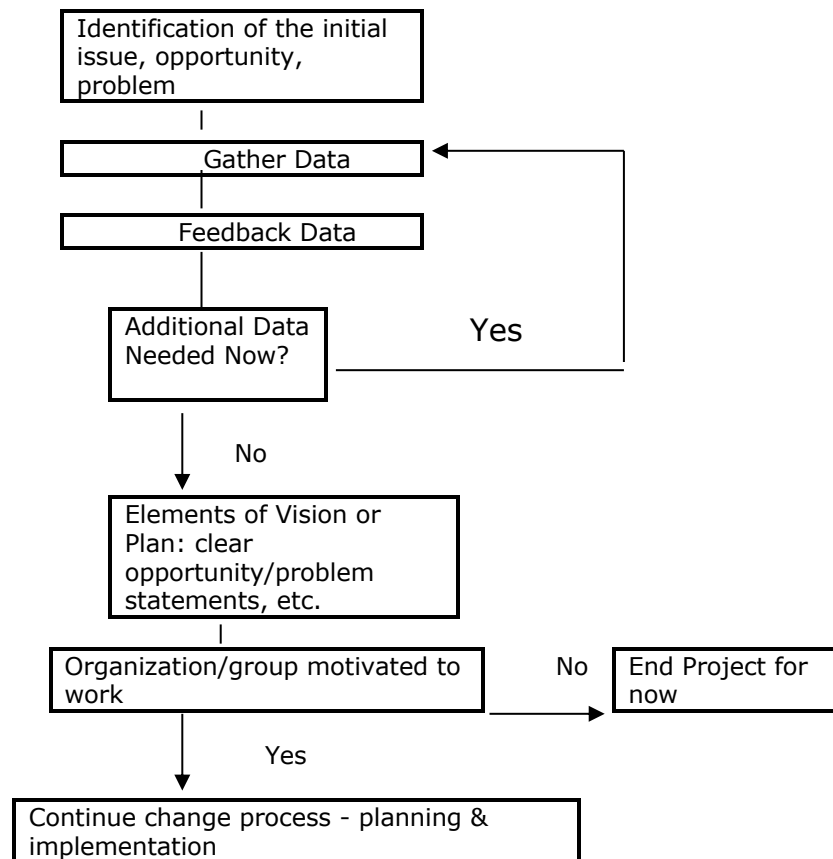
### C. Building the Organization's Capacity

Diagnosis is in itself an intervention in the organization's life. How it is done can help the overall process or set it back. Three actions that help people's sense of commitment, skill and knowledge are:

- Publicly sharing the information you receive.
- Teaching conceptual models you are using in the analysis.
- Inviting people to join in shaping the information gathering and analysis process.

### D. "Let the Data Speak"

Diagnosis involves data gathering; the interpretation of the information, and the identifying of developmental projects, strategic visions, goals, problems to solve, etc. The commitment of people in the organization to the change effort is critical for success. Is the data compelling? Will it motivate people? Diagnostic feedback is intended to increase readiness for strategic change and incremental improvement.





# PLANNING

## A. Objectives

1. Planning provides a sense of direction for the organization. It can motivate.
2. Planning gives shape to that direction through images and action statements.
3. Planning is an educational tool. It can help unify an organization.

## B. Moving from diagnosis to planning

1. Sense of direction and priorities -- Your diagnostic work needs to be given focus in a set of statements that define an overall direction. It is a statement of what the organization will be and do.
2. Format -- Decide on a format for the written statement, e.g., mission statement, vision statement, strategic plan, project or program description, etc. Select categories to use for organizing your work. (See materials on "Outlines of Strategic Vision/Plans" and samples.)

## C. Explore Options and Likely Consequences

1. It will produce a sharper sense of direction if there is an exploration of options for the vision, goals, strategies, solutions, project, etc.
2. At various points in the process, it is useful to project out likely results and consequences of a direction. How will it impact various subsystems of the organization? What role will each need to play? How are people likely to be affected? What is their likely response?

## D. Revisit the Question of the Type of Planning

What kind of planning is involved in this situation? A strategic vision or plan, a program plan, an organization development project/intervention, yearly working objectives, etc.

## E. A Strategic Vision

There are a variety of ways in which a vision might be created and drafted. Visions may be broad descriptions of an organization's hoped for future or more detailed presentations of how we will look and be in the next few years. Some visions draw more on images (e.g., "partnerships"), others on more of an icon (e.g., who the founder was, what the founder said.) Strategic visions may be most useful if they:

1. Include both what we are going to accomplish in production or service and who we are going to be.
2. Express the best values, hopes, and ideals of people with a stake in the organization.
3. Describe the organization at its best.
4. Show a gap between what "is" in the present and what is hoped for in the future.

5. Is grounded in the past and present life of the organization. If it is to be a vision and not a fantasy, it needs to be grounded in the history, strengths, weaknesses, and opportunities of the organization.

Visions can especially be a tool to enable:

- Self management -- Individuals and teams can use the vision as a guiding resource that can be used to align their work to the larger organization and other working units.
- Commitment -- Visions are meant to engage our passion and increase our commitment.
- They need to be exciting, to get us going.

In the September - October 1996 issue of Harvard Business Review, James Collins and Jerry Porras wrote about "Building Your Company's Vision." Here is their opening sentence: "Companies that enjoy enduring success have core values and a core purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world." They present an approach to vision that proposes two major components:

1. Core ideology consisting of -
  - Core purpose, reason for being, e.g., to preserve and improve human life; to make people happy
  - Core values which are few in number and stand over time, e.g., honesty and integrity, social responsibility, etc.
2. Envisioned future -- which is a picture of what we want to become or to create and which will require significant change in the organization. The suggest or envisioned future that includes
  - BHAG's (or Big, Hairy, Audacious Goals) -- this is making a commitment to a clear, compelling, 10-30 year, huge challenge that will both engage people's imagination and change the organization's life
  - Vivid Description which creates a clear picture of the BHAG in people's minds

Another approach to envisioning is to create a statement with a three to five year time frame that includes:

- Mission -- the business we are in now
- Core Values -- which guide long term life and direction
- Goals -- to achieve in the next few years related to productivity
- How We Will Live Together -- statements that describe the quality of life we seek together

## F. Strategic Planning

As with strategic envisioning, the concerns are long range, systemic, significant capacity building or a crisis that threatens survival. In practice, there may or may not be much of difference between strategic envisioning and strategic planning. It is usually a mistake to expect hard and fast definitions here. Planning manuals seem to differ in their defining of planning tools and concepts.

Planning usually implies more attention to establishing long range goals and objectives. In this case goals being broad statements of results or outcomes and objectives being aspects of a goal that are stated in a clear, measurable and time limited manner.

In strategic envisioning or planning, it is important that the top leadership be directly involved in drafting the final document. This is a way of requiring leaders to think through, integrate and own the direction.

## G. Operational Planning

Operational planning is used to make a strategic vision or plan operational. In the absence of a long range vision or plan, it may simply be an organization's annual planning process which establishes the yearly activities for an organization.

Operational planning usually takes one of the following forms:

Annual plan -- Specific goals and objectives set to help the organization move toward its strategic vision or plan during the coming year.

A five year plan -- Or it may be a three or four year plan. Some organizations like to work out a detailed year-by-year plan for moving toward their vision. If it is anything more than collected thoughts to possibly use in future years, it has the danger of locking the organization into too much detail and producing an inflexible response to changing conditions or needs.

Team planning -- Have each team or department do a yearly plan that is responsive to the overall vision/plan.

## H. Organization Development Intervention/Project Plan

This is an action - plan (see "I") for an OD intervention/project. It might be an action plan for team building, conflict management, trust development, training in problem solving methods, training team facilitators, an action research process (in itself a form of the process of planned change), leadership coaching, intergroup cooperation, etc.

## I. Action Planning

Action planning is used for taking quick action on a project, program, intervention, etc. Useful questions and method may be:

- What are the first three steps we need to take?
- What is something we can do in the next few days to move this along?
- Using force field analysis as a strategic formation method.
- Deciding on a general course of action along with the sequence and timing of steps.
- Use a chart.

Action	How	When	Who	Resources

# Implementation

Implementing the plan is a time of transition into a new way, a new state of being for the organization. Managing that transition is the task.

## Stay Focused on the Vision-Goals-Direction

The primary aspects of the plan need to be kept in front of the organization – post it, frame and hang it, expect people to know it, have leaders present it again and again.

## Leadership

The leadership task includes:

- Keeping the new direction in front of the organization
- Showing commitment oneself (including dealing with one's own internal resistance to the change or one's role in facilitating the change)
- Asking others to commit themselves.
- Managing the political process involving various interests affected by the change.

## Monitor the Process of Change

1. The organization needs a way to monitor the change process. This might include
  - Providing time at the board or management team meetings to review progress.
  - Having a team gather information and propose adjustments.
  - Using a consultant to work with key leaders in reflecting on the implementation process.
2. Monitoring during implementation is an early form of the evaluation stage. You want to review all of the same issues you will deal with during the evaluation.
3. Many difficulties in the implementation phase can be traced to unresolved issues in earlier stages of the process, e.g., not involving relevant people in the entry or diagnosis steps.

## Communicate – Communicate – Communicate

The implementation phase is a time to over-communicate. Keep repeating the vision, why we are making these changes, what is being changed, and what is not being changed. (People cope better if they know some things will remain stable, for now.) Provide regular updates on progress and difficulties.

## Include People

Include people in implementing the plan. This can help reduce resistance, increase commitment, and provide needed creativity and energy. Leaders need to seek ways for people to play a role in the new direction.

Care needs to be taken in regard to the few people who are unable or unwilling to collaborate. Leaders need to beware of the danger of getting drawn into an emotional drama in which they try to convince or even force the strongest resisters to join in the effort. The whole organization can be held hostage to the sabotage of a few people. While leaders work overtime trying to bring them along, the organization remains stuck.

## Help People to Define Success

Defining success during the implementation stage is critical to helping people stay motivated. For that to happen it's important to take initiative in defining the signs of success at this stage.

- Acknowledge publicly each movement toward the vision, each event that advances the new direction.
- Be clear that success does not mean fewer issues, problems or opportunities to deal with, but new and different ones. Remind people of this process. As old issues fade and new ones emerge, hold it up as progress.
- Success will mean an increase in our standards, expectations and hopes. This is likely to show itself as an increased dissatisfaction with the organization or the progress being made. Also there is a phenomenon noted by Maslow of complaining shifting from "grumbles" about small things to "meta grumbles" about broader, long term issues.

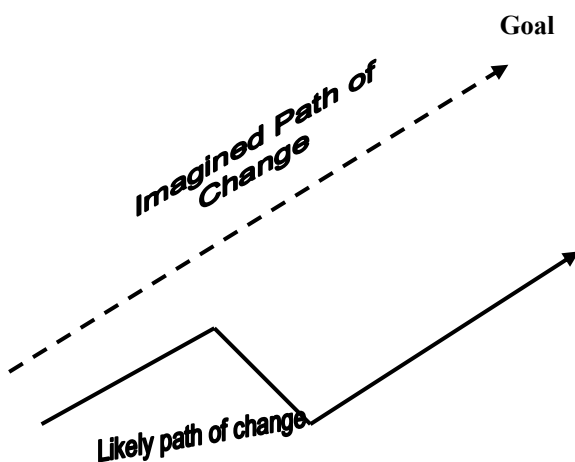
## It Will Not Go the Way You Imagined

Implementation will not go the way you imagined it would. Even if leaders have told themselves this "truth"; it will still come as a shock to experience the confusion, resistance, anxiety, slowness, twists and turns and unanticipated consequences of the change process.

One way of understanding what is happening is the "nose-dive syndrome"; another is in terms of resistance to change.

### *Nose-dive Syndrome*

Karl Albrecht suggests that there is a "nose-dive syndrome that frequently happens when implementing major change. It goes this way – the leadership assumes that all will go well



in the change effort. In fact things get worse. People resist, grumble, fight and generally play the victim or cynic in regard to the proposed change. Resources that were to be available are slow in coming. Key people get caught up in other demands and give less attention to the effort. Productivity and employee or member satisfaction declines instead of improves. The nose-dive doesn't always occur, but when it does, the organization's leaders face the choice:

“this was a mistake; we misjudged what was possible” or

“our reading of the situation and the possibilities is mostly correct; there will need to be some adjustments; but if we stay with it we will reach the hoped-for results.”

## Resistance to Change

Resistance is likely as changes begin to take shape and impact people's lives or that impact is anticipated. What may have been a vague uneasiness earlier becomes a fear of loss. Some who were initially in favor of change may become restive. The sources of resistance are likely to be multiple – social networks are disrupted, influence patterns change, reward systems are rearranged, there may be a sense of uncertainty about the future. The organizational culture – “the way we are and how we do things here” – may be seen as threatened.

Resistance will be reduced if the issues identified earlier are effectively addressed, e.g., clear vision/direction, leadership, a monitoring/management process, communication and including people. It is also important to listen to the resistance. There may be information in the resistance that can improve the change project.

## Reinforcing and Stabilizing Change

Systems have a tendency to function like rubber bands. They are stretched under pressure, once the pressure is released they snap back to the original shape. Organizations tend to revert to old behavior patterns unless efforts are made to institutionalize the changes. For example:

- Have a team continue monitoring and reinforcing the change.
- Key leaders need to “check in” occasionally on how well the new ways have become part of the organization's life.
- Train people in the skills and knowledge needed to competently function in the new way.
- Provide adequate resources.
- Change related policies and practices.
- Reward teams and individuals for making the new way work.
- If necessary, remove extreme resistors from positions of influence.

# EVALUATION

## Evaluation Objectives

1. To see where you are and what to do next
2. To assess the effectiveness and value of the process you have completed
3. To learn from your experience, e.g., to increase your skills and knowledge for managing a change process
4. To help people in the organization integrate the changes that have taken place

## What to Evaluate

(This should have been determined in the planning stage.)

1. Movement in terms of the planned outcomes (goals, objectives, hoped for results, etc.)
  - Improved, worst, the same?
2. The process of planned change
  - Diagnosis, Planning, Implementation -- how well did we do in each stage?
3. You might use a system diagnosis tool in reflecting on your work
  - For Example: Use "Six Primary Elements of the System" -- Vision, People, Dynamics, Structure & Processes, Leadership, Environment
4. If a consultant was used -- Develop a mutually agreeable way to assess the consultant's work.

## How to Evaluate

- Decide on ways to gather information, ie, interviews, survey, observations/sensing.
- Decide on who to involve -- Who will need to act on the results?, Who would you like to be influenced by the evaluation process and results? Who might provide information or opinions? Who might best interpret the information and draw conclusions on behalf of the organization?
- Decide on who should see the results.

## Next Steps

The evaluation team needs to look at two follow through areas.

1. What do we need to do to continue reinforcing and stabilizing the change?
2. Is this the time to terminate (for now) the formal process of planned change? Or, does the evaluation suggest the need to return to an earlier stage for additional work?

## Celebration

Take time to celebrate what has been done together. Acknowledge special efforts and contributions to the work.

# COMMUNAL DISCERNMENT

Communal discernment is the process by which a community of faith seeks to see God's movement in the world and in that community's life. It is our attempt to see "rightly." To see our experience and our goals through the eyes of Christ. It is our striving to listen deeply and grow in our conformity with God's love for us.

## **Three Assumptions**

1. Communal discernment is directly related to our efforts for congregational development.
2. Communal discernment is happening in all Christian communities. It may be more or less skilled, grounded or intentional in various communities.
3. Our discernment is only confirmed over time. It is confirmed by the experience and acceptance of the community.

## The Parish Base for Discernment

Communal discernment is both about particular decisions and processes the community is facing and is also about a general stance and capacity of the community. In fact, the more solid that stance and capacity, the more likely a productive and faithful outcome in particular decisions and processes.

We need to engage in the long term development task of preparing the ground for fruitful discernment. Some aspects of that preparation are:

1. The congregation's living a full, rooted Christian life of worship, doctrine, action and oversight; a functioning Renewal-Apostolate Cycle, etc.
2. Building awareness in the congregation of having a nature and mission as a local expression of the Body of Christ, i.e., one, holy, catholic, apostolic; restoring to unity. Of how this is seen in the parish's history and current life.
3. A shared understanding of our common faith journey. Including a broad overview of the story of the people of God (biblical and historical) and the story of the parish.
4. Having shared our own story of faith and having heard the stories of others in the parish.
5. Having some common language and frameworks for understanding the parish's dynamics, essential elements, and primary task.
6. The ability to listen -- to God, self, others, creation; to be still and silent when together in worship or meetings. This involves a letting go of our insistence on our own views and giving the time and patience necessary for the



Holy Spirit to lead us.

7. An ability to relate well with one another, e.g., mutual respect in meeting and worship behavior; not ongoing grudges, old struggles operating just under the surface.

8. A sense of stability and openness to change in parish life regarding worship and meetings for decision making, problem solving and planning.

9. A number of people in the parish with some depth to their faith and life, i.e., apostolic faith and practice.

Out of this "base" may come a living in Christ and Christ living in us; a flowing forth of Christian thinking and deciding.

To the extent that the base for discernment exists in the parish, all of our thinking and deciding will be influenced by the heart and mind of Christ.

## Discernment in Particular Decisions or Processes

1. If the parish is engaged in a process of planned change that will result in a parish vision, plan, new program, etc., specific discernment methods can be woven into the overall process, e.g., a) a reflective review of parish history seeking to see patterns of grace and sin; of death and resurrection; of stability, conversion and obedience, b) times of silence, c) intentional community building by faith sharing, team building and social activities.

2. For a decision on an especially important matter, it may involve one session or go on over several months. In a context of community worship, community building and faith sharing, there needs to be a disciplined process that enables people to deal with the specifics of the issue:

-- a clear defining of the issue, problem, or opportunity that is put forward as a proposal to be heard, explored and prayed about

-- a careful, open listening to one another in which the reasons for and against the proposal are listed

-- seeking areas of agreement

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# ORGANIZATIONAL CULTURE

Organizational Culture is:

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

## Examples of Organizational Culture Expressions

Open <-----> Closed

Authoritarian <-----> Democratic

Trusting <-----> Suspicious

Competent <-----> Not competent  
(in the individual or team) (needs tight supervision or work that doesn't matter)

Cooperative <-----> Competitive

Vision <-----> Details

## Creating Culture

- Interaction regularly over a significant period of time
- Relatively successful in what they are doing
- Patterns of behavior and solutions that seem to work to become a culture
- Leader / founder is primary shaper
- Issue → defining success

## Early Growth

- Evolution (incremental change)
- Insight through organization development and coaching/training to build behaviors/climate and intentional envisioning, values work, etc.

## Midlife

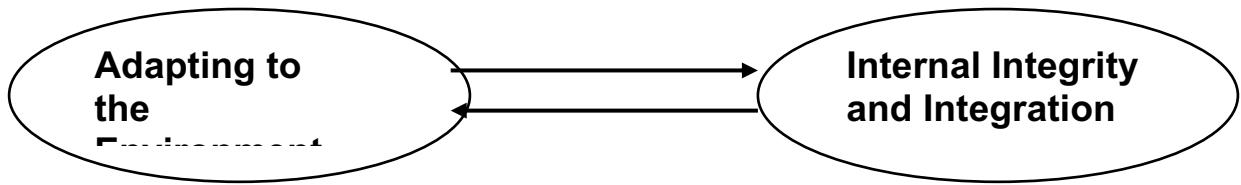
- Systematic promotion of people
- Planned change - OD projects, parallel structures

## Decline

- Infusion of outsiders
- Scandal or myth explosion
- Coercive persuasion
- Death --> recreate something in its place

## THE PRIMARY ISSUE

The need of the organization to do two things



Is about "success"

Environment has impact

Listen, understand,  
respond

Response is - where to  
go? How to get there?  
Needs consensus

Leaders -

- success at this or "out"
- so how to define  
"success"

Common language

Boundaries

Influence

Intimacy

Rewards

Myth

## The Research: What does it say?

Which elements are primary? Which are secondary?

[Circle those you think are primary in shaping organizational culture]

Organizational structure

How leaders react to critical incidents and crises

Rites & rituals

Physical space

What leaders pay attention to, measure, work to influence regularly

Statements of belief, values, etc.

Stories, myths

Role modeling, teaching, coaching

Observed criteria by which leaders allocate rewards

Observed criteria by which leaders allocate scarce resources

Observed criteria by which leaders recruit, promote and exclude

# Troubled Organizational Cultures

According to Deal and Kennedy

## **1. An Inward Focus**

Not paying attention to contextual trends and forces

## **2. Short Term Focus**

Need adequate time on strategic issues

## **3. Morale Problems**

People are chronically dissatisfied, feel like victims; high turnover

## **4. Fragmentation/Inconsistency**

Different standards regarding dress, speech, work, etc. for groups of people. They do not come together when common effort is needed.

## **5. Emotional Outbursts**

Anger, a pattern of crisis – drinking, couple in trouble, health issues

## **6. Subculture Issues**

- Subcultures ingrown – the needed regular exchange across subcultures does not take place
- Subcultures clashes surface – different subcultures try to “outdo” the others
- Subcultures become exclusive
- Subcultures preempt shared organizational values

# The Organizational Culture of Anglicanism

Anglicanism has a culture, an ethos. The interest of congregational development is:

1. How that culture shows itself in parish churches
2. How that culture is responsive to the influence of the social culture in which it exists.

What follows is a taste of the organizational culture of Anglicanism. Please understand that these are shortened statements of the writers more complete view. Participants may benefit from reading the full text.

From *The Anglican Way*, James Fenhagen, Forward Movement

1. **Comprehensiveness** -- "rather than doctrinal uniformity ...being able to hold together seeming opposites"
2. **Personal Holiness** -- "emerging from the inter-relationship between liturgical participation, solitude and compassion ... weaves together a concern for personal freedom with an emphasis on beauty and joyfulness and awe"
3. **Holy Worldliness** -- "life affirming rather than pleasure denying...; calls people to faith not out of guilt or fear, but of a vision of God.."

From *A People Called Episcopalians*, John Westerhoff, St. Luke's, Atlanta.

Describes Anglican Spirituality as having these characteristics:

1. **Liturgical/Biblical** -- "rooted in communal daily prayer ... intended to shape our relationship to God"
2. **Communal** -- "communal prayer always comes before personal prayer, which is to be shaped by communal prayer ... before decisions are made ..the community gathers in the context of communal prayer and meditation on the Scriptures so that the Holy Spirit might inform and influence our decisions"
3. **Sacramental** -- "outward and visible signs of inward and spiritual grace ...informs our conviction that just as Christ was the sacrament of God, the church is called to be the sacrament of Christ in the world ...implies that our spirituality is political, combining both the contemplative and the active"
4. **Pastoral** -- "our relationship to God is measured by our relationship to our true self, all people, and the natural world"
5. **Incarnational** -- "emphasis on God's entry into human life .. has resulted in an earthy spirituality ... affirm life in this world and believe that the body, pleasure, and material reality are fundamentally good"
6. **Mystical** -- "emphasizes a long slow journey into union with God"

Describes Anglican temperament with these characteristics:

7. **Comprehensive** -- "truth is known and guarded by maintaining the tension between counter-opposite statements concerning truth ...personal freedom and communal responsibility, ...sacred and secular"
8. **Ambiguous** -- "living with what may appear to be irreconcilable differences ... tolerate theological and ethical messiness ... wait patiently ... pray with a discerning heart, and to listen with an open mind"

9. **Open-minded** -- "encourage a searching, questioning, reasonable mind always open to new insights and change"
10. **Intuitive** -- "prefer art to philosophy and are more at home in the world of symbol, myth and ritual than systematic theology"
11. **Aesthetic** -- "Truth, goodness, and beauty are related to each other in that the presence of one is judged by the presence of the other two"
12. **Moderate** -- "model a temperate, balanced, reasonable approach to life. It is a life in which prayer, work, study and play have a rhythm"
13. **Naturalistic** -- "reverence for and take delight in the natural earthy rhythm of life ... contributions of natural sciences... using live flowers, real candles"
14. **Historical** -- "learn from a careful reflection on the past ... strive to maintain our roots"
15. **Political** -- "affirm free, peaceful, public debate as a basis for political unity ... church should influence social, political, and economic life"

From *What is Anglicanism?*, Urban Holmes, Morehouse Publ.

Holmes sees Anglicanism as "a unique way of looking, making sense and acting in the experience of God .. At its best in liturgy, poetry, music and its life" not in writing great theology. Note characteristics such as:

**Sensibility** -- taking into account the whole of experience, ambiguity and all

**Mystery of the ordinary** -- in that the extraordinary shines through in the ordinary

**Feminine** -- comprehensiveness, darkness and light

In *The Anglican Vision*, James Griffiss, Cowley

He speaks of -

- **Tension of continuity and change**
- **Incarnational**
- **Roomiest church** -- tolerant of doctrinal differences and a diversity of practice

In *The Future of Anglicanism*, Robert Hannaford, ed., Gracewing, Leominster, Herefordshire Paul Avis notes -

- **Affirmation (of central truths) and restraint**
- **Practical not speculative faith**
- **Liturgical rehearsing of faith**

In *The Renewal of Anglicanism*, Alister McGrath, Morehouse He notes -

- **Live with differences**
- **Dynamics among:**
  - Mainline: Apologetics** -- to make Christianity credible and relevant
  - Evangelical: Evangelism** -- vitality of the Gospel
  - Catholic: Spirituality** -- resources needed to grow in faith

Robert A. Gallagher, 1999



## Episcopal Spirituality

The Episcopal Church has developed a particular form of Christian spirituality that has emerged from its roots in Anglicanism and in the American experience. That spirit can be found in most parishes and dioceses of the church (but not all). What follows is just one attempt to describe that spirituality.

### A Christian Spirituality

Grounded in the love of God for humanity as seen in the incarnation of Jesus Christ. Christian Life is life lived in Christ: "Christ in us and we in him." Worship, doctrine and action are the means by which we participate in the life of Christ's Body, the Church; in her unity, holiness, catholicity and apostolicity. They are the means by which we participate in the Church's mission, "to restore all people to unity with God and each other in Christ." We are restored to unity as we are drawn into the prayer of Christ, the mind of Christ, and the work of Christ. In prayer, study, and work we become instruments of God's holy mission.

### A Spirituality of Beauty

We tend to take delight in the natural rhythm of life. We rejoice in the beauty of creation and have a strong commitment to environmental protection. Our worship strives for good music, a sense of flow and grace, and poetry and drama. We seek beauty in our worship space using artists, live flowers, and real candles in creating an appropriate climate.

### A World Embracing Spirituality

- Our tendency is to **affirm life and this world**. Those things in life that give us pleasure are understood as being fundamentally good. Fun, our bodies, material things, good food are all accepted as part of living a full life. Our call to faith is linked to hope and love rather than fear and guilt.
- For most of us the **Christian life is lived in the context of our family, work and civic life**. Those are the places in which the love of Christ may flow through us to offer light and hope in the world. We generally see that process as organic rather than planned. To the extent we have been touched by the love of God we will show that love in our daily life.
- We see Christian faith as **having political implications**. Episcopalians have a long history of involvement in the civic life of communities and the nation. The individual Christian is called to both inform and act on their conscience. The church doesn't usually ask its members to accept particular political views but it does ask members to consider in their thinking process what might be understood from the Scriptures, what the church has learned over the centuries (as seen in the Tradition and the contemporary councils of the church) and in their own Reason. As a church we take positions on public issues. Those positions are usually on the liberal side of the political spectrum.

### An Adult Spirituality

We value **personal responsibility and freedom** in the process of shaping and living life as a Christian. Adults are invited to **explore and experiment with** the

resources of Christian and Anglican spirituality to discover ways that best nurture them in the Christian life. We understand that what feeds one person may not feed another. We each work out our relationship with God, each other, creation and self in unique ways. The adult Christian shapes a spiritual life that fits his or her own personality and circumstances. Please note -- this isn't about whether children are included (they are) but about what kind of adults we hope children will become.

### A Balanced-Holistic Spirituality

We are moderate, seeking a balanced, reasonable approach to life. It is a life in which prayer, work, study and play have a rhythm, taking into account the whole of experience, ambiguity and all.

### An Organic Spirituality

We understand individual spiritual development to be rooted in communal daily prayer that shapes our relationship to God. Decisions are made in the context of communal prayer so the Holy Spirit fills and enfolds us. We are sacramental - "outward and visible signs of inward and spiritual grace" ; as Christ was the sacrament of God, the church is the sacrament of Christ in the world.

### An Open-Minded Spirituality

- Our way has stressed **an open-minded, searching approach** to faith. Engagement with God and the church is intended to open us to the mystery that is God. So doubt, questioning, exploration and openness to new insights is a path to God and wholeness of life. This involves being open to what may be learned: from studying and praying the Scriptures, from the wisdom gained as the church has struggled with life's issues in the past, from the councils of the church today, from the insights and views of other people, and from the application of our own reason and what we have learned from our experience.
- We see value in **comprehensiveness and ambiguity**. Our way includes holding opposites in tension, appreciating paradoxical thinking, assuming that what appears to be irreconcilable differences may contain a balanced truth, allowing a certain messiness and grayness in our theological and ethical thinking. Living in this way means developing a tolerance of differences in thinking and practice. It also calls for a capacity to listen deeply and respectfully, to have courage in expressing one's own understanding, to wait on God in silence and with patience. Our unity is not the unity of sameness of thought but a unity of trust in God and God's wisdom. This makes for a roomy church with space for many (as long as they will accept allowing space for others).

# The Culture of Worship

At the center of the organizational culture of a congregation is its worship. These notes look at worship in terms of the issues of organizational culture.

## Purposes

To transform lives and so to transform society/culture. Ask -- what kind of "being"/person does this parish's worship nurture? What kind of society do we long for?

## Methods

1. Enfold people into a community in which they participate in its rhythm. Teach people the language, shape, flow, behaviors, and values of the community's worship. Train and coach the congregation for competent participation. For example, this might include:

- Some memorization (food for the heart)
- Ways of understanding shape and flow: take, bless, break, share; death and resurrection; losing life to find life; receiving bread of life to be able to feed others
- Ways of understanding the Eucharist in relationship to the spiritual life:
  - relationship among the three bodies of Christ -- the person, the Church, the sacrament
  - a movement from
    - loneliness ----->solitude
    - hostility ----->hospitality
    - illusion ----->prayer (reality)
  - bringing into unity self, others/society, creation, God.
- Use of silence and stillness
- Use of body: centering, breathing, gestures
- Imaginative engagement at the offertory -- placing our self upon the altar, pouring our life into the cup

2. Invite visitors to just observe at first. Give them space to see and feel before they need to perform.

- a. Train the congregation for a gentle hospitality in worship. An opportunity to notice the new person and what they seem to need and want. For example - offer a hymnal open to the page of the hymn, an invitation to coffee after the liturgy, etc.
- b. Avoid over functioning in trying to help the visitor participate, e.g., announcing everything, explaining everything, introducing each reading or action. Allow space for grace and beauty.

3. Focus on the capacity of the total culture of worship to shape hearts and minds. Avoid getting caught up in focusing on one aspect of the culture and its impact.

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# Congregational Culture: Participation in Worship Areas for Coaching

The following can be used by leaders of worship to encourage participation and “ground” the culture of worship. While the specifics will be different depending on the culture of a particular parish, the consistent factor is the need for leaders to take initiative, through training and coaching, to nurture the competence of people for participation in the worship of that parish community.

**1. Nurturing Communal Competence and Discipline** -- This is an important goal in the development of the community. An empowered community has a capacity for functioning together in a disciplined and competent manner in its worship, meetings, learning, and action.

**2. Centering** -- In worship, in general parish participation and in daily life in workplace, family and friends, and civic life

a. Silence -- An outer silence that may reflect our inner silence or may nurture an inner silence; a gift to self and others; becoming ready to listen

b. Stillness -- Let the body stop; become physically “grounded” (sit up, feet on floor or crossed at the ankles, deep breathing, etc.); learning to think ahead regarding what materials you will need and what you will need to do at various times in worship; not fusing with books or papers, etc.

**3. Listen to Yourself and Others** -- Learning to participate in the unity of the community’s worship by noticing the pace, voice level and style of this particular community. Mutual adjustment is one way in which people become part of the parish community.

**4. Use of the Bell** -- In some settings a bell is used to draw the community into silence and stillness; when rung a second time it is to lead us gently out of the silence. Maintain the silence and stillness until you can no longer hear the bell (plus a bit for some of us!).

**5. The Psalms in the Office** -- Follow the practice of antiphonal recitation (verse by verse alternation between one side of the congregation and the other) and of making a distinct pause at the asterisk. Use these practices because they are specifically recommended in the Book of Common Prayer (p.582-583) and because they require the development of a communal discipline and competence.

## Presiding and Officiating Leading Worship and Congregational Development

These are suggested principles and guidelines for leaders of worship.

They are directed at developing a community's capacity for communal discipline and competence:

- sense of empowerment in worship and all aspects of the community's life
- a capacity for a people to experience worship more as a communal dance; an experience with grace, beauty and "flow"
- the overall task is to equip people so they "know they know," so that the competence for participating is more in them than in the presider or officiant

**1. Equip the Saints** -- A danger in all leadership is that the leader will either over function or under function. What we are seeking is a style of leadership that builds the competence of people for what they are doing together; in worship, leading and participating in a decision making process, or engaging in a ministry of justice and compassion.

Leaders of worship can disempower the community by --

- Withdrawing into a private piety that doesn't attend to the task of shaping and nurturing the community's participation in worship
- Focusing primarily on equipping for the formal roles (e.g. LEM's, musicians, servers, lectors, etc.) so the result is more that of a well done performance than a communal activity
- Providing direction throughout the worship with a stream of instructions to stand or sit, turn to a certain page, etc.

We are trying to move beyond the congregation functioning as an audience watching a performance or an event in which there is a degree of audience participation prompted by the leader.

**2. Center Yourself** -- The leader's "self" shows in the worship experience. The task is to be as present as possible to God, self, the community, and the setting. We do this because it helps center the congregation in its worship and to model it for all of life. It is very difficult for the community to be centered in its worship if the leader is off balance, seriously distracted, or emotionally withdrawn. Hints about centering oneself include:

- Prepare yourself for the experience by being clear about the use of space, flow, what you will do physically, the elements of the worship, etc. Go be in the worship space. Note the kind of things that can disorient you while you are leading.
- Decide on any training or coaching to provide the congregation.

- Check on the key roles others have accepted responsibility for (do only as really needed)
- During the experience -- breathe deeply for a few seconds, sit or stand in a way that is balanced, etc.
- If you are disoriented or ungrounded, talk silently with yourself. Identify what is happening to you and what you need to do to let go of it.
- Finish one thing before beginning the next -- allow yourself to stay with the present activity until it is complete.
- Beware of maintaining a facade of centering yourself by emotionally withdrawing or going into a private piety that cuts you off. The stance you are seeking is that of engaged detachment.

### 3. Prepare the Community for Worship

There is long term preparation and immediate preparation. Some habits, skills, and disciplines will need to be nurtured over a period of weeks or months, e.g., building the capacity for silence and stillness, teaching people how to center themselves, developing confidence about participation (when to stand and sit, how to find things in the books), and about understanding the flow of the Liturgy, etc. Other things need to be done just before this particular act of worship, e.g., practice a new hymn, information about books and page numbers in today's worship.

- a. Make all announcements before worship. The target is to allow the community to flow through the worship event.
- b. Practice behavior that is new to the community or needs reinforcement -- music, silence and stillness, saying the psalms, etc.

Coach and train the community toward competence. Move it into more interdependence and less dependence.

## WORSHIP CATEGORIES in the Episcopal Church

### Your Parish:

These categories are based on those suggested in Episcopal Life, April 1999.  
Review the categories below and fill in the chart.

CATEGORY	<i>Place a check mark next to <b>those strongly expressed in your parish</b></i>	<i>Place a mark next to <b>those you found helpful</b> in sustaining your spiritual life over time</i>	<i>Place a mark next to one that you <b>wish were more expressed in your parish</b> (you may also leave this empty if there are none)</i>
<p><b>Prayer Book Catholic:</b> "full, rich liturgy, good music, beautiful ceremonial, good use of building, nice visual stuff, icons" ... "Strong congregational music, a broad spectrum of the church's orders participating (lay, priest, deacon), and thoughtful preaching... when the liturgy gets too fussy or too casual, its beauty and its ability to transform is largely lost" (Neil Alexander)</p>			
<p><b>Anglo Catholic:</b> Everything as in "Prayer Book Catholic" but with more attention to sensual elements - incense, bells, images; sing the liturgy; attention to the beauty of the liturgy; sense of mystery and rhythm usually strong. "From a Catholic viewpoint, worshipping Christ present in the Sacrament of the Eucharist is an experience so profound that words become inadequate and ceremonial gestures, such as the sign of the cross and genuflections, serve to express some of what we cannot put into speech." (Church of the Advent, Boston, web site)</p>			
<p><b>Broad Church:</b> Desire to be as comprehensive as possible; broad, liberal spirit. Broad church is more difficult to define because each parish will interpret liturgy in different ways.</p>			
<p><b>Evangelical:</b> "...worship has got to be grounded and rooted in broadly evangelical preaching; .. marked also by an appreciation of good music .. We affirm the Western tradition of hymnody and liturgical music because it is time-tested and has been fed by many artist of genius; dignified. This is to say, ordered, objective; predictable or better consistent; and most importantly, vertical and transcendent. It is God centered, not minister-centered (Paul Zahl)</p>			
<p><b>Charismatic:</b> "may be prayers for healing... speaking in tongues .. Freer style of prayer.. Uplifted hands" (Ruth Meyers)</p>			
<p><b>Innovative:</b> Moving beyond the Prayer Book or adding to it. Reordered space, liturgies, elements borrowed from other denominations.</p>			

The following are comments by people interviewed for the article that describe "bad" and "good" liturgy. How are they present in your parish?

<b><i>COMMENT -- description of "bad" or "good" liturgy</i></b>	<b><i>HOW IS IT PRESENT IN YOUR PARISH?</i></b>
Sloppiness	
Inattention	
Anything that makes the congregation into an audience	
Just going through the motions... focused on the mechanics	
Lost of mystery	
Not plumping the depths of what is before us and we rush on to quickly to create something new	
Maintain recognizable pattern - a stability within the variations (in any category)	
Transcendent and Immanent	
Worship that speaks of another age and connects us with the past, and worship that is immensely contemporary	

What is your response to Bruce Jennecker's statement below? Do you share it? How would you change it? Have you experienced it?

"I pray earnestly for the time when we would not name our liturgical styles. Why should Anglo-Catholics have all the pageantry and all the mystery? And why should the evangelicals have the quiet time and the focused response to the word? And why should the social gospel activists have all the good slogans and all the energy for changing the world? My hope is that we will have the potential for worship that is all of those things."



## THE CHURCH: ANALOGIES AND IMAGES

People naturally make the analogy between the Church and other groups with which they are familiar: clubs, corporations, families and so on. References to "organized religion" or "institutionalized religion" reveal the assumption that the Church is just one more form of human organization.

While the process of making analogies with the club, corporation, etc., is inevitable, it creates serious problems for the proclamation of the Gospel. People liken the Church to "various associations which are consciously and voluntarily formed for the pursuit of common interests, ideals or goals. The idea is that a group of individuals band themselves together because they find they have convictions, needs or aims of a similar, if not identical, sort; and they are prepared to cooperate in the cultivation of their shared purposes." People come to the conclusion that the Church is a "society created by human enterprise and designed to serve particular human ends," that it is created by the "agreement of a number of individual persons who presumably define the terms of their association and its goals."

The New Testament word for "Church" - ekklesia in Greek - conveys a different set of assumptions. It refers to a gathering of people who have been "called out," summoned, to be something and do something together. This is the term the ancient Greeks used to describe the calling of a "town meeting." The Greek version of the Old Testament used this term to refer to the "assembly" of Israel, summoned at God's command by a leader like Moses or Joshua. "Church means, not corporation and not club, but a collection of people who have been called out together by a voice or a word or a summons which comes to them from outside." (Last emphasis added).

The Church is not a club-like-minded people who gather to pursue a common interest. It is not essentially a corporation (even though parishes may be legally incorporated) -a structure of human design which organizes labor and resources toward the end of producing a product and making a profit. It is not an agency -a human structure for identifying and meeting material and social needs. It is not a political movement -an association of persons who share a cause. It is not even a family, as attractive as that image may be -a group of people tied together by kinship, or adoption of one another, who sustain these relationships for their own sake. The Church shares elements in common with all of these groups, but if any of these images overshadows the understanding of "called community" in the ordinary language, methods and behavior of the parish, the Gospel is being negated.

All quotations in this subsection are from *Understanding the Faith of the Church*, Seabury Press, NY, 1979, Chapter 10.

Alice B. Mann, *Incorporation of New Members in the Episcopal Church*, Ascension Press, Philadelphia, 1983

Worksheet -- THE CHURCH: ANALOGIES AND IMAGES

IMAGE	MISSION/ PURPOSE	ROLE OF PRIEST	EVANGELIZATION	STEWARDSHIP	WHAT HOLDS IT TOGETHER?
CLUB					
FAMILY					
CORPORATION					
SOCIAL CHANGE MOVEMENT					
SOCIAL WELFARE AGENCY					
MENTAL HEALTH CENTER					
PEOPLE OF GOD					
BODY OF CHRIST					

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## CONGREGATIONAL CULTURE: TENSIONS IN SOME CONGREGATIONS

These tensions have been observed in congregations by participants in the Church Development Institute.

<b>A spirit of abundance &amp; generosity</b>	←-----→	<b>Do with little, save, the less expensive way</b>
<b>Hospitality</b>	←-----→	<b>"Take care of me"</b>
<b>Hospitality</b>	←-----→	<b>Anger, rage toward each other, hostility</b>
<b>Complex, rich culture -smells, sound, silences, sights; beauty</b>	←-----→	<b>Nothing that is offensive</b>
<b>Adult - people make choices</b>	←-----→	<b>People are protected from what makes them anxious</b>
<b>Widely owned</b>	←-----→	<b>Turf</b>
<b>Long term health</b>	←-----→	<b>Short term satisfaction</b>

Note: even the "healthier" cultural characteristics can become harmful if they do not continue to adapt over time. Therefore, it is important that adaptability and flexibility become characteristics of the culture. Otherwise this year's "healthy" culture may become next year's problem.

# THREE MOVEMENTS OF THE SPIRITUAL LIFE

This model is based on the work of Henri Nouwen in *Reaching Out*, Doubleday & Co., 1975

Nouwen writes that "the spiritual life is that constant movement between the poles of loneliness and solitude, hostility and hospitality, illusion and prayer. The more we come to the painful confession of our loneliness, hostility and illusions, the more we are able to see solitude, hospitality and prayer as part of the vision of our life."

## REFLECTION ON THE PARISH

This is an opportunity to contemplate your congregation by using the framework of "the three movements". Circle phrases or add your own comments in the various categories. Your objective is to see clearly. Try to avoid getting into how to change things.

### LONELINESS

- Greedy, needy, clinging, exploitative, dependent, sentimental
- A place of rivals and competition
- Seem to be driven by a need for words and events that bring immediate satisfaction
- Seem to assume that togetherness is "the solution"
- See parish as a place to take away our loneliness
- Not OK to be "closed" for now, have difficulty honoring and projecting our own inner life



### SOLITUDE

- Mutual respect, consideration, for individuality, allows aloneness
- Capacity to be still and silent
  - together
- Capacity to listen uncomfortable words
- Value those who listen to their inner voice

### HOSTILITY

- Impatient, frustrated, busy fearful, aggressive, passive
- Parish life if crowded with things to do, events, expectations, pressure
- Running from pain and death
- Sees new people as a danger to the way are; or to be used for parish needs



### HOSPITALITY

- Receptive, safe boundaries, question and experiment without fear; Invites openness while honoring uniqueness
- Touches pain and death with compassion
- Sees the parish as a space in which people might be changed
- Children are valued
- There is a "defined" culture, a sense of who we are as a community of faith; there are limits and boundaries with flexibility
- Receptivity and challenge

## ILLUSION

- Discussion and prayer seems trivial, full of platitudes
- Illusion of immortality; sentimentality, violence, overly serious
- Making idols of our dreams
- Seeking quick healing; sense of desperation for fulfillment
- Illusion of control of self and others; church (parish) the result of human efforts
- Prayer is an "add on" to our togetherness



## PRAYER

- Longing for "reality"
- Acceptance of our own and life's complexities; humor, life as fragile gift
- Community provides training and support for prayer and spiritual life
- Patient, a waiting community, acceptance of God's presence and absence
- Parish's depth is by God'
  - Initiative
- Prayer is at heart of parish life

## Organizational Moral Development<sup>1</sup>

Organizational Moral Development
<b>STAGE 1. Social Darwinism</b> Fear of extinction and the urgency of financial survival dictate moral conduct. The direct use of force is the acceptable norm.
<b>STAGE 2. Machiavellianism.</b> Organizational gain guides actions. Successfully attaining goals justifies the use of any effective means, including individual manipulation.
<b>STAGE 3. Cultural Conformity.</b> A tradition of standard operating procedures and caring groups. Peer professional pressure to adhere to social norms dictates what is right or wrong behavior.
<b>STAGE 4. Allegiance to Authority.</b> Directions from legal authority determine moral standards. Right and wrong are based on the decisions of those with legitimate hierarchical power.
<b>STAGE 5. Democratic Participation.</b> Participation in decision making and reliance on majority rule are organizational moral standards. Participative management is institutionalized.
<b>STAGE 6. Organizational Integrity.</b> Justice and individual rights are moral ideals. Balanced judgment among competing interests shapes organizational character which, in turn, determines right and wrong behavior.

From "Organizational Ethics Development and the Human Resource Professional" by Joseph A. Petrick, Summer, 1992, in *The Human Resources Journal*.

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# LEADERSHIP STYLES

<b>Leader Centered Authority</b>		<b>Group Centered Authority</b>
	Tells   Sells   Tests   Consults   Enables   Joins	

- Tells**                      Leader makes decision and announces it.
- Sells**                      Leader has made decision but wants to have others buy it.
- Test**                      Leader has made tentative decision, wants to test it with others to get response.
- Consults**                Leader wants group's ideas on problem. After receiving ideas, leader makes decision.
- Enables**                Leader enables group to make the decision. This may include the leader setting limits regarding what the group may consider and/or establishing procedures and processes for the group's work
- Joins**                    Leader acts as participant in the group. Group makes the decision.

There is not any one correct style. Factors that influence that choice of leadership styles include:

- What style is needed in this particular situation, with this group at this time given the task to be done.
- What style is the leader comfortable with?
- What style is the group comfortable with?
- What laws or group standards effect the decision?

It is very important that both the leader and the group know what style is being used. Lack of a clear agreement regarding the leadership style being used can lead to serious conflict in the system.

Most leaders tend to operate within a certain range of styles. It's helpful to be clear about your normal range.

In most systems it is the leader's decision as to what style he or she will operate from. Group members may need help in understanding that operating out of an "enables" or "joins" style in one situation does not commit the leader to that style in the future.

[Based on the work of Bob Tannenbaum and Warren Schmidt in their Harvard Business Review article, "How to Choose a Leadership Pattern." May – June 1973

# Self- Differentiated Leadership

Leadership that adequately attends to three tasks:

**1. Staying connected to the system** – staying in touch with the people and culture of the organization; taking in information

As a Participant -- Sharing yourself – feelings and ideas. Use of communication/listening skills (paraphrasing, active listening, referencing another’s ideas, saying what you like about an idea as well as what concerns you), non verbal attention (eye contact, posture, showing active interest, etc.)

As a Team Leader -- Action to invite participation in listening to each other, gathering information about the task or the group, mutual assessment/diagnosis; sensing the climate of the group and enabling the team to do the same, etc.

As an Organizational Leader -- - Establishing structures/process/climate that: a. Enables communication and shared assessments of organizational life including channeling, testing, use of OD consultants, regular management retreats, etc and b. Enables the organization to listen to the trends and forces in its external context

**2. Setting Direction** – taking non-reactive, reflective, data based, well thought out positions about direction

As a Participant -- Own sense of being “grounded”, “centered”; taking clearly defined positions that are not reactive; sharing your own wishes regarding the task and team relationship maintenance in appropriate ways, etc.

As a Team Leader -- Action to help the team define the task, get organized and act on it; responding to the team’s climate, etc

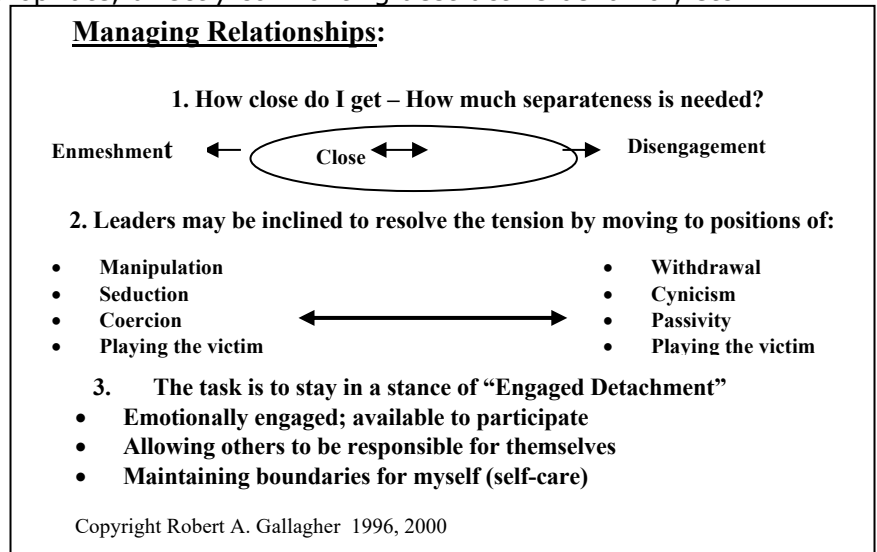
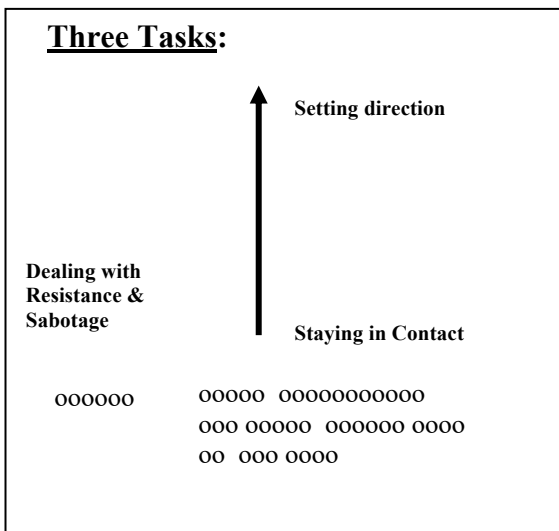
As an Organizational Leader -- Action planning; leader being open about her/his vision regarding direction and organizational culture; moving issues to a decision, alignment of values/intention/action

**3. Dealing with Resistance and Sabotage** – the essential issue is not getting distracted from the direction by the resistance while also not “cutting off” from those resisting

As a Participant -- Managing your own tendency to be a cynic, go “passive”, etc.; managing your own anxiety about pleasing or taking care of others; not colluding with attempts to pull the team away from its task; dealing with your own desire to withdraw, quit, fantasize about “going back to how it use to be”

As a Team Leader -- Acknowledging the other’s position; stating your own position and your desire to move forward, even with your own doubts; invite others to join you in moving ahead; as appropriate “test” options with the team; etc.

As an Organizational Leader -- Establishing norms of “no threats”, dealing directly with concerns, “no surprises”; as appropriate, directly confronting destructive behavior, etc.





## BECOMING IDENTITY & MISSION FOCUSED

As parishes move toward becoming healthier, more faithful and productive systems there is a shift from an over-dependence on leaders to a focus on the common mission and identity. That identity and mission are grounded in the nature and mission of the whole church.

### LEADER DEPENDENT

The parish appears to wait on the leader's initiative in getting decisions made; if the leader is away or ill everything seems to be "on hold; there is a sense that dependence is encouraged as part of the culture

The parish's sense of identity and direction is so bound up with the leader (especially true in cases of founders and strong family)

Is a closed system (little in the way of challenging feedback from within the parish, little attention to shifts in the external context)

Conflict is seen as a threat to the leader's position and the parish's well being; maintaining a facade of peace is important

Leader is expected to motivate, reward, encourage people

Roles are limited in scope; people have a narrow view of their role in the parish

The system seems to have a culture that is either consensus driven or dependent on charismatic leadership; in either case the leader is at the center of what maintains the parish's peace and sense of direction

There is a high concern about harmony and being aligned with the leader

People speak on behalf of others; express things in terms of "we" think, feel, etc.

### IDENTITY & MISSION FOCUSED

Initiative comes from various places in the system

There is a clear sense of who we are and what direction we are moving in. Whatever the language used – the mission, vision and core values are widely "owned" in the parish

Is an open system, a "listening system"

Conflict is managed; seen as normal

Leaders expected to organize people around the mission

There is adaptability in functioning; people see their role in the parish in broad terms (i.e., not "just doing my job" but also competence and commitment for team work, helping to shape the parish's direction)

Leaders work at staying in touch with the system, are clear about their own priorities and values, establish parish's direction

There is a focus on developing and maintaining a healthy culture and identity; attention is also focused on the mission and vision, which guides and unifies people in the parish

People speak for themselves, "own" their statements; are open to dialogue in which they listen and offer

# Negotiating Vision

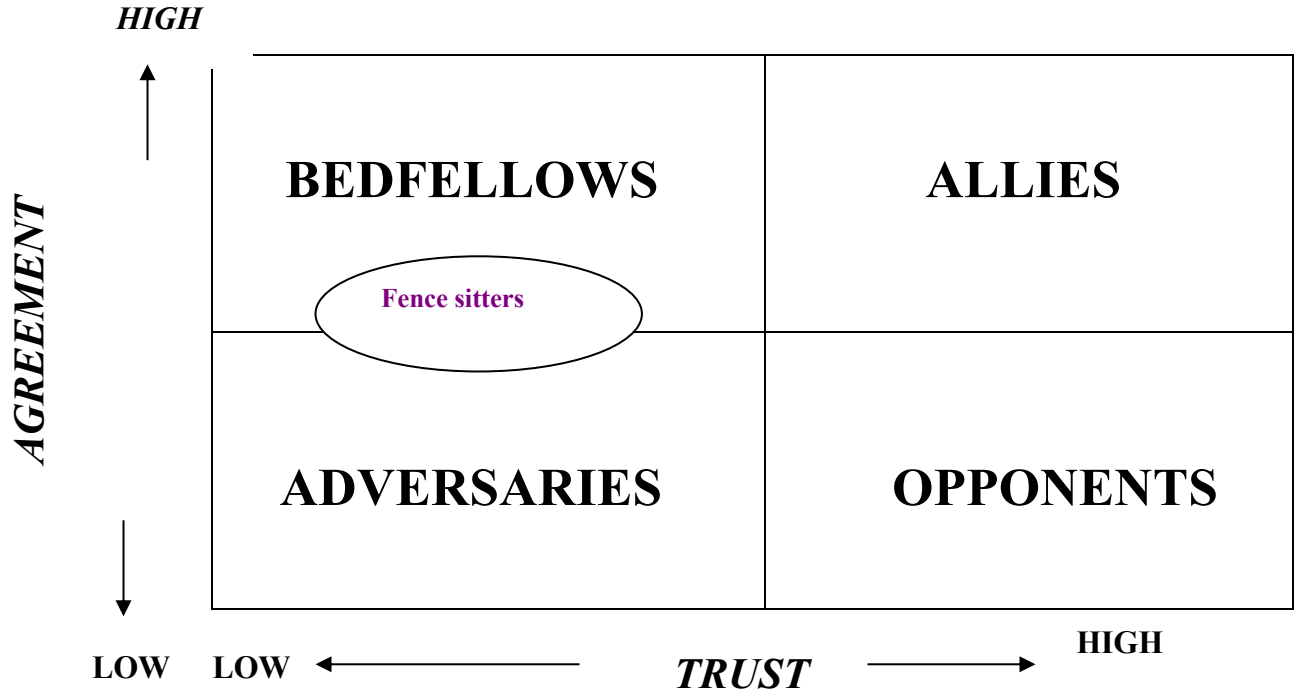
Suggestion – buy the *Empowered Manager* by Peter Block

You are negotiating agreement and trust.

STEPS:

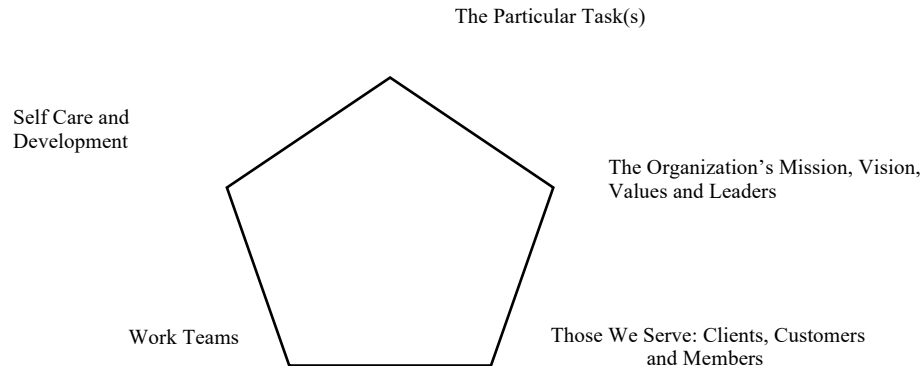
1. Who do we need for the success of the vision, of this project?
2. Go through the steps of negotiating
  - ◆ Exchange vision (purpose, goals, etc.)
  - ◆ Affirm or negotiate agreement
  - ◆ Affirm or negotiate trust

**TRUST – built by  
openness, acceptance,  
reliability and congruence**



## Aspects of Shared Responsibility in Organizations

One way of describing the fullness of our participation in an organization is as five interrelated areas, each of which requires competence and commitment.



### 1. The Particular Task(s)

This involves the specific functions of positions we have agreed to fulfill, e.g., building management or maintenance, social worker, CEO, board member, office support, financial development, church musician, teacher, etc. Competence means using skills and knowledge that are directly related to performing the task.

Commitment includes a work ethic that is interested in accomplishing the task, taking initiative, follow through, etc. Some people seem to view this one aspect of their involvement as being the whole thing. The success of the organization depends on people seeing their specific role in broad, inclusive terms.

### 2. The Organization's Mission, Vision, Values and Leaders

This includes knowing and supporting the mission, vision, values and leaders of the organization. Another way of expressing it is that we are adequately comfortable with and willing to play a positive role in the organization's culture (e.g. the way things are done, how we live and work together in this organization). Destructive or cynical comments about the organization and its leaders are avoided. There is active participation in organizational gatherings that build a sense of purpose and community or processes that contribute to the organization's improvement.

Related competencies might include communication, presentation and negotiation skills; large group participation, skills for planning and envisioning, etc.

### 3. Those We Serve: Clients, Customers and Members

The core commitment in this area is to the satisfaction of the people we are serving. A target is to exceed their expectations in the quality of our service or product. We need a clear understanding of who we are serving, both those external and internal to the organization. Service is to be thorough, timely and respectful. We need a way of receiving ideas and feedback. Delivering quality services or products also requires us to take initiative to secure the quality we need from those that serve us by supplying our organization with services or products. It is in our interest to help them to improve their service to us. Competence includes methods for planning and delivering quality services or products, such as work flow, process assessments, problem solving processes, time management tools, communication skills, information gathering processes and tools, etc.

### 4. Work Teams

In our participation in organizational life most of us work in a variety of permanent and short-term teams. Team effectiveness depends on our commitment to the people who make up the team and to the team's success. The competence areas involved include: group assessment and decision making processes, communication skills, an understanding of trust development in teams, how to establish team norms, facilitation skills, managing disagreements and conflict, etc.

### 5. Self Care and Development

This is a commitment to emotional, physical, intellectual and spiritual self-care and development. This may include making adequate time for solitude and relationship building; receiving training to increase our work related skills or learning "centering" methods. For many of us this area has to do with our striving to live lives of integrity, balance and integration.

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## SHARED LEADERSHIP:

### The Maintaining of Task and Relationship Functions

#### Shared Leadership

A group functions more effectively when all its members accept responsibility for the work and life of the group. This shared sense of responsibility is also known as shared leadership. Much of the work done in recent years on establishing self-managing teams in the workplace is based on the assumption that employees and members are able and willing to accept more responsibility.

This doesn't in any way diminish the need for skilled, effective team leaders. People who have a designated role in decision-making and/or facilitation of team decision-making. While most work teams will continue to make use of designated leaders, team effectiveness can be significantly enhanced by shared leadership, the resources of all can be engaged. In this understanding it becomes part of the designed leader's role to equip others for shared leadership.

There is no reason why it must fall to the designated leader to be the proposer of goals, the clarifier of the task, the timekeeper, and the emotional encourager of the group. Any one who sees the need for these functions at a particular time may perform those functions.

One way of looking at shared leadership is in terms of the various functions that people play in an effective group and the tension among three aspects of the group's life.

#### Three Aspects of a Group's Life

All working groups are dealing with three elements that may work together in harmony or may come into tension:

- **Task** – the group needs to accomplish some task, it needs to engage in behaviors that help it accomplish that task
- **Relationships** – the group is a network of relationships; attending to relationship needs allows for both a more effective and more satisfying experience.
- **Individual Needs and Wants** – each member of the group brings with them their own needs for acceptance, influence, and intimacy.

All groups have these three elements. They each require attention if the group is to be productive in its work and satisfying to its members. There is a tension among them. 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.

## Task Functions

Behaviors that help a group to accomplish its task. This might include checking out the team's acceptance of the task and objectives, helping to organize the work, or testing the group's readiness to move to a next step. Here is one way of looking at the functions.

**Initiating** -- Making suggestions, proposing group action, suggesting a decision making process, or a way to accomplish the work E.g. – "I'd like to get started, is that acceptable?"

**Information seeking** --Asking for facts, or clarification that is related to the group's task. E.g. - "What is the funding for the new project? Will it be adequate?"

**Information giving** -- Offering valid and useful information that is relevant to group decisions. E.g. -  
"Receipts have increased an average of 10% over the last three years. "

**Opinion seeking** -- Inviting others to share their beliefs or preferences and assessment of matters before the group. "Do you think we need to try a new approach to new member orientation this year?"

**Opinion giving** -- Expressing personal opinions or assessments of alternatives. E.g. - "I don't think the members are interested in half of the programs we are offering."

**Clarifying** -- Interpreting or explaining facts or opinions; identifying issues before the group, defining terms, paraphrasing other's statements, illustrating ideas or suggestions. E.g. - "You're saying we need to find a new way to discover what programs might best serve our members."

**Elaborating** – Expanding on ideas and suggestions that have been made. E.g. – "I'd like to see us have focus groups each year to explore member's interests."

**Setting standards** – Helping the group establish norms and standards related to getting the task accomplished. E.g. – "Can we agree to always assess proposals by asking for what we like about them, as well as what concerns us?"

**Summarizing** -- Pulling together related ideas, restating suggestions after the group has discussed them, reviewing major points in the discussion. E.g. - "So far we have come up with three different ways we could approach this. "

**Consensus-testing** – Asking if the group is ready to make a decision; offering a process by which the group might test agreement or investment in a proposal. E.g. – "Could we go around the group in a circle, having each of us share what we are ready to agree to."

## Relationship Functions

There are a number of member functions that build and maintain the relationships of the group. Initiative can be taken to facilitate inclusion and acceptance, provide encouragement and support, and manage conflict.

**Encouraging** -- Being open and responsive to others; recognizing and supporting contributions; inviting comments. E.g. -- "I think that's a very useful idea. I can see how it will help us move beyond the disagreement."

**Expressing group feelings** -- Testing hunches about the mood of the group; doing so in an open, exploratory fashion; offering your own feelings as related to the group climate or need. E.g. - "I'm not feeling much energy for this project. Where are the rest of you?"

**Harmonizing** – Negotiating or reliving tension when appropriate; suggesting ways of accommodating differing views; helping others explore their disagreements; seeking appropriate compromise solutions that "slit the difference" or make some type of trade-off. E.g. - "Both sides have a strong investment in their approaches. Let's see if we can work this out in a view that uses the best of each and respects all parties."

**Gate-keeping** -- Facilitating the participation of others, inviting less active members to contribute. "Several of us have expressed our opinions on this. I'm interested in what you think about it, Charlie?"

**Setting standards** – Helping the group establish norms and standards related to maintaining relationships. E.g. - "I think it would be helpful if we spent a view minutes at the end of each meeting commenting on our work together."

## Individual Needs & Wants

The members of any group come with their own mix of needs and wants around being included, having influence, being close to others, etc. These needs and wants are essential to groups' healthy functioning. They provide some of the motivation, energy and glue for group life.

Most of the time people meet their own needs while also contributing to the groups work and the maintaining of relationships. At other time group members may engage in "self-oriented behavior" that is at the expense of the group and others. It may show up in behavior such as arriving late or leaving early from team meetings, ignoring team norms, having side conversations or withholding information that the team could use.

The group and designated leaders can help people use there needs and wants in a productive way by:

- Engaging in shared leadership; taking common responsibility for the task and relationships of the group
- Inviting members to share needs and wants.
- As possible working to address the needs and wants expressed by members
- Using tools such as MBTI and FIRO-B to explore and respect differences

Examples of self-oriented behavior that is likely to interfere with the group's functioning:

- **Controlling or aggressive behavior** - Intimidating other group members, stating a position in a way that brooks no opposition.
- **Condescending** – Putting down the contributions of others
- **Blocking** - Arguing too much on a point; rejecting ideas without considering them; resisting stubbornly, reiterating a point after it has been discussed and rejected, changing the subject or continuing to raise objections when the group attempts to settle on a decision.
- **Dominating** - Asserting authority, status or superiority, excessive talking, interrupting or overriding others' comments.
- **Avoiding** - Ignoring relevant information, ideas and feelings.
- **Recognition seeking** - Horseplay, recounting unrelated personal experiences, pontificating.
- **Withdrawal** - Refusing to participate in group discussions, giving off non-verbal signals of disapproval or opposition; missing meetings; arriving late, leaving early
- **Pairing up** – Creating a caucus within the group of people who protect and support one another while ignoring the relationship functions
- **Dependency – Counterdependency** – A pattern of leaning on or resisting anyone in the group whom represents authority or expertise.

Robert A. Gallagher, 2001 This document is a revised version of earlier writings on group functions that has appeared in training manuals of MATC, LTI, NTL and other groups for many years



## SELF MANAGING TEAMS: Managing the Tasks and Relationships of the Teams

One aspect of being a self-managing team is taking responsibility for and providing leadership in the team's tasks and relationships. The more the team is managing how it gets at the work and how it enables relationships so that they help in the work, the more the team can be said to be self managing. The team operates within the broader vision, goals and time lines of the organization. Within that context organizational leaders and the team plan how to make the team more self-managing.

FUNCTION	WHEN DID YOU SEE THIS IN THE TEAM?
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### **FUNCTIONS THAT HELP A TEAM FULFILL ITS TASK**

Goal Setting - helping the team to establish a sense of direction; to set goals or objectives; to get a vision.

Organize the Work - enabling the team to get organized so it can do its work.

Time Management - facilitating the team in setting time lines; in paying attention to time lines.

Self Direction in Working - the team and individuals taking responsibility to get the information they need to do the work; taking initiative in the work.

### **FUNCTIONS THAT HELP A TEAM HAVE GOOD RELATIONSHIPS IN DOING ITS WORK**

Providing Support and Encouragement - helping each other offer and use their knowledge and skills.

Facilitating Communication - using good communication skills; "gatekeeping" by helping keep communication open, keep people involved, etc.

Improving Team Relationships - helping people understand each other; appropriate use of humor; etc.

Managing Conflict - helping explore differences; using problem solving, negotiating and outside help as needed; knowing when to involve others to help resolve the conflict.

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## PASTORAL LEADERSHIP TODAY

*A public lecture given by Br Martin L. Smith SSJE at the General Seminary, New York, on April 14 1997, during a session of the College for Bishops*

I would like to begin this lecture with a preamble which signals that we are aware of beginning to accustom ourselves to the post-modern climate. That sounds a little pompous, but these points can be put simply. I can quote Neils Bohr, the celebrated physicist, "Every sentence that I utter should be taken by you not as statement but as a question." Truth seems to have made its escape from dogmatic assertions demanding submission. Truth has reappeared somewhere else as an event occurring in conversation within communion, when we engage and respond to a speaker whose words constantly imply the questions, "Is this so? What is your experience?"

Then I could pass on the dictum, "In the post-modern world every sentence should end with the phrase et cetera..." We are learning to face the radical incompleteness and partialness of any and every statement. Every statement cries out for amplification and correction from other standpoints than the one the speaker is occupying at that moment. So let us listen for the unexpressed "et ceteras," as well as the unexpressed question marks. And thirdly, as we cross the post-modern divide, we are learning to be a little more realistic about claims to objectivity. All standpoints are more personal and prejudiced than we were taught to think was proper. We have to recover from the embarrassment of that discovery and realize that, once we are aware of them, we can afford to be more friendly towards our prejudices. The literary critic Anatole Broyard used to tell his writing students, "Hang on to your prejudices they are the only taste you have got...Paranoids are the only ones who notice anything anymore." In thinking as in life, if you do not fix a starting point, you'll never get started. Kenneth Grahame, the author of *Wind in the Willows*, once showed his awareness of how much of ourselves we are displaying in any kind of lecture or essay in these charming words. "You must please remember that a theme...is little more than a sort of clothesline on which one pegs a string of ideas, quotations, allusions and so on, one's mental undergarments of all shapes and sizes, some possibly new but most rather old and patched and they dance and sway in the breeze and flap and flutter, or hang limp and lifeless and some are ordinary enough, and some are of a private and intimate shape and rather give the owner away and show up his or her peculiarities. And owing to the invisible clothes line they seem to have some connection and continuity."

Our theme this evening is Pastoral Leadership. A good deal of what I will say focuses on episcopal ministry, but I hope it is not difficult with a little recalibration of scale to apply many of the insights to pastoral ministry at the level of the parish. And in stringing out my proposals -questions -I throw up items of an intimate shape that give the owner away. My particular line, or bias, is to pursue the topic from the standpoint of what could be called roughly, interiority, or spirituality. Its what I'm used to, and it could be useful, so long as everyone recognizes that it is one lens among many for surveying a topic with many aspects.

Viewing the topic of pastoral leadership through the lens of spirituality is not the same as investigating the 'devotional life' (post-modern discourse is full of 'air-quotes') appropriate to men and women in leadership, although the equation spirituality =

devotional life is regrettably entrenched in most parts of the church. Spirituality is a complex of practices and values concerned with the divine urge for our freedom. Spirituality is about setting about being set free. How do we set about living freely in the Spirit? Spirituality is not a realm of concepts and ideals but is embedded in praxis, actual ways of practicing freedom. We need lots of practice to be set free. And the consensus of all the wisdom traditions of spirituality, eastern and western, is that freedom is intimately related to awareness, to what we allow ourselves to admit into consciousness, of what we are prepared to know and face, what we don't want to know, what we repress, what we banish, or what we hand over to others to know so that we won't have to. In our Gospel of John, Jesus tells us that it is the truth that will set us free. The *Pneuma*, the Breath of God, our Advocate, the One on our side, is the Spirit of Truth.

To approach the issue of pastoral leadership in the church from the standpoint of spirituality then, is to raise the question, "How do those who are called to this ministry break through to the truth of their identity and find spiritual freedom in and through the exercise of their vocation?" And the answers are bound to be related to the question of awareness. "In order to be on the way to being free as a woman or man who is a pastor/leader what do I need continually to learn to be aware on How do I practice the full consciousness that enables me to live this identity authentically?"

That this is a traditional understanding of spirituality can, I think, be verified. A good example would be the book "On Consideration" written by St Bernard of Clairvaux for a former monk and pupil of his who was elected pope at a turbulent time when the population of Rome were in the middle of one of their frequent revolutions. The book was intended to help him hold steady and make sense of his role in the midst of very complex pressures. The fascinating thing about the book is its comprehensive range. His counsel deals with a whole spectrum of issues, about his political and social responsibilities, about comprehensive reforms as well as theology and prayer. It is fraught with a vivid sense of the inevitable and unresolvable conflicts, tensions and polarities of the life of leadership. He wants Eugene to "consider" the whole scope, the big picture. Consideration is active, searching awareness that integrates insights gained from every area of the field of experience. "As opposed to contemplation which deals with truths already known, consideration seeks truth in contingent human affairs where it is difficult to perceive." (Elizabeth Kennan) "It imparts knowledge of divine and human affairs. It puts an end to confusion, closes gaps, gathers up what has been scattered, roots out secrets, hunts down truth, scrutinizes what seems to be true and explores lies and deceit. It decides what is to be done and reviews what has been done." (VII 9)

It is intriguing to discover that Bernard's insights into the pressures experienced by pastoral leaders and the counsel he gives, have in many instances a startlingly contemporary relevance. For example, the book begins with the subject of the dangers of being overburdened as a result of the tendency of the pastoral role being what we call today 'overdetermined,' saturated with an excess of superimposed responsibilities. He warns that stress will lead to the dangerous condition of "numbness"; pruning his schedule is necessary. He goes on to warn of the distortion of the pastoral office by the invasion of litigation. This constant arbitration in legal disputes is wrecking the ministry of oversight and has to be resisted. He deals with the question about what to do about a corrupt and incompetent staff that he has inherited by insisting that the only remedy is to replace them with trained and trustworthy people. Bernard even anticipates our

very contemporary pastoral theme of the importance of ministering to oneself It is encouraging to find that this isn't a piece of modern psychobabble but a traditional ascetical counsel. So he emphasizes the necessity of Eugene carving out some leisure in order to practice consideration, and he puts it in terms of including himself as part of the flock he is called to pastor. "I praise your devotion to humankind, but only if it is complete. Now, how can it be complete when you have excluded yourself? You too are a man. For your devotion to be whole and complete, let yourself be gathered into the bosom which receives everyone... You also drink with the other from the water of your own well Therefore remember this and not always, or even often, but at least sometimes give your attention to yourself Among the many others, or at least after them, you also have recourse to yourself" (Bk 1 4:5)

The wide-ranging and comprehensive scope of this pastoral treatise helped me realize that pastoral leadership, especially in its form in the episcopal office, requires a spirituality of wide-ranging and integrated awareness. To be a bishop is to require spiritual tools which relate to the vocation of sustaining an over-arching, inclusive and comprehensive vision. Let us take this a little further.

The standpoint of interiority encourages us to take our images and metaphors seriously, to internalize and amplify them so that they resonate deeply. The episcopal office has at its heart a simple image. The *episkopos* has oversight. We need to feel the image in our bodies and not just rationalize it. The image is one of the body elevated or raised up so that the eyes can take in the full view of a situation, impossible if one remains at ground level. An overseer literally can see over a situation of collective endeavor from a vantage-point that enables him or her to take in the whole scene. Those of us brought up to be familiar with old-fashioned factories can envisage those elevated booths which enabled an overseer to view a range or system of machines so that he or she could continually monitor the system. At the beach the lifeguards have elevated seats in order to have the panorama necessary for their task. The episcopal office is a charism of panorama, or integral view. The office is a vantage point for gaining a vision of the whole situation of a substantial Christian community, a situation that is unlikely to be so clear to specialists focussing on a particular dimension of mission, or to those who are wedded to the claims of a particular locale. The spirituality of episcopacy is especially a spirituality of panorama, or taking in the big picture. The bishop is entitled to ask all the questions that can be asked. She or he has the guardianship of all the questions. So the spirituality of a bishop should be a spirituality committed to the pursuit of a wide-range of consciousness and awareness.

The other image for pastoral leadership is, stating the obvious of course, the shepherd. We consciously carry over from an archaic herding culture an image of the pastor, the herder of sheep, supervising their breeding, birthing, nurture, shelter, their movements to and from pasture. There are many resonances and implications in this *symbol* and one of the most significant ones is the maintenance of the integrity or completeness of the flock. The force of the archaic image depends on our awareness of the artificiality and precariousness of a flock of sheep; it is in real and constant danger of unraveling, dissipating and scattering, from the intrusion of predators and the lack of any natural force to keep the group together. Sheep wander. A flock is an unnatural and unstable entity. It requires constant arduous and unflagging work to sustain the flockness of the flock, sometimes dramatic intervention, always the work of patrol and the defining of the boundaries and orientating the collective movement. The image only works if we

see that spiritual community also is something made. It has no instinctual existence. A church is something God continually creates, and we co-create and co-recreate it with God as fellow workers. And the church's pastors are ministers with special responsibility for the promotion of the fullness, wholeness and integrity of the community. So from the beginning the bishop's ministry has been both an agent of and a prime symbol for the church's unity, its integrity and cohesion. And he or she is the agent of and prime symbol for the church's constant striving to realize catholicity, inclusiveness, all-embracingness.

All this states the obvious. Pastoral leadership is active co-responsibility with Christ for inciting, sustaining and guarding the church's life as community. Episcopal pastoral leadership is the particular responsibility for sustaining community at the inclusive level of a diocese, which is a collective large enough to represent, to a greater or lesser degree, the church's catholicity or inclusiveness and wholeness.

Pastoral and episcopal spirituality must then consist in those practices of "consideration" (to use Bernard's term) or integrating consciousness that keeps the pastor/bishop capable of viewing and seeing the big picture on behalf of the community, taking in the full range of evidence and growing in the capacity to integrate more within his or her field of awareness. And we can say right away that it must involve a considerable readiness for conflict because many of those who are committed to a particular part of the scene or a particular aspect of it are not likely to see the view or gestalt of the whole which the bishops must cultivate precisely because they are called to sustain the overview.

I am almost tempted to say much of the loneliness of being a pastoral leader and a bishop is that this vocation to the "overview" is precisely what most people cannot be expected to grasp. Only a few get to see the whole from a vantagepoint of awareness that can integrate evidence from all parts. The frustration of a bishop is the continual struggle against partial and limited views, standpoints that prevent the holders from taking in a full range of evidence. It is a frustration as old as the new testament, as we see from the exasperation of Paul in the letters to Corinth. Paul as apostle is appalled when leadership is being seized by or given to people who are committed to narrow slices of reality and lack the ability to take in connectedness and wholeness. "I hear there are divisions among you." We can see today the contradictions and confusions that arise in the cases where partisans and ideologues are elevated to the episcopate. A terrific dissonance occurs because of the contradiction between this mentality that depends on splitting off and the spiritual demands of the office itself.

Bishops tell me that they realize that not a great deal in parish or academic life actually serves as much of a preparation for the office of bishop and this makes sense too. Only the actual experience of having the overview gives you the overview. A bishop therefore has to develop a sense of identity with the help of fellow-bishops and other insightful people in the face of very widespread and inevitable misapprehensions and distorted views of what a bishop is. In fact this is one of the prime tasks of episcopal spirituality. To keep on doing the work of discernment in the midst of a force field of projections, stereotypes, precedents, traditions and popular assumptions about leadership and pastoring, many of which are highly distorted and distorting. The work of spiritual awareness is to grow in the capacity to identify these often almost invisible forces in the environment of society, in the church and in ones' own psyche. Journalists and politicians have their ideas what a bishop should be, different constituencies within

the clergy and laity have their ideas, the episcopal predecessors had theirs and left them around as spectral forces with an afterlife of several generations, and so on.

Classic spirituality had at its heart the discipline of discernment through what was called the "manifestations of thoughts." The ancient form of spiritual direction was not asking advice about prayer but articulating one's experiences to a wise person, especially spelling out concerns that had a particular obsessive character in which one seemed to be being pulled in one direction or another by a kind of undercurrent. The idea was to bring to consciousness if possible the source of this undercurrent working against freedom. The practice is still indispensable and we will need both private and group settings in which to do it. And one can easily imagine how it might help by identifying in the environment and in the psyche forces that are exerting a distorting influence on the experience of being a pastoral leader.

From my conversations with bishops I can easily come up with examples. Let us think of the misconceptions that exert a distorting influence on the business of being a pastor. One very common one is the notion that the business of pastoring is personal one-on-one (telling expression!) care of an individual who has a problem, is undergoing some kind of personal transition, or is in 'spiritual need.' When one is doing that one is exercising one's role as a pastor. A slightly more sophisticated version extends one-on-one to include a family in need or in transition. In that case being a pastor is one of the hats a bishop, for example, wears. He is also an administrator, liturgical president, teacher etc, etc. All these are common misconceived as separate roles into which with more or less versatility he steps one after another. The bishop is 'being a pastor' when he leaves his desk, quits his meetings, to rush to the bedside of the sick wife of one of the priests of the diocese to be with the couple in their hour of need. " At last" the bishop may say, harking back to his or her days as a parish priest, "I have the chance to be a pastor again. " Or the onlooker says to herself, "I now realize that Bishop X can be a pastor when he chooses to be ..."

Well, there is probably no need to develop the scenario in more detail. No doubt the training given to new bishops keeps on underscoring the crucial transition from a ministry that is devoted a lot of energy to the personal care of individuals, couples and families to a ministry that engages with a large system or institution, the diocese as a whole. But I suspect it takes a tremendous amount of awareness before one has seen right through the distortion. The distortion is treating 'pastoring' as a discrete activity. The key thing about the identity of pastor is that pastor makes a better adjective than a noun. It is not that the role of bishop tends not to leave much time for being a pastor, except for occasional troubleshooting, or 'nurturing' (blessed buzzword) her or his staff. Rather being a pastor is what a bishop is being in everything a bishop does, insofar as that contributes to her or his sustaining the overview and promoting the health and integrity of the larger whole. In fact a pastoral leader might be more faithfully pastoral in the hours spent toiling in administration that makes for progress, working with consultants, laboriously renewing vocational discernment processes with representatives from all over the diocese, than in personal ministries that seem pastoral in the popular view.

Another variant is to identify the role of pastor with the special responsibility that a bishop has for the ordained clergy. Of course, (so this version goes) the bishop cannot possibly be everybody's pastor but he or she must be the personal pastor of all the

clergy. That there is some truth in this notion is obvious but the dangers perhaps are more hidden. Just now we are in a transitional phase halfway between an outmoded clericalism and a not-yet realized understanding of ministry as the responsibility of all the baptized. I suspect the present notion of the bishop as pastor of the clergy will have to be looked at again and again as part of examination of the tenacity of clericalism. I took part on a Tuesday in Holy Week in the renewal of priestly vows in a diocese. All the clergy were present with the bishops. But what does it mean for bishops and clergy to renew their vows as pastors, with the laity of the church utterly absent from the solemn gathering except for the cathedral verger, the organist and one or two volunteers helping with the luncheon? What does this say theologically about our conception of pastoring? I was taken aback to be told by a liturgical expert that this liturgical ceremony was invented by the Vatican authorities in the upheavals of the early seventies when the loyalty of the parochial clergy seemed more and more at risk and it seemed good to create an occasion when they could all be seen renewing their solidarity with the hierarchy. Did we do well as Anglicans to adopt this Roman ceremony in this form?

Beneath misconceptions of pastoring there is a strong undercurrent of prejudice fueled by the value allotted to psychotherapy in our culture. Real pastoring is seen as a transaction between persons in private. By contrast activities that concern the community are often downplayed or disparaged as "bureaucracy" or "social activism" or "maintaining the institution. "

Another distorting undercurrent present in the force field of the contemporary pastoral environment is the association of pastoring with affirmation. Listening carefully to conversations we soon begin to pick up the link many people have made between pastoring and saying yes, pastoring and making someone in a situation feel affirmed and good about themselves etc Here pastoring has become a kind of style, specifically a style that precludes refusal. There is a chorus of pain in the church about how 'unpastoral' its processes are, such as the ordination process. No doubt there is a tremendous amount of ineptness and confusion in many of these processes and they call for constant reform. However the link with affirmation is a cultural contamination. "Let your yes be yes and your no be no" said Jesus, and there is nothing to suggest that we do not have to say no as often as we have to say yes. Experienced bishops who have run the gauntlet of this prejudice remind us that authentic pastoring involves a great deal of saying no to a great number of bids, proposals, claims, entitlements, fantasies, and even sound and holy ideas that have to wait their turn. Care for the whole invariably means the careful refusals that keep things in proportion, husband resources, assign priorities intelligently, and so on.

Well, these and many other currents and projections are at play in the pastoral environment and a contemporary pastoral spirituality will be concerned to help us bring them into the sphere of consciousness so that they can be seen for what they are, understood, and so that we can gain a measure of freedom from them. And this work will have to be done in constant conjunction with the bringing to awareness of what each of us as pastors bring into play, the projections, needs, distortions, and ideals that are largely unconscious. For example, an authentic pastoral spirituality will constantly seek to examine what my inner needs are doing to the business of my pastoring. I do not think most of us were equipped with a spirituality of vocation that fully

acknowledged the extent that we are motivated in ministry by needs. We bring desires to ministry that cry out for fulfillment, and God, so to speak, exploits our recruitability. Most of us have to be pastors out of some inner drive and God is involved in that, messy though it often is, and gives us the Spirit of truth to transform and convert those desires. But that process of conversion involves an asceticism, a discipline of facing and bringing to consciousness the needs we bring to ministry. Needs that are not acknowledged join the shadows and work from behind as demands.

A major element in the spiritual direction of pastors is precisely this bringing into the consciousness and prayer of these inner needs. The need for intimacy motivates us towards personal care of others; if that need is not faced and attended to in the rest of our lives it will intrude upon and distort our pastoral relationships. Some of us are motivated by a deep inner need to reform and correct. We are the enlightened children who will correct the errors and heal the wounds of our parents. Unless we face into that and channel this zeal specifically everyone who comes our way will be subjected to our need to be enlighteners and teachers.

Most obviously a bishop who has not faced quite deeply the part his need to be admired has played in drawing him into ministry is in for a rough ride. Those who obstinately withhold that liking and admiring are going to excite deep rage in him or crushing resentment and depression, all aspects of the same reaction. And of course they will withhold it from anyone exercising pastoral leadership, since a pastoral leader cannot affirm every claim or fulfil every projection, since she has responsibility for the health of the whole rather than the gratification of each part. The demand to be liked can take over; in that case gratifying and affirming all comers will involve abdication of pastoral responsibility for the larger whole.

Pastoral leadership today also requires an area of spiritual awareness that is specifically opening up because of the changes in consciousness that are taking place in our day. The spirituality of pastoral leadership has always been grounded in the gifts of ever-widening empathy, the capacity to identify with and therefore engage with the varied and different elements of the whole. Its most famous expression in scripture is in the passage in I Cor. 9 where Paul speaks of his empathic engagement with the radically different constituencies of Jews, gentiles and those he called 'the weak', those at an immature level of religious awareness, in order to win them. "I have become all things to all people, that I might by all means save some. I do it all for the gospel, so that I may share in its blessings." I have heard many pastors groan at this passage, as if it seemed to propel them into an impossible over commitment or held up an unattainable ideal of versatility. Or I have heard it used in a rather sarcastic tone about pastoral leaders who tend to agree with the last person who spoke to them in a kind of spineless and unprincipled affirmation. "I am afraid our suffragan bishop has turned out to be one of those 'all things to all men' type; where does he really stand on anything?" But authentically this passage points to the type of spirituality we are exploring aloud. To be responsible for catholic community, we need the spiritual gift, the charism, of a versatility of empathic identification with the distinctive constituents of the whole, many of which, because of the way they are embedded in a situation with less perspective, do not see that they need one another, as illustrated in Paul's image of the body whose various parts are tempted to think that they can do without the other organs.



What is becoming especially clear today as we cross the post-modern divide is that this empathic versatility strictly depends on the pastor's consciousness of his or her own particularity and limitation of standpoint. In all sorts of ways we are having to become conscious of the inevitable partiality, bias and restrictedness of our own life-stance. It is fascinating to watch this process happening among pastoral leaders, and being chaplain to the house of bishops has given me hundreds of occasions to observe it. Suddenly it dawns on a leader that his racism is not a matter of personal hostility to people of color, but is rooted in unconscious, unacknowledged unearned white privilege. You can see leaders turning into heterosexuals and some of them even recognizing their heterosexism. Until recently there were no heterosexuals. There was only sexuality, and then some 'perverts' did unspeakable things in some marginal twilight world of unreality. Now the visibility of gays and their claims to have being change reality; the majority sexuality has become one of the ways of being sexual instead of the only one. With the advent of every new woman bishop into the House, the maleness of the House is revealed more vividly and embarrassingly. What used to be how bishops were, what used to be the being of bishops, is now being shown up as how men have acted out being a bishop, not at all the same.

It is an authentic spiritual paradox that the more one brings into consciousness about the narrowness and bias built into one's own experience and identity and viewpoint, the more one is set free to identify with and enter into alliance with those who differ from oneself. Only when has undergone the spiritual death whereby one brings into consciousness and then relinquishes the claim to have *the* take on reality, can one actually begin to empathize with others' take on reality, and in communion with them actually experience more reality. Now part of my motive for tackling the question of pastoral leadership from the standpoint of interiority is that the changes in consciousness that are taking place among us today mean that the connection between the way a pastor behaves and his or her own interiority is becoming more obvious and public. The awful thing is that what we refuse to be conscious of, more and more people can read. The advent of feminism is teaching more and more people to read our fear of women and our incorporation of patriarchal bias; in this new literacy theological rationales have become paper thin, and more and more people can see through what used to seem so substantial, especially arguments from tradition. Actually because a critical mass of people can now 'see through' behaviors dictated by unconscious bias, in an almost automatic social process credibility is being withdrawn from leadership that is not based on wide-ranging and searching self awareness.

Our reflections have lead us into an area of engagement with the changes in consciousness that are occurring with such amazing rapidity at this epoch. Christian spirituality is bound to give priority to Jesus' mandate to discern the signs of the *times* and the spirituality of pastoral leadership requires the capacity to engage with changes and developments at the interior level, at the level of soul. It would take many hours of conversation for us to explore these issues but let me finish this lecture by taking one example of the kind of critical meditation, or 'consideration' we need to engage in as pastoral leaders.

Anglican spirituality is always at risk from the bias towards stability, a kind of homeostatic spirituality in which the Spirit constantly restores order, balance and all godly quietness and virtue in a world peaceably governed by a providence that sets in order all things. If things are changing, prayer expresses confidence that the plan of salvation is being carried out in tranquillity and that all things are being brought to their

perfection. It is beautiful, but it does not provide us with the essential tools for coming to terms with our actual experience at the end of the millenium. We are in the throes of tumultuous and unprecedented changes and an intractable ecological crisis in which the peaceable governance of providence is not exactly what springs to mind. Pastoral leadership in this context is going to need spiritual resources that empower us to integrate into our overarching vision the powers of chaos and accelerating trajectories of change.

There are historic spiritualities in the Christian tradition, ascetical and mystical traditions, that experienced the soul as a sphere of passionate conflict, where a great contest continually occurs between our desire to break through to transformation and our fearful need to stay the same. It is these spiritualities that have received most confirmation and amplification from modern psychology .We have our work cut out to use these resources and others to forge a spirituality in which consciousness of this drama taking place within ourselves will better empower us to lead. For it is in this contest on the macrocosmic scale that pastors will be exercising their leadership of our communities.

It is an irony of language that one of the meanings of the word pastoral is "pertaining to a tranquil rustic scene." A pastoral painting depicts an idealized landscape of calm and beauty with nymphs and shepherds. Now our pastoral scene is in violent contrast, one in which we coming to terms with the necessity of chaos and the inevitability of conflict in communities that evolve or perish. On a train journey here to New York last year I read Michael Crichton's sequel to *Jurassic Park*, a novel called *The Lost World*. One of the characters a mathematician called Ian Malcolm discusses how complex systems such as corporations learn to adapt or face extinction. He goes on to say this.

*But even more important is the way complex systems seem to strike a balance between the need for order and the imperative to change. Complex systems seem to locate themselves at a place we call 'the edge of chaos. We imagine the edge of chaos as a p/ace where there is enough innovation to keep a living system vibrant, and enough stability to keep it from collapsing into anarchy. It is a zone of conflict and upheaval where the old and the new are constantly at war. Finding the balancing point must be a delicate matter -if a living system drifts too close, it risks falling over into incoherence and dissolution; but if the system moves too far away from the edge, it becomes frozen, totalitarian. Both conditions lead to extinction. Too much change is as destructive as too little. Only at the edge of chaos can comp/ex systems flourish.*

This passage, in which chaos theory is being filtered down to the popular level through mass-market literature, is remarkably suggestive about the role of pastoral leadership. It is scary to realize that chaos is vitally central in God's creation and that is why leadership has to be pastoral, a ministry of encouragement and guidance. Pastoral leadership will takes its stand at the place of discernment in this "zone of conflict and upheaval where the old and the new are constantly at war." The episcopal charism of maintaining unity will not consist in repressing the war between the old and the new, but encouraging and continually recentering a community in which we know that both the resources of stability and the risks of change come from the Spirit. What kind of spirituality will enable pastoral leaders to live consciously at the edge of chaos?

## Bonding: Priest and Community

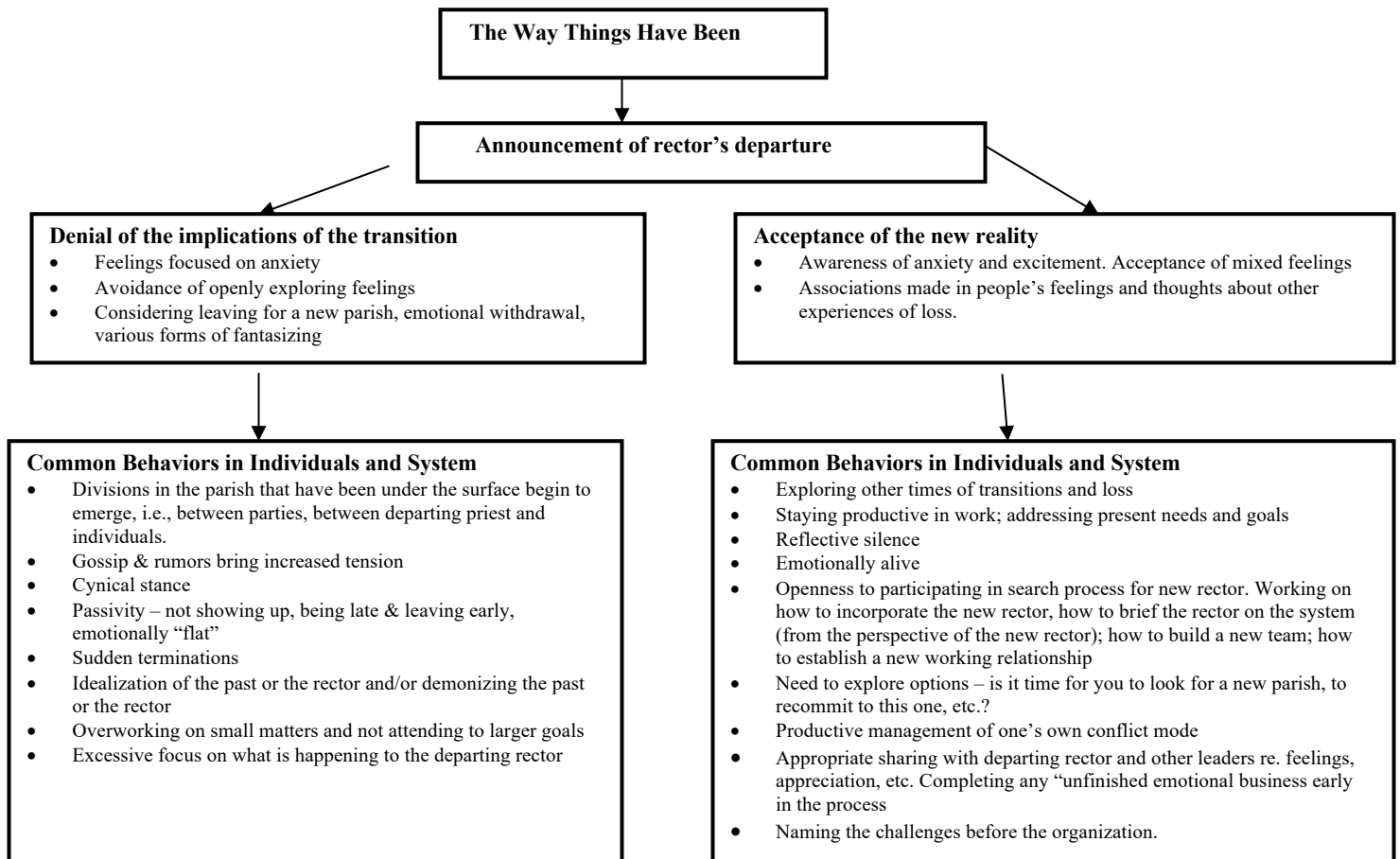
The chart explores the movement in the early years of the relationship between priest and the parish community. The movement parallels what we see in basic group and system dynamics but focused in this case on the relationship between the primary priest of a parish church (rector, vicar, priest-in-charge, etc.) and the community that makes up the parish. In each phase those involved are working out how to accept and engage one another as symbols and as persons. The priest is both symbol (presider, sacramental person, Father/Mother) and person; the community is both symbol (e.g., Body of Christ, People of God) and persons. The temptation is to escape the paradox by fleeing into either the personal or into the symbolic.

Phase	Typical Characteristic, Dynamics, Issues	Group Development Theory: Leadership Issues
<b>Inflated Hopes</b>  Common in years 1-2	A kind of adoration; much like infatuation. The priest may trigger fears, hopes and longings about which we are only vaguely aware. There may be illusionary thinking that assumes the priest will always be available, compassionate, competent, trustworthy; able to solve your problems. It's a fantasy that the priest will be the best of the past without the pain of the past. The priest may have comparable illusions about the parish. If challenged the initial response is likely to be denial that that is what is being expressed. In this phase – the priest and the community do not know each other as persons.	<b>Dependence</b> – The group and leader come together; gather initial impressions of each other, make initial judgments. A new group is being formed. There is usually a time of tentativeness and uncertainty. The leader and members of the group are concerned about being accepted by the other and what the cost of that acceptance will be. The relationship is superficial. Anxiety increases as different styles of working and making decisions begin to become evident. The leader is expected to deal with the group's anxiety and the ambiguity of the situation. This stage will be managed more or less smoothly depending on 1). The degree of working style similarity between the leader and key group members; 2). Their tolerance for ambiguity and 3). The leader's ability to stay present as a person and at the same time as the leader.
<b>Disappointment</b>  Common in years 3-4	This is a time of disillusionment. The priest is not all we hoped for; the congregation is not all the priest hoped for. The priest and the community may both find themselves wanting to escape the frustration and disappointment that comes now. They may back away from each other; develop a kind of resignation to the situation. Or they may have very powerful negative emotions, e.g., despising, disgust, anger. In this phase – the community experiences more of the role the priest is in; the priest is doing many things in a way that fits his/her own personality and hopefully, in ways that bring the ways of the wider church to this local expression of the church. The priest may also be disillusioned with the parish, e.g., "This isn't what the parish profile said."	<b>Counter-dependence</b> – The group and leader experience a time of tension over influence and control. There are more disagreements (some real, some manufactured). People may get more aggressive in attempts to gain influence; others may withdraw. People may begin to focus on differences in order to reestablish their individuality. There is a negative reaction to the feelings of earlier dependency that emerges. There may be a lot of "testing" the leader (or the leader testing the group); initiatives by the leader are commonly resisted. This process continues until the leader and key group members begin to act in more independent and interdependent ways. Beginning to listen carefully, and to offer reasonable suggestions to resolve issues, are critical factors in the group's ability to move beyond this stage.  The degree of struggle and conflict involved usually needs to be contained if the group is to be productive. But this phase is both inevitable and necessary if the leader and the group are to negotiate ways of dealing with power and decision making. Attempts to escape this stage will cause a cycle of moving between the two stages of dependency and counter-dependency.
<b>Realistic Expectations &amp; Relationship</b>  Common in years 4 – 6 and after	This is a period of mature community acceptance of the priest and of the community by the priest. If they manage to stay together and to work out ways of communicating, making decisions, expressing acceptance of their differences, and focusing on common goals – they may experience a sense of mutual respect and mature stability. A feeling of affectation may emerge in time; a kind of realistic love. In this phase the priest as symbol is still there but the community comes to know the person. For the priest the community is still the Body of Christ, a glorious mystery; while also being individuals with their own stories.	<b>Interdependence</b> – Leader and group sort out roles and processes for communicating and deciding. Norms emerge for how we will treat each other and work together. There is more collaboration and a focus on the work to be accomplished. There is a lot of functional behavior that contributes to the task and maintaining good working relationships. A sense of belonging emerges; an acceptance of each other with strengths and weaknesses. Trust is stronger. At higher levels of functioning there is a strong sense of interdependence; of the value of the leader and the member's differences in temperament and skills; of deep appreciation and even affection; and of high productivity.

**The dynamics involved:** There is no avoiding the phases. The priest and parish may move through the phases more or less quickly; may get stuck at a phase, e.g. disappointment that never gets worked through. They may cycle back to earlier stages -- there may be times of regression when the parish and/or key leaders are experiencing a period of high anxiety, threat or helplessness; the recycling may bring deeper insight, increased spiritual and emotional maturity, and closer bonds.

## Transition Dynamics: The Rector's Departure

Here are some of the common dynamics among parish leaders that emerge when the rector leaves. The assumption is that the rector has been in-place long enough to have had a significant impact on the parish and to have established deep working relationships with others. The rector may be moving onto a new position, retiring or leaving because of illness or changes in life circumstances. The ways of working that had been created will change. The nature of relationships will change. Leaders in the parish will begin to experience concerns and hopes about the basic ways of working that have been in place and about their place in the organization. New choices will present themselves.



During the transition it's important for leaders to create a space of hospitality for themselves and others in the organization. This might include offering opportunities to reflect on the past, the “here & now”, and the possible futures. Doing any such reflection in a manner that provides adequate emotional safety and distance from the pressures of the parish. Such opportunities can be initiated by the departing rector, the vestry or a transition team. Both the priest and the parishioners need to “let go” of one another. Behavior that shows intimacy and openness will diminish, the existing patterns of control and influence will weaken, and even the customary signs of inclusion will fade. This can be managed in a way that is graceful. It can also be ignored or poorly done; in which case there will be emotional problems that will haunt the priest and the parish.

It's also important for the departing rector to:

- Allow the other leaders to struggle; avoid attempts to “save” them; do not create detailed plans for what is to happen after departure; also do not accept a “lame duck” position; do not leave before you have left.
- Identify work and goals that are significant “unfinished business” for the parish. Write a few pages that identify 3 or 4 major challenges before the organization.
- Focus on his/her own departure process. The rector needs to experience the death of what has been and his/her excitement about the future.

## Focusing on Strategic Issues

For an organization to develop it needs to give attention to strategic issues: building its capacity through staff development or capital improvements; attending to long range or systemic issues.

		URGENT	NOT URGENT
IMPORTANT	IMPORTANT	<b>I. "THE NORMAL BUSINESS"</b> The regular flow of work that the organization exists to do, including: OCCASIONAL CRISIS PRESSING PROBLEMS DEADLINE PROJECTS (Some mail/phone/meeting)	<b>II. RENEWAL/TRANSFORMATION/DEVELOPMENT</b> RELATIONSHIP BUILDING PLANNING NEW OPPORTUNITIES PREVENTION OF CRISIS BUILDING CAPACITY PEOPLE DEVELOPMENT
	NOT IMPORTANT	<b>III. INTERRUPTIONS</b> - Some mail, phone, meetings, reports - Other people's minor issues	<b>IV. TRIVIA</b> BUSY WORK SOME MAIL/PHONE/MEETINGS TIME WASTERS

### HOW TO IMPROVE

I. <b>MANAGE</b>	II. <b>FOCUS ON</b>
III <b>AVOID</b>	IV. <b>AVOID</b>

#### Ways of Focusing the Organization on Strategic Issues

Spend your energy on establishing structures and processes (i.e., organizational behaviors) that focus on quadrant II). For example:

- A yearly management team retreat
- An all -staff day that contributes to the organization's envisioning process
- Use of an organization development consultant

Giving adequate time to strategic issues is likely to result in an organization that has a sense of vision, balance, discipline, and fewer crises. Covey proposes 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 this area.

# Theory of Interpersonal Relations

## Basic Concerns of Any Group

by Bill Schutz

One of the ways of looking at what happens when people gather in a group includes three basic concerns:

**Inclusion:** *Who else is here?*

*Who can I be in relation to them?*

*What will it cost to join?*

*How much am I willing to pay?*

*Can I trust my real self to them?*

*Will they hold me up if I am falling?*

**Control:** *Who is calling the shots here?*

*How much can I push for what I want?*

*What do they require of me?*

*Can I say what I really think?*

*Can I take it if they say what they really think?*

**Affection:** *Am I willing to care?*

*Can I show my caring?*

*What will happen if I show I care for one person before I show caring for others?*

*What if no one cares for me?*

*What if they do?*

*What if I don't really ever care for some people in the group?*

*Will the group be able to bear it?*

When confronted by the end of its life together, the process tends to reverse itself from I-C-A to A-C-I.

- We begin to pull back a little from affectional ties we know have no real future.
- We begin to get embroiled again in a game of "Who's boss here anyway?"
- We start to wonder if we really want to put in the time and effort to stay with the group.

It is important to realize that these concerns overlap during the life cycle of a group, although one of the three concerns may be more dominant than the others at any given period of time.

## ICA Questions

### Inclusion questions

Some members frequently participates more than others, is there any member including yourself ,who, in your opinion participated more than others? And how did you handle it?

Is their anyone, in your opinion, who seemed to withdraw from the group and hardly participate at all? And how did you handle it?

Is their someone in the group who tries to give the impression that he is a high status member of the group and what he has to say should be listened to? And how did you handle it?

In many groups there is some member who's mood seems to be contagious in the group? Whether joking or light hearted, very serious and intent, or perhaps sarcastic and ridiculing? How did you respond to this person?

### Control Questions

In some groups there is a member who disrupts the groups functioning by being bossy, dominating and aggressive? In your opinion is there any member, including yourself that did this? What did you do?

Was there anyone, in your opinion, who didn't take on their share of the responsibilities?

Who seemed to have the most influence? What did the person do?

Is there anyone who seemed to have exceptionally good ideas? Anyone who for any reason didn't seem to grasp basic principles?

### Affection Questions

Is there anyone in the group who seemed to try excessively hard to be liked?

It often happens that some group members give the impression that they don't care at all whether people like them or not? Is there any one in this group who gave you that impression?

In many groups there is someone who seems mainly to be the only one who promotes and maintains good personal feelings among the group members. He will frequently do things to make the members feel comfortable and at ease with each other. Act supportive and mediate in situations, Any member in your group performed this function? How did you respond?

Susan Adam 2006

# Stages of Team Development

When a group of people are first formed into a team, their roles and interactions are not established. Some individuals may merely act as observers while they try to determine what is expected from them while others may engage the process immediately. There are many models that describe team developmental progression. They are similar and suggest that the process occurs in four predictable stages. Each stage is characteristically different and builds on the preceding one. The implication is that all teams must develop through this predetermined sequence if they are to be fully functioning teams.

## Four Stages of Team Development

Stage 1: Forming

Stage 2: Storming

Stage 3: Norming

Stage 4: Performing

### Stage 1: Forming

The Forming stage of team development is an exploration period. Team members are often cautious and guarded in their interactions not really knowing what to expect from other team members.

- ◆ They explore the boundaries of acceptable behavior.
- ◆ Behaviors expressed in this early stage are generally noncommittal.

Some questions raised during this stage of development are:

- ◆ Do I want to be part of this team?
- ◆ Will I be accepted as a member?
- ◆ Who is the leader?
- ◆ Is the leader competent?

### Stage 2: Storming

The Storming stage of development is characterized by competition and strained relationships among team members. There are various degrees of conflict that teams experience but basically the Storming stage deals with issues of power, leadership, and decision making.

- ◆ Conflict cannot be avoided during this stage
- ◆ It is the most crucial stage the team must work through.

Some questions raised during this stage of development are:

- ◆ How will I seek my autonomy?
- ◆ How much control will I have over others?
- ◆ Who do I support?
- ◆ Who supports me?
- ◆ How much influence do I have?



## Stage 3: Norming

The Norming stage of team development is characterized by cohesiveness among team members. After working through the storming stage, team members discover that they in fact do have common interests with each other.

- ◆ They learn to appreciate their differences.
- ◆ They work better together.
- ◆ They problem solve together.

Some questions raised during this stage of development are:

- ◆ What kind of relationships can we develop?
- ◆ Will we be successful as a team?
- ◆ How do we measure up to other teams?
- ◆ What is my relationship to the team leader?

## Stage 4: Performing

The Performing stage of team development is the result of working through the first three stages. By this time, team members have learned how to work together as a fully functioning team-

- ◆ They can define tasks.
- ◆ They can work out their relationships successfully.
- ◆ They can manage their conflicts.
- ◆ They can work together to accomplish their mission.

From The ASTD Trainer's Sourcebook: Teambuilding, by Cresencio Torres and Deborah Fairbanks. McGraw-Hill, 1996. Used with permission.

# Feelings

## Sad

Bleak  
Blue  
Crestfallen  
Depressed  
Devastated  
Disconsolate  
Empty  
Grieving

Grim  
Helpless  
Hopeless  
Melancholy  
Mournful  
Sorrowful  
Woebegone  
Woeful

Dejected  
Discouraged  
Dismal  
Dispirited  
Down  
Downcast  
Heavy  
Lonely

Moved  
Shame  
Solemn  
Sullen  
Unhappy

Ashamed  
Bored  
Cheerless  
Disappointed  
Embarrassed  
Hurt  
Pained  
Somber

Morose

Uninterested

## Afraid

Alarmed  
Distressed  
Fearful  
Frightened  
Ghastly  
Panic-stricken  
Petrified  
Scared  
Shocked  
Terrified

Agitated  
Anxious  
Apprehensive  
Fainthearted  
Insecure  
Jittery  
Nervous  
Perturbed  
Pessimistic  
Shaky

Startled  
Tense  
Troubled  
Uptight  
Worried

Concerned  
Coy  
Diffident  
Doubtful  
Dubious  
Edgy  
Fidgety  
Restless

Timid  
Timorous  
Uneasy  
Unsettled  
Unsure  
Vulnerable

## Mad

Angry  
Boiling  
Enraged  
Fuming  
Furious  
Hateful  
Hostile  
Infuriated

Aggravated  
Exasperated  
Frustrated  
Incensed  
Indignant  
Inflamed  
Vengeful  
Worked-up

Animosity  
Enmity  
Ireful  
Irked  
Miffed  
Peeved

Sore  
“Teed off”  
Uneasy  
Unhappy  
Unsettled  
Vexed

## Glad

Alive  
Cheerful  
Delighted  
Ecstatic  
Elated  
Energetic  
Excited  
Exuberant  
Happy  
Jubilant

Comfortable  
Content  
Enchanted  
Exalted  
Exquisite  
Gay  
Gleeful  
Hilarious  
Jolly  
Jovial  
Lighthearted

Peaceful  
Pleased  
Rapturous  
Serene  
Spirited  
Vibrant  
Warm  
Zestful

Blithe  
Blithesome  
Tranquil

## BRAINSTORMING AND PRIORITIZING PROCESS

This is a process for generating ideas about a topic or issue and selecting the ideas that the team believes has the most to offer in the situation.

### 1. Remind the team of the norms for brainstorming:

- + Offer whatever idea comes to mind. We want as many ideas as possible. We want ideas that seem obvious and we want ideas that may seem "far out".
- + No discussion or evaluation of anyone's ideas as we are gathering them. Keep the ideas coming in a stream. We want to keep the team's energy up and focused on producing as many ideas as possible.

### 2. On newsprint, identify the issue to work with and proceed to gather ideas

Issue: _____
Date _____
<b>WISHES</b>
1. _____
2. _____
3. _____

It may help to invite people to "wish" in relationship to the issue.

Use as many sheets of newsprint as needed. It will help the flow if several sheets are hung across the wall at the beginning. That will avoid an interruption because of the need to hang more newsprint. It may be useful to set a time limit for how long you will brainstorm.

If the group is larger than ten, try using two people at the newsprint, the lead facilitator and a supporting recorder. The two facilitators take turns receiving ideas and writing them on newsprint. This tends to help pick up the pace.

### 3. Prioritize

When the group has gotten out all its ideas on the issue its time to prioritize. The team is trying to decide which of the ideas offers the most possibility of success in addressing the issue.

Give each team member one vote for every three or four ideas on the newsprint. Everyone comes up to the newsprint to indicate their vote by placing a check mark near the number assigned to the idea. Do not try to "group" or narrow down the list

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## Facilitator Skills – Feedback Form (3 is high, 1 is low)

SKILL	Facilitator #1	Facilitator #2	Facilitator #3	Facilitator #4	Facilitator #5
1. Helping the team stay with the task and the process					
2. Effective use of the method or tool					
3. Kept it moving! - an appropriate pace					
4. Recorded in the words of the speaker					
5. Showed energy					
6. Kept newsprint visible					
7. Did not "screen"					
8. Did not use role to push/sell own ideas					

### **Process**

1. In space for facilitator rating ("Facilitator #1, etc.) each person record a rating. The facilitator that is receiving the feedback begins by rating herself/himself.
2. After all ratings are recorded -- explore any area that draws your interest (e.g., ratings are mixed 1's vs. 3's, or all are high or low)
3. Then have a brief conversation using the following format, facilitator begins by sharing a self assessment; others follow.
  - a. What I most liked about my/your facilitation is .....
  - b. What I wish I/you had done differently is ...

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# THE JOHARI WINDOW

## A Graphic Model of Awareness in Interpersonal Relations

by Joseph Luft

Like the happy centipede, many people get along fine working with others, without thinking about which foot to put forward. But when there are difficulties, when the usual methods do not work, when we want to learn more, there is no alternative but to examine our own behavior in relation to others. The trouble is that, among other things, it is so hard to find ways of thinking about such matters, particularly for people who have no extensive backgrounds in the social systems.

When Harry Ingham and I first presented The Johari Window to illustrate relationships in terms of awareness (at W.T.L., in 1955), we were surprised to find so many people, academicians and nonprofessionals alike, using and tinkering with the model. It seems to lend itself as a heuristic device to speculating about human relations. It is simple to visualize the four quadrants which represent The Johari Window.

	Known to Self	Not Known to Self
Know to Others	I Area of Free Activity	II Blind Area
Not Known to Others	III Avoided or Hidden Area	IV Area of Unknown Activity

Quadrant I, the area of free activity, refers to behavior and motivation known to others.

Quadrant II, the blind area, where others can see things in ourselves of which we are unaware.

Quadrant III the avoided or hidden area, represents things we know but do not reveal to others (e.g., a hidden agenda or matters about which we have sensitive feelings.)

**Quadrant IV** area of unknown activity. Neither the individual nor others are aware of certain behaviors or motives. Yet we can assume their existence because eventually some of these things become known, and it is then realized that these unknown behaviors and motives were influencing relationships all along.

## The Quadrants and Changing Group Interaction

In a new group, Quadrant I is very small; there is not much free and spontaneous interaction. As the group grows and matures, Quadrant I expands in size; and this usually means we are freer to be more like ourselves and to perceive others as they really are. Quadrant III shrinks in area as Quadrant I grows larger. We find it less necessary to hide or deny things we know or feel. In an atmosphere of growing mutual there is less need for hiding pertinent thought or feelings. It takes longer for Quadrant II to reduce in size, because usually there are ..good.1 reasons of a psychological nature to blind ourselves to the things we feel or do. Quadrant IV perhaps changes somewhat during a learning laboratory, but we can assume that such changes occur even more slowly than do shifts in Quadrant II. At any rate, Quadrant IV is undoubtedly far larger and more influential in an individual's relationships than the hypothetical sketch illustrates.

The Johari Window may be applied to *intergroup* relations. Quadrant I means behavior and motivation known to the group and also known to other groups. Quadrant II signifies an area of behavior to which a group is blind; but other groups are aware of this behavior; e.g., cultism or prejudice. Quadrant III, the hidden area, refers to things a group knows about itself but which are kept from other groups. Quadrant IV, the unknown area, means a group is unaware of some aspect of its own behavior, and other groups are also unaware of this behavior. Later, as the group learns new things about itself, there is a shift from Quadrant IV to one of the other quadrants.

## Principles of Change

- A change in anyone quadrant will affect all other quadrants.
- It takes energy to hide, deny, or be blind to behavior which is involved in interaction.
- Threat tends to decrease awareness; mutual trust tends to increase awareness.
- + Forced awareness (exposure) is undesirable and usually ineffective.
- Interpersonal learning means a change has taken place so that Quadrant I is larger and one or more of the other quadrants has grown smaller.
- Working with others is facilitated by a large enough area of free activity. It means more of the resources and skills in the membership can be applied to the task at hand.
- The smaller the first quadrant, the poorer the communication.
- There is universal curiosity about unknown areas, but this is held in check by custom, social training, and by diverse fears.
- Sensitivity means appreciating the covert aspects of behavior in Quadrants I, III, and IV and respecting the desire of others to keep them so.

- Learning about group processes as they are being experienced helps to increase awareness (larger Quadrant 1) for the group as a whole, as well as for individual members.
- The value system of a group and its membership may be noted in a way *unknowns in the life of the group are confronted*.

A centipede may be perfectly happy without awareness, but after all, he restricts himself to crawling under rocks.

# CORE COMMUNICATION & FEEDBACK SKILLS

## Communication Skills

**Paraphrase** - saying back to the speaker what you heard them say. The goal is to accurately grasp the content of their idea. You may either repeat exactly what was said or you may summarize, restate the essence of what the speaker said.

- A useful method is to begin your response with "***I hear you saying ...***"

**Itemized Response** - this involves giving a full response to a person's idea by telling them what you like/appreciate/can use in their idea and what concerns you about the idea. The assumption here is that it helps the group's work when we enable participation and seek what may be of value in each idea. Itemized Response helps: keep unformed but possibly useful ideas alive, establish a supportive group climate, and helps us see the fullness of an idea.

A useful method is to frame your responses using the following:

***"What I like about it is ...."***      ***"What concerns me is ..."***

**Active Listening** - trying to state the feelings and underlying message that the speaker is communicating. Stating this as something you are "testing" rather than as a "truth". Allowing yourself to be corrected as the person restates their message.

**Making Statements Rather than Asking Questions or Sharing Opinions** - this is to enable the group to stay with the issue being worked on. Frequently questions are really hidden statements, e.g., "don't you think it would be better if ...". Opinion sharing may better fit after work with beer or coffee.

The use of core communication skills:

- Tends to help focus the group's discussion. It reduces repetition and explaining "what I really meant to say ..."
- Important in de-escalating conflict; also in preventing misunderstandings. It provides everyone with a way to build agreements, clarify misunderstandings, and negotiate.
- Helps the group build on each other's ideas. Builds trust and strengthens relationships.
- Requires "group discipline" - using the skill even when it feels awkward; giving energy to it; putting aside your own judgments for the moment; being congruent in the body language and tone of voice.
- You are working to respect others and yourself in a manner that is responsive and assertive rather than evasive, passive or aggressive. The skills assume that you are ready to give positive attention to the other person rather than only appearing to be engaged and listening.

## Feedback Skills

Feedback may have several purposes – it may be information that expands a person's information about themselves and the effect they have on others; it may expand the person's range of choices; and it may be intended to support or discourage certain behavior.

Feedback is likely to be more effective if:

- The person receiving it acknowledges the need for it; especially if the person requests it
- It is timely; given near the time the behavior has occurred
- It is skillful

## Skillful Feedback

- Be descriptive, provide information that describes the behavior and its impact on you; restrict the feedback to what you know (e.g., behavior you have seen and how it has impacted you).



- It is about the giver of the feedback, not the person receiving the feedback. It is an exploration of the effect the person's behavior has had on you. (note – the same behavior may not have that effect on others).
- Avoid exaggeration ("you always get this wrong"), labeling ("you are stupid"), and judgment
- Speak for yourself ("what I feel/experience when you ...." ) not for others ("Everyone gets upset when you ....")
- Don't press the person for any immediate response
- Face to face – not by e-mail

## Skillfully Receiving Feedback

- Listen – if something helps you to listen do that, e.g., take notes, ask someone else to make notes on the feedback so you can focus on the speaker
- Ask questions to clarify – "could you give an example of that?", "when did that happen?", "who else was there?"
- If others were present during the behavior the feedback is about; ask them to offer feedback, what was the effect on them
- Acknowledge valid points
- Open yourself. Do not get defensive (you may feel it, don't act it). Stay focused on hearing what is being said.
- Take time to think about what has been said; if a response is necessary tell those offering the feedback that you will think about it and offer some response on a specific date.

### A formula for giving feedback

1. "When you ....."                      Note the behavior; describe it as specifically as possible.
2. "I felt ...."                                Tell how the behavior affects you. This is just one or two words – frustrated, angry, pleased, etc.
3. "Because I ..."                             Share why you are affected that way.

### From Feedback to Negotiation of the Relationship

4. "I would like ..."                         What would you like the person to consider doing.
5. "Because ..."                                Why you believe it will help
6. "What do you think?"                     Invite and hear the response; explore options

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## Thinking and Feeling

Thinking and feeling are the two major ways by which we interact with our interpersonal environment. Both are essential to constructive communication. In general, thinking ("head talk") leads to an *explanation* of the interactive situation, while feeling ("gut talk") leads to an *understanding* of it. Head talk is the prose of communication; gut talk is the poetry.

"Think" statements refer to the denotative aspects of the environment. They attempt to define, assert, opine, rationalize, or make causal connections between environmental events. Think statements are bound by the rules of logic and scientific inquiry; they may be true or untrue. Many times a think statement can be proven or disproved. Think statements require words to be communicated.

Most of us have been trained to emit thinking statements exclusively. We are constantly engaged in cognitive work: observing, inferring, categorizing, generalizing, and summarizing; occasionally we report to others what goes on in our head. Frequently we are asked for facts ("Where did you put the car keys?"), opinions ("Which tastes better, California or imported wine?"), speculation ("What happens when we achieve zero population growth?"), or even indefinite thoughts, sometimes, just a "What are you thinking about?" Human beings like to think, and our ability to do it is usually on the short list of characteristics which distinguish us from orangutans.

Laboratory learning places great emphasis on feelings. Many participants in groups learn quickly that beginning sentences with "I think" is bad form, so they preface their remarks with "I feel" and go on to report thoughts. This bogus use of "I feel" often muddles communication.

1. "I feel like having a drink" is no expression of feeling but merely a shorthand way of saying, "I'm thinking about having a drink, but I'm still undecided." Here, "feel" is used to express an indefinite thought.
2. "I feel that Roger's brashness is a cover for his insecurity" is not an expression of feeling but a statement of opinion, an offering of an hypothesis.
3. "I feel that all men are created equal." An abstract principle can't really be felt; this is a *statement of belief*, an expression of faith in someone or something. It is really more accurate to say, "I believe that all men are created equal."

Watch yourself when you say, "I feel *that...*" It's a tip-off that you are making a think statement, with a feel prefix.

"Feel" statements refer to the connotative aspects of the environment. They attempt to report our internal affective, immediate, non-rational, emotional, "gut" response to environmental events. Usually, feel statements are personal and idiosyncratic in that they refer to inner states, what is happening inside of us. Feel statements, like dreams, cannot be true or false, good or bad, but only honestly or dishonestly communicated. Feel statements may not require words at all; when they do, they usually take the form of "I feel {adjective}" or "I feel {adverb}."

Many of us have conditioned ourselves to screen out awareness of internal reactions. We may allow ourselves to report feeling "interested" or "uncomfortable," but deny ourselves more intense or varied reactions. Laboratory learning emphasizes feeling states precisely because of this conditioning and denial. By getting in touch with our inner events, we enrich our experiences with the reality surrounding us.

Changes inside of us provide direct cues to the feelings we are experiencing. A change in bodily function muscle tightness, restlessness, frowning, smiling, inability to stay with a conversation --tells us how we are reacting to what is happening. The sudden emergence of fantasies, impulses ("I want to go over and sit by Kathy") or wishes ("I wish Tom would shut up") into our consciousness can provide immediate entry into the rich and productive area of feeling communication if we can express them.

Sometimes we can also become aware of what is blocking our awareness of what we are experiencing. *Shame* is one kind of block, especially when the impulse sounds childish or regressive. *Fear* that if we communicate wishes, overt behavior will result is another bugaboo. It is a left over from the magical thinking of childhood. Often, we have a clear *expectation of judgment* from others if we dare to express ourselves. In a well-functioning group, these blocks do not correspond to reality. It can be truly liberating to express your feelings without shame, fear, or judgment.

### SOME PITFALLS IN DEALING WITH FEELINGS

*Projection* occurs when we deny our own feeling and attribute it to another. It is a common happening in groups and involves many distortions. Frequently, projections are made in an attempt to justify our own biases and prejudice.

*Judging motives* in others is guesswork which escalates misunderstanding. It is a sly way of focusing on another's feelings instead of your own and an entry into the intriguing but time-wasting game of explaining *why* someone is feeling the way they do. If you want to read minds, start with your own.

*Metafeelings* are thoughts and feelings about feelings. Metafeelings garble communication and often make it impossible to know where you are coming from. It is a way of distancing yourself from the immediate event and you run the risk of intellectualizing a potentially rich feeling experience. Beware of exchanges which begin, "I'm sort of guessing that when I think I'm sort of feeling that. .." You will get nowhere.

### OWNING YOUR THOUGHTS AND FEELINGS

Effective communication occurs when the communicators take responsibility for their thoughts, feelings and overt behavior, when they *own* what they do. Blaming, imputing motives, claiming that "the devil made you do it" are sneaky, dishonest attempts to be irresponsible. When you own your thoughts and feelings, the other person knows where you are and can respond more authentically to you.

The T -Group provides an excellent opportunity for individuals to consciously examine his/her use of thinking and feeling statements. Frequently, a facilitator will raise the issue when a statement is misused. Sometimes the participant discounts this clarification and thinks the facilitator is being too "picky"; however, focusing on the language usage helps us determine what our actual thoughts and feelings really are sometimes activities can help sharpen the usage. For example, an individual or group can practice negative behavior such as, blaming or imputing motives, and then process the experience. Another exercise is to devise a list of think statements and masquerade them as feel statements. Whatever the process used to draw attention to the statements, the result is greater consciousness of our language about feeling and thinking and the congruence with behavior.

-- Adapted from 1983 Annual Handbook of Group Facilitation: University Associates

# SWOT

## Strengths, Weaknesses, Opportunities, Threats

1. Hang newsprint and label.

Internal	
S	W

External		
O	Forces	T

2. Start with identifying Internal Strengths and Weaknesses
  - a. Have the focuser (and participants) offer strengths and weaknesses.
  - b. Prioritize.
3. Identify external forces that impact the organization/department being assessed.
4. Prioritize forces - which are having the greatest impact?
5. Identify possible opportunities (O) or threats (T) related to the top forces.
  - prioritize
6. If not done before, prioritize among S/W and O/T.
7. State possible strategic issues based on top S/W, O/T.

Additional Steps (if time allows, if it is appropriate for this team's work)

8. Change top strategic issues into strategic goals.

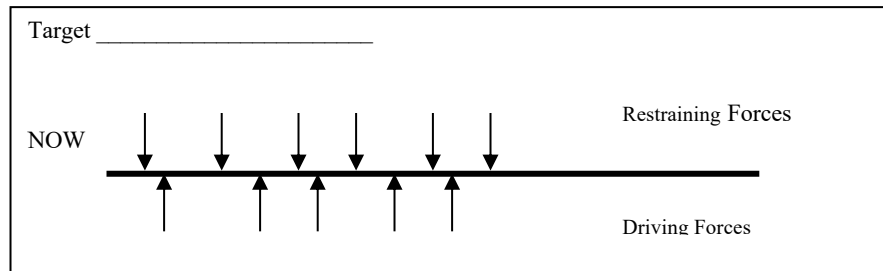
9. Possibly incorporate into larger vision statement.

10. Develop a plan for addressing the strategic goals.

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# FORCE FIELD ANALYSIS

## 1. Set up figure



## 2. Identify - "now", current state

## 3. Identify target

## 4. Identify driving and restraining forces (Brainstorm style)

## 5. Prioritize forces - Focuser or Group vote

## 6. Strategy Formation (new color)

- Identify ways of reducing power of the "restraining forces"
- Identify ways of using/increasing power of existing "driving forces"
- Add new driving forces

## 7. Prioritize Strategies - Focuser or Group vote

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# 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.

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## TESTING PROCESS

Testing is a method for setting boundaries and addressing emerging issues. It allows a parish to hear itself as a body. Issues can become “owned” by the parish community. The parish can sort out what it sees as important verses what a few people are pushing as a private agenda.

A “testing” process can help the parish cope with situations in which a few persistent voices press a concern or idea that would have an effect on the parish’s life. What they are saying may represent a widely shared view or it may simply be their view. Those expressing the issue may not really know how many they speak for. Imaging the informal one-on-one coffee break discussion. Someone is making the rounds, letting others know about an important problem. People are listening and even nodding. Is it agreement or politeness?

The use of a “testing process” requires leaders to use sound judgment in deciding when the process is likely to produce valid and useful information and help the system manage its anxiety. Overuse may result in an increase in the community’s anxiety, less listening, and ineffective action. However the danger in most places is not overuse but the absence of any way for the community to define itself in relationship to emerging issues. A rule of thumb might be to use a “testing process” about four times/year with the whole community and possibly ten times with a management team or the board.

A possible process is to identify the issue; put it on a spectrum of some sort; have people indicate where they are on the spectrum; and summarize the result, along with what any next step will be, if any.

An example: in a parish church where several people had been complaining about the extent of the parish’s involvement in the arts.

A spectrum was created –

***Regarding the parish’s involvement with the city’s art community:***

Too Much Involvement	About Right	Too Little Involvement

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## PARTICIPANT ROLE IN A TEAM

### A. Help the team accomplish its task, by appropriately:

1. Checking out the team's acceptance of the task, objectives for this meeting, overall vision of the organization, etc.
2. Offering ideas
3. Clarifying the issue, stating options
4. Asking for/offer information useful at this point in the team's work
5. Testing the team's readiness to make a decision, move to a next step
6. Summarizing information
7. Testing assumptions
8. Using communication skills - paraphrase itemized response, etc.
9. Assisting with time management
10. Generally helping to organize the work
11. Being self-directed in your work

### B. Help the team maintain working relationships, by appropriately:

1. Facilitating inclusion and acceptance
2. Offering positive feedback, support and encouragement
3. Helping to manage conflict
4. Facilitating communication

### C. Help the team, by not:

1. Arriving late or leaving early
2. Ignoring or violating team norms/guidelines without acknowledging and asking the group if it is acceptable or whether it will be so distracting that you should leave the team
3. Having side conversations
4. Withholding information the team could use
5. Building up resentment toward others in the team or the whole team
6. Engaging in dominating, cynical or passive behavior
7. Attacking others, "put downs", "Yes, buts" toward other people's ideas

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## RECORDING ON NEWSPRINT: SOME HINTS

1. Title, number and date all sheets
2. Use dark colored markers - black, blue, and purple - so it is easier for people to read. Other colors are useful for underlining, diagrams, etc.
3. If newsprint is being hung on a wall, always have a backing sheet under the one you are writing on to allow for the marker "bleeding"
4. Consider using dry erase markers - it allows you to move back and forth between newsprint and a white board, eliminates the possibility of using a permanent marker on a white board.
5. Decide on whether to use a white board or newsprint -- a white board is useful for teaching purposes when the participants are taking notes; newsprint is useful when you will be using the material again at another meeting and when the team will be producing enough work that it will need a lot of space.
6. Keep newsprint visible -- do not cover, "flip" it over, etc. This allows people to build on each other's ideas and reduce repetition. Try to keep it hanging in the order it is produced.
7. Write large enough to be seen by people most distant from the newsprint.
8. Tell yourself that you are allowed to misspell words.
9. Storage -- roll up the newsprint, wrap an 8 1/2 x 11 sheet around the roll, tape it, write on the sheet the date, topic and group. Store in a wicker trash basket.

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## METHODS FOR INCREASING PARTICIPATION IN MEETINGS

### 1. Use group decision-making processes

- The process needs to be known by everyone, i.e., be part of the “common language” of the system
- You can teach or rehearse some processes just before using them, making it part of the “common language”
- Examples of common processes are: Brainstorming & Prioritizing, Force Field Analysis, SWOT, Likes/Concerns/Wishes, Testing, Channeling, Problem Solving Process, Mirroring

### 2. Use a trained facilitator who will use skills understood by all/most of the participants

3. Provide a common understanding of basic roles (i.e., participant, facilitator, focuser) and the skills that go with each.

4. Use subgroups -- breaking the larger group down into subgroups usually helps increase the participation of those who may be more introverted or hesitant about participating. Sub-grouping is also useful as a way of “jump starting” a team as it begins its work in a new area, on a topic that is difficult to talk about, or when people are tired.

5. Provide time for individuals to write down their ideas before starting work on an issue -- allows some people to think it through before having to say something to the whole team; a variation is to have people fill out a short survey and collate the information for the team to explore.

6. Avoid using team time for updates, reports, information sharing. These activities reduce participation and tend to reduce a team’s energy level.

- If you need to do the above -- create a participatory process that allows people to respond or engage the report or information, e.g., Likes/Concerns/Wishes
- Cut down on the time given to information sharing and reports by using a very disciplined process with a time limit for each person and the whole activity; put it in writing, put them at the end of the meeting; separate these activities into a separate meeting that is short and only for reporting (try doing it as a “stand up meeting”).

7. Use a norm checking process -- a process for developing, maintaining and changing team norms. Such a process allows the team to participate in deciding how it will do its work (it helps if the team has received some training in team processes).

- reinforce norms that help participation, e.g., no attacks, use of IR (itemized response), if you generate the idea it doesn’t mean you have to do it.

### 8. Use “warm up” exercises

9. Assign roles - timekeeper, making the coffee, etc.

10. Provide positive feedback for participation.

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# CONGREGATIONAL DEVELOPMENT LEADERSHIP/CONSULTANT ASSESSMENT

Robert A. Gallagher, Organization Development Consulting & Training  
 Director, The Church Development Institute, Seattle. WA

This assessment is for:

Address

Phone

E -Mail

- A. This assessment is on the person's skills and knowledge as a (circle one):
  - 1. Congregational development leader
  - 2. Congregational development consultant
- B. This assessment is a (circle one):
  - 1. Self-assessment
  - 2. Peer assessment (by someone trained in congregational development)
  - 3. Congregational leader assessment (a member and leader of the congregation)
  - 4. Client assessment (for a consultant)

C. Evaluator's Name \_\_\_\_\_  
 Address \_\_\_\_\_

Phone \_\_\_\_\_

D. Please describe the specific settings in which you have observed the person's performance as a leader or consultant (e.g., "I was a lay leader in a congregation where Mary was the pastor. She lead us in a long term process of moving from decline into a stronger spirituality and membership growth.")

E. Rating - Please apply this rating scale to the items that follow. Indicate with an "X" response, those areas where you do not have adequate information to give a rating.

Very Low Competence	1	2	3	4	5	6	Very High Competence
---------------------------	---	---	---	---	---	---	----------------------------

## CONGREGATIONAL AND ORGANIZATION DEVELOPMENT

1. Can clearly articulate what congregational development and organization development is; what the objectives and assumptions are. \_\_\_\_\_
2. Understands and can facilitate the process of planned change in a manner appropriate to role. \_\_\_\_\_
3. Can facilitate the congregation in establishing a clear direction and vision, which is grounded in the Church's mission and identity; that attends long-term, systemic development; that fits the particular congregation; and that places immediate needs and crises within a broader approach to the parish's development. \_\_\_\_\_
4. Can help the congregation navigate toward the congregation's chosen direction \_\_\_\_\_
5. Can enable the congregation to manage the dynamics of the transformation process, including dealing with conflict and resistance; managing the polarity of change and stability; putting in place the structures, processes and climate needed for development; developing leaders in the congregation. \_\_\_\_\_

## THEOLOGY AND SPIRITUALITY

6. Can help congregational leaders relate the ministry of congregational development to Anglican identity and spirituality. \_\_\_\_\_
7. Can help the congregation explore the role of the Eucharist in shaping the community. \_\_\_\_\_
8. Can articulate the relationship between their leadership or consultant role and their own spiritual life. \_\_\_\_\_
9. Can help priests and congregations explore and act on the relationship between the priest's presiding in the community's life and presiding in the Eucharist. \_\_\_\_\_

## OVERALL LEADER/CONSULTANT STYLE

10. Has a clear intention and actions directed at increasing the organization's competence for self-management, ability to solve problems and address opportunities, capacity to adapt to new conditions and learn from experience \_\_\_\_\_
11. Effectively manages dependency issues. \_\_\_\_\_

## ETHICS

12. Recognizes the boundaries of his/her competence and operates within those boundaries (i.e., doesn't offer services for which he/she is not adequately trained) \_\_\_\_\_
13. Serves in a manner that is respectful, timely, and thorough. \_\_\_\_\_
14. Does not misrepresent qualifications, training or intentions. \_\_\_\_\_
15. Makes the limits of confidentiality clear \_\_\_\_\_

- 16. Responsibly manages financial matters \_\_\_\_\_
- 17. Responsibly manages issues of sexuality and intimacy \_\_\_\_\_
- 18. Responsibly deals with issues of power and influence \_\_\_\_\_

SYSTEM AND ORGANIZATIONAL THEORY AND INTERVENTION

- 19. Has several frameworks for helping the congregation assess itself as a Christian community with unique dynamics and goals (e.g., The Shape of the Parish, Renewal-Apostolate Cycle, The Christian Life Model, the Benedictine Promise, Nature and Mission, Analogies and Images, etc.) \_\_\_\_\_
- 20. Understands and can help a congregation assess itself in relationships to frameworks in the following areas:
  - a. Organizational life cycles as applied to the congregation -----
  - b. Organizational subsystems -----
  - c. Size -----
  - d. Dynamics of change and stability -----
  - e. In relationship to the external forces and trends of the larger society and Church \_\_\_\_\_
  - f. Organizational Culture \_\_\_\_\_
- 21. Assessing the effect of her/his activities on the congregation \_\_\_\_\_
- 22. Helping the organization to accurately identify their opportunities and problems and to develop effective strategies for development. \_\_\_\_\_

INTERVENTION THEORY AND PRACTICE

- 23. Displays an understanding of intervention theory. \_\_\_\_\_
- 24. Has the ability to facilitate a congregation in a variety of interventions, including:
  - a. Diagnostic activities (data gathering and diagnosis) \_\_\_\_\_
  - b. Planning and envisioning activities \_\_\_\_\_
  - c. Team building \_\_\_\_\_
  - d. Education and training (activities to improve the competence of individuals or teams) \_\_\_\_\_
  - e. Strategy formation and problem solving activities (e.g. force field analysis, SWOT, etc.) \_\_\_\_\_
  - f. Techno-structural activities (to improve the effectiveness of technical or structural forces affecting people). \_\_\_\_\_
- 25. Shows an understanding of the relationship of intervention theory and methods to role (e.g., manager/pastor, external consultant, internal consultant, internal change agent) \_\_\_\_\_

- 26. Makes sound judgments about when to focus on changing/strengthening the organizational culture and when to focus on increasing individual competence; also how to relate both. \_\_\_\_\_
- 27. Demonstrates a working knowledge of a variety of theories of congregational/organization development, leadership and management, etc. \_\_\_\_\_
- 28. Introduces theory in an appropriate manner (fits the congregation's concerns/needs/issues) \_\_\_\_\_

GROUP DEVELOPMENT AND TEAM FACILITATION SKILLS

- 29. Shows an understanding of group development theory. \_\_\_\_\_
- 30. Competence as a small team facilitator (up front skills, energy, etc.). \_\_\_\_\_
- 31. Competence as a facilitator of large groups. \_\_\_\_\_
- 32. Uses a variety of methods to help teams work on their tasks. \_\_\_\_\_
- 33. Helps teams to develop clear priorities. \_\_\_\_\_
- 34. Helps teams deal effectively with conflict. \_\_\_\_\_
- 35. Creates a trusting climate in a team. \_\_\_\_\_
- 36. Uses methods to develop self-managing teams. \_\_\_\_\_
- 37. Helps a team to effectively deal with its task and manage its relationships. \_\_\_\_\_
- 38. Makes sound judgments about when to emphasize team building and when to emphasize mobilizing and equipping individual strengths and interests. \_\_\_\_\_
- 39. Makes sound judgments about emphasizing interdependence and collaboration and when to emphasize individual autonomy and competence. \_\_\_\_\_

INTERPERSONAL AWARENESS AND SKILL

- 40. Understands his/her own facilitation style and its effect on people. \_\_\_\_\_
- 41. Maintains clear and appropriate boundaries and connections with the people with whom she/he is working. \_\_\_\_\_
- 42. Able to stay in role and also stay connected; able to be empathetic and function in role \_\_\_\_\_
- 43. Shows positive concern and respect for those with whom she/he is working. \_\_\_\_\_
- 44. Uses effective communication skills (e.g. listening, paraphrasing, active listening, itemized response, etc.) \_\_\_\_\_

SELF AWARENESS

- 45. Is aware of his/her own feelings, needs, biases, thought patterns, and expresses them appropriately. \_\_\_\_\_
- 46. Is aware of her/his own strengths and weaknesses; uses and manages them appropriately. \_\_\_\_\_
- 47. Is aware of his/her defensive patterns and manages them appropriately. \_\_\_\_\_

- 48. Demonstrates congruence of words, intentions and behavior. \_\_\_\_\_
- 49. Places appropriate emphases on hearing other people's feedback vs. her/his own internal feedback. \_\_\_\_\_

PRESENTATION SKILLS

- 50. Makes appropriate use of voice (e.g. volume, tone, pitch, pacing, etc.) \_\_\_\_\_
- 51. Makes effective use of gestures to add interest and emphasis. \_\_\_\_\_
- 52. Adopts appropriate posture/stance for the setting (e.g., relaxed/rigid, open/closed, drawing in/distancing, etc.) \_\_\_\_\_
- 53. Has a sense of "contact" with the group. \_\_\_\_\_
- 54. Has a grasp of the material being presented. \_\_\_\_\_
- 55. Fit with the training goals. \_\_\_\_\_
- 56. Seems prepared, organized. \_\_\_\_\_

SPECIALIZED AREAS OF COMPETENCE

- 57. Clarity regarding what special areas of competence he/she brings to the ministry of congregational development. \_\_\_\_\_
- 58. Competence level in the following areas:
  - a. Highly conflicted situations \_\_\_\_\_
  - b. Evangelization and growth \_\_\_\_\_
  - c. Financial stewardship \_\_\_\_\_
  - d. Search process \_\_\_\_\_
  - e. Diocesan systems for congregational development \_\_\_\_\_
  - f. Long term and complex congregational development \_\_\_\_\_
  - g. Congregational development in declining congregations \_\_\_\_\_
  - h. Starting new congregations \_\_\_\_\_
  - I. Working with clusters or area ministries \_\_\_\_\_
  - j. Congregations dealing with major trauma, grief or scandal \_\_\_\_\_
  - k. Education and formation methods and programs and their relationship to the congregation's development \_\_\_\_\_
  - l. Congregational self-definition and marketing \_\_\_\_\_
  - m. Communal discernment methods \_\_\_\_\_
  - n. Other: \_\_\_\_\_

### LEADERSHIP OF CONGREGATIONAL DEVELOPMENT

This section applies to those serving in some leadership role in the congregation or on the diocesan staff in relationship to the development of congregations.

- 59. Has a leadership style that is flexible enough to fit the congregation's culture and place in its organizational life cycle. \_\_\_\_\_
- 60. Demonstrates ability to clearly set and navigate in a direction. \_\_\_\_\_
- 61. Demonstrates ability to "stay in touch" with the congregation's other leaders and active members (to hear, respect and appropriately respond to their ideas, feelings, values and concerns). \_\_\_\_\_
- 62. Has a leadership style that empowers others; increases the capacity of individuals and teams for self-management. \_\_\_\_\_
- 63. Attends to his/her own spiritual life. \_\_\_\_\_
- 64. Is effective at strategic management (i.e., helping the congregation to give adequate attention to developmental issues, new opportunities, relationship building, spiritual deepening, crisis prevention, while it also deals with its routine life and business.) \_\_\_\_\_
- 65. Is effective at leading in the implementation of plans. \_\_\_\_\_

### CONSULTATION SKILLS

- 66. Develops a clear agreement with clients (based on the client's expectations and hopes and the consultant's willingness and ability to respond). \_\_\_\_\_
- 64. Makes clear and appropriate financial arrangements. \_\_\_\_\_
- 65. Maintains an effective working relationship with the congregation's leaders. \_\_\_\_\_
- 66. Helps the client accept responsibility for the developmental work (not accepting responsibility for the client's problems, goals, etc. Not over-functioning or creating unhealthy dependency) \_\_\_\_\_
- 67. Makes effective use of the client's strengths and opportunities. \_\_\_\_\_
- 68. Has ability to acknowledge his/her own limits; to say "I don't know," "I'm confused." \_\_\_\_\_
- 69. Makes effective use of his/her own strengths in the consultation process. \_\_\_\_\_
- 70. Comes across as "authentic" (there is an integration of the person in the consultant role) \_\_\_\_\_
- 71. Helps clarify the issues in the congregation in initial meetings. \_\_\_\_\_
- 72. Helps the congregation to identify its primary strategic issues (i.e., long-term, systemic, capacity building, etc.) \_\_\_\_\_
- 73. Helps the congregation decide on specific action steps to solve problems and act on strategic goals. \_\_\_\_\_
- 74. Helps the congregation establish effective methods to monitor and take initiative in the developmental task. \_\_\_\_\_
- 75. Helps the congregation plan for effective follow-up. \_\_\_\_\_



- 76. Leaves the congregation with more competence, better able to solve its problems and use its own resources. \_\_\_\_\_
- 77. Changes the working relationship in a collaborative manner. \_\_\_\_\_
- 78. Disengages from the relationship in a mutually agreed-upon reduction of involvement. \_\_\_\_\_

AS A LEADER/CONSULTANT (circle one)

He/she met the congregation's expectations in congregational development.

Failed to Meet Expectations		Adequately Met Expectations		Far Exceeded Expectations	
1	2	3	4	5	6

Major strengths were:

Areas that need continued professional development are:

## Self -Assessment – person being assessed summarizes

In each competency area summarize your strengths and areas that need professional development.

	<u>Strengths</u>	<u>Need Development</u>
Congregational and Organization Development		
Theology and Spirituality		
Leader/Consultant Style		
Ethics		
System & Organizational Theory and Intervention		
Intervention Theory and Practice		
Group Development & Team Facilitation Skills		
Interpersonal Awareness and Skill		
Self Awareness		
Presentation Skills		
Specialized Areas of Competence		
Leadership of Congregational Development		
Consultation Skills		

## ASSESSMENT OF PARISH LIFE AND MINISTRY

### The Christian Life Model

1. Overall satisfaction with Parish Life and Ministry

<b>I am very dissatisfied</b>	1	2	3	4	5	6	<b>I am very satisfied</b>
-------------------------------	---	---	---	---	---	---	----------------------------

2. *Worship* - How well we worship as a community. Equipping people for participation in the Eucharist and the use of the Daily Office and personal devotions. Climate: issues of style, beauty, flow; appropriate use of the Holy Eucharist and Daily Office; teaching and coaching the congregation for prayer life and participation in liturgy; functioning of guilds and individuals that play special roles; schedule; participation, etc.

a. *Overall satisfaction*

<b>I am very dissatisfied</b>	1	2	3	4	5	6	<b>I am very satisfied</b>
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

3. *Doctrine* - The parish's awareness of what has authority in the Christian Life. Competence as a congregation and individuals in relating those sources of authority to decision-making

a. *Overall satisfaction*

<b>I am very dissatisfied</b>	1	2	3	4	5	6	<b>I am very satisfied</b>
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

4. *Action* - Corporate action of service, evangelization, stewardship; lay members' awareness of their apostolate in the workplace, family, civic life, church. Parish's dealing with the tension between the parish's corporate ministries and the individual's apostolate in daily life.

a. *Overall satisfaction*

<b>I am very dissatisfied</b>	1	2	3	4	5	6	<b>I am very satisfied</b>
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

5. *Oversight* - Competence and commitment of leaders , clergy and lay, for leadership and management; building community; and deepening the congregation's spiritual life; leaders serving, guiding, leading and managing the parish into an appropriate and full living of the Christian Life: bringing and preserving a proper order/shape in the parish's life; methods for reflecting, discerning and planning in parish life; lay-clergy relationships; sense of direction, etc.

a. *Overall satisfaction*

<b>I am very dissatisfied</b>	1	2	3	4	5	6	<b>I am very satisfied</b>
-------------------------------	---	---	---	---	---	---	----------------------------

b. *Weaknesses*

c. *Strengths*

6. *Other Comments*

## CLERGY ASSESSMENT

### A. Steps

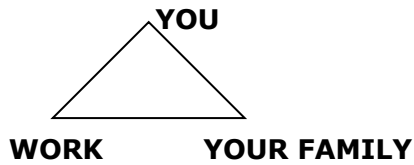
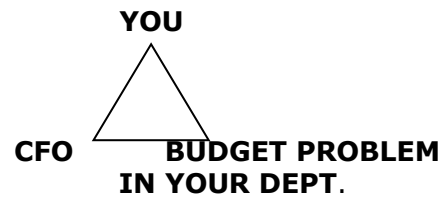
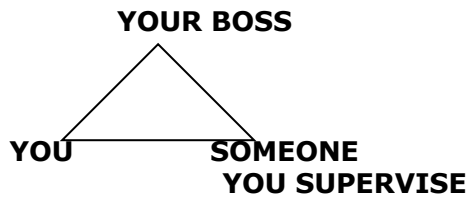
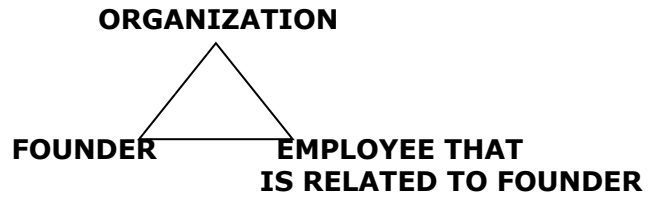
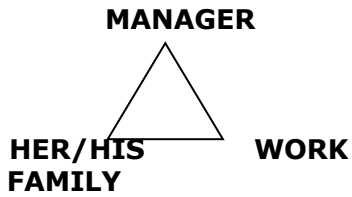
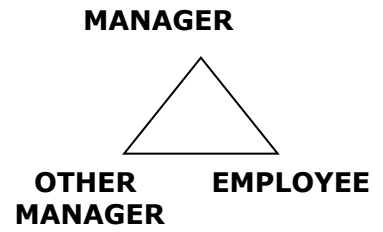
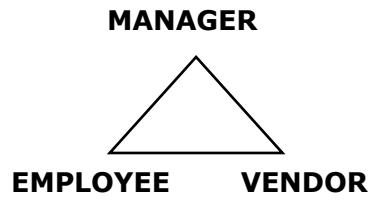
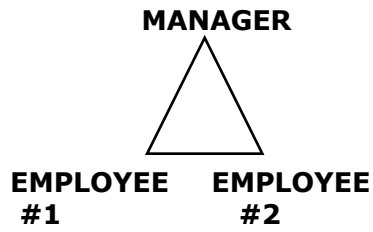
1. For use after an overall parish assessment based on the same model.
2. Members of vestry complete assessment form. Priest fills out form for self-assessment.
3. All forms are returned to the Rector or Vicar for review and reflection. (If desired by the priest, this could be done with the Wardens.)
4. Rector or Vicar makes a brief response to the Vestry, i.e., "You seem pleased with. . ."; "Some concern was expressed about. . ."; "I see myself giving special attention to. . ."

### B. Please write comments in each of the following areas

	Like about your ministry in this parish	Concerns I have	Things I wish you would consider doing differently
<b>Worship</b>			
<b>Doctrine</b>			
<b>Action</b>			
<b>Oversight</b>			

### C. Other Comments

# COMMON TRIANGLES



ADD TWO THAT ARE COMMON IN YOUR LIFE --

## CASES

As an individual or as a team --

1. Diagram the pattern of emotional triangles/triangulation in each case; include your hunches about possible interlocking triangles.
2. Identify ways to de-triangulate the situation; what might the various parties do?

### **CASE #1**

The organization is in a high crime area. Part of your work is to run a women's shelter for victims of domestic abuse. The team has been working on ways of making the organization's space more secure. Staff members are concerned about strangers and abusers getting into the property. It doesn't happen much but it has happen twice in the last year.

The team is unclear about its authority to make decisions and act on them. It has been meeting for three months. The Executive Director recently asked a former police officer that she has developed a romantic relationship with to help the team. He is an expert on building security and is willing to consult with the team without charging the agency. He has met with the team twice and is now coming to the next meeting with two pages of specific recommendations. Some team members are angry. They feel like their work and authority has been undercut.

### **CASE #2**

Mary has an issue with Jane, her supervisor. She sees Jane as overbearing and intrusive in how she supervises. Mary feels that Jane doesn't trust her. Mary's sense of job satisfaction is very low. She is constantly rehearsing a scene in her mind in which she tells Jane off and quits. She has gone to Lorraine, an old friend, who also works in the organization, to complain about how she is being treated and to ask her to intervene with Jane or a top manager.

### **CASE #3**

William is afraid that he is going to end up looking foolish and incompetent to his peers and top management. He is under pressure from his supervisor to produce quick results on a piece of work related to a new product that the COO has a big stake in. The COO is convinced that the product will dramatically reposition the company in relationship to the competition. For the past ten years he has felt that the company is second rate in terms of its products. He doesn't enjoy going to trade shows anymore. William thinks that to do a good job more time is needed for testing and work with consumer focus groups.

### **CASE #4**

The company makes metal products on contract with large manufacturing organizations. The owner, Scott, is the son of the founder. His father died 8 years ago of a heart attack (on the shop floor). He had not been planning to take over the company but after his father died he felt obligated to step in. His mother and other brother have made him very aware of how relieved they are that he is in charge. They were very concerned about turning control over to outside managers and felt that to sell the company would be a betrayal of the founder's memory.

The company has recently won two quality awards from its industry association. The owner's picture was on the cover of the association's last magazine. There was a four-page article on how the company is making a turn around. Scott is up for election as the national president of the association. He has been doing a lot of travel speaking to industry related groups about the company. He is "getting a kick" out of all the travel and attention.

Older employees are feeling very frustrated. There is a lot of grumbling in the lunchroom about "too much change", "this isn't the way his father would have done things", "he hasn't been in the shop for five months". Those hired in the last three years are proud of Scott and the company. There have been several loud arguments with the "old timers" -- "if you don't get on board this company is going to go under", "I don't think that Scott will put up with this stuff from you for much longer".



### **CASE #5**

June started this small non profit organization 12 years ago to produce affordable housing for low-income people in the city. It has been a large part of her identity; she puts in long hours and gains a great deal of satisfaction from her work. Two years into the work she fell in love with and married Tom, the organization's consultant on house financing. Tom became part of the staff and was given the title of co-director. In practice he has had significant influence in shaping the construction end of the organization but very little over strategic direction, new initiatives in housing management contracts and joint partnerships with for-profit developers. Recently he has gotten interested in the relationship between overall community development and affordable housing. He also went to a training program on how housing organizations can offer new home owners skill training in house care, e.g., electrical, heating, etc. He has not been able to get June to put these possibilities on the board's agenda. June is beginning to get angry about being pushed.

### **PART 2 of CASE #5**

June has agreed to get Tom more involved in overall strategy for the organization. She has asked him to work on a team dealing with a project involving a for-profit developer. Tom is very unhappy with the team's decision about how to negotiate the contract with the developer. He has gone to June asking her "to back him up on this". June doesn't like the way he is approaching this issue. She is also very aware that there are two women on the team that Tom is close with. She is afraid that he might get involved with one of them. Their relationship has been getting more and more strained in the past four months. Her former husband had cheated on her, so the fear that it might happen again overwhelms her at times. She has raised the fear with Tom on several occasions, he has said "don't worry it isn't going to happen". She is worried.

## THREE INTERVIEW PROCESS

Interviews are not only a data gathering process but are also system interventions. They are not neutral, they affect the people being interviewed and those doing the interviewing. This process is designed to be used as a means to help participants explore both the interviewing process and the issues raised in the interviews.

The same basic tool may be used as a congregational development intervention, in an expanded process, involving a significant portion of a congregation's members. Such a process might open up issues regarding a congregation's living of the renewal-apostolate cycle -- helping a community both come to appreciate what is done well and to improve.

### The Process for Use in a Learning Setting

1. Please interview three members of the congregation -- two who are regular and frequent participants in the Eucharist and one who is regular but not frequent. Your task is to listen deeply, with an appreciative ear, and record their responses to the questions. Please do not allow yourself to take on a teaching or explaining role in relation to the issues that emerge. If that seems called for ask if the person would like to do that in a second session. If a person is confused by a question or doesn't like the question, move on. While you want to complete the interview in a timely manner, you may also want to enter into the process with follow up questions. Please avoid any judgment on what the person is sharing.
2. You will need to make copies of this form so you can use them to make rough notes during the interviews.
3. Bring your notes to the program.
4. A good preparation for interviewing is to have someone else interview you asking the same questions or to fill out the sheet on yourself.

## **Interview Questions**

Interview #1	
Interview #2	
Interview #3	

---

1. What are the major sources of pressures, demands and expectations in your life? How do you see them as helpful or stressful, etc?

2. How do you work at "balancing" these expectations, demands and pressures?

3. How do you renew yourself emotionally and physically?

4. How do you renew yourself spiritually?

5. How does your practice of Christian faith and/or the congregation's life help or hinder each of the areas noted above?

a. Expectations/demands/pressures

b. Emotional/physical renewal

c. Spiritual renewal

5. How does your practice of Christian faith and/or the congregation's life relate to your work, family and civic life?

# Four Key Systems: Analysis

What is your understanding of the primary task of the organization?

Please rate your satisfaction with the following areas of the organization's life:

	Very Low					Very High
<b>A. OVERALL SATISFACTION</b>						
1. My overall satisfaction with the organization's functioning.	1	2	3	4	5	6
2. My overall satisfaction with my role in the organization.	1	2	3	4	5	6
<b>B. TECHNICAL SYSTEM</b>						
1. Innovation in our organization - a policy and practice of encouraging people to find better ways to do their jobs	1	2	3	4	5	6
2. Level of agreement among us as to what our primary task is.	1	2	3	4	5	6
3. Productivity in our primary task.	1	2	3	4	5	6
4. Quality of our work.						
<b>C. ADMINISTRATIVE SYSTEM</b>						
1. Planning that results in concrete decisions and actions.	1	2	3	4	5	6
2. Information flow <u>within</u> the organization that is accurate, timely and relevant to decision making.	1	2	3	4	5	6

	<b>Very Low</b>					<b>Very High</b>
<b>D. SOCIAL SYSTEM</b>						
1. Our system for identifying and developing future leaders - public, understood by people, effective.	1	2	3	4	5	6
2. The quality of work life (QWL) for staff (rewards, opportunity for growth and increased responsibility, climate of respect and encouragement, compatible values, etc).	1	2	3	4	5	6
a. Overall	1	2	3	4	5	6
b. CEO/Ex. Director	1	2	3	4	5	6
c. _____	1	2	3	4	5	6
d. _____	1	2	3	4	5	6
3. QWL for the board	1	2	3	4	5	6

## E. STRATEGIC SYSTEM

1. Evaluation system - a regular and systemic review of the functioning of the entire organization.	1	2	3	4	5	6
2. Environmental assessment - regular assessment of the external forces impacting the organization.	1	2	3	4	5	6
3. Our organization's capacity to set a direction and navigate in that direction.	1	2	3	4	5	6
4. Organization's mix of skills -- allows us to relate to changing conditions that effect our ability to carry out our primary task (skills such as problem solving, team facilitation and participation, etc).	1	2	3	4	5	6

Based on Karl Albrecht's *Four Key Systems* model

Robert A. Gallagher, 1990

# ORGANIZATIONAL DIAGNOSIS WORKSHEET

Based on *Organizational Diagnosis: Six Primary Elements of the System*

© Robert Gallagher, 1973, 1996

Are you (circle one)

- Clergy
- On the Vestry
- A member

Please rate the following items. Add comments if you want

	<b>Very Low</b>					<b>Very High</b>
<b>A. Overall</b>						
1. My overall satisfaction with the parish's functioning	1	2	3	4	5	6
2. My overall satisfaction with my own role in the parish	1	2	3	4	5	6
<b>B. Primary Task</b>						
1. Level of agreement <b>among members</b> about the primary task of the organization	1	2	3	4	5	6
2. Level of agreement <b>among vestry members</b> about the primary task of the organization	1	2	3	4	5	6
3. Level of agreement <b>between the vestry and the rector</b> about the primary task of the organization	1	2	3	4	5	6
4. Productivity in our primary task	1	2	3	4	5	6
5. Quality of service	1	2	3	4	5	6
6. Innovation - practice of encouraging people to find better ways to minister and do their jobs	1	2	3	4	5	6
<b>C. Vision</b>						
1. Sense of direction for the organization (expressed in practice, vision, or strategic plan)	1	2	3	4	5	6
2. Clarity of core values	1	2	3	4	5	6
3. "Ownership" of direction – rector	1	2	3	4	5	6
4. "Ownership" of direction among vestry members	1	2	3	4	5	6

D. Dynamics	Very Low					Very High
1. Level of trust among vestry members	1	2	3	4	5	6
2. Level of trust between rector and the staff	1	2	3	4	5	6
3. Level of trust among <b>members</b>	1	2	3	4	5	6
4. Level of <b>trust between vestry and the rector</b>	1	2	3	4	5	6
5. How well the parish manages the dynamics of change and stability (e.g., changing when we need to change, maintaining institutional integrity and integration as we change, skill at removing or reducing the forces against needed change, skill at maintaining adequate stability so productivity is maintained, etc.)	1	2	3	4	5	6
E. People	Very Low					Very High
1. Competence of <b>rector</b> for his/her work	1	2	3	4	5	6
2. Commitment of <b>rector</b> to his/her work	1	2	3	4	5	6
3. Competence of the <b>vestry</b> for its work	1	2	3	4	5	6
4. Commitment of the <b>vestry</b> for its work	1	2	3	4	5	6
5. How effectively the <b>parish</b> makes use of different working styles among its members	1	2	3	4	5	6
5. How effectively the <b>vestry</b> makes use of different working styles among its members	1	2	3	4	5	6
F. Structures and Processes	Very Low					Very High
1. How adequate and appropriate are the resources the <b>rector</b> has for his/her work (e.g., technology, space, etc.)	1	2	3	4	5	6
2. How adequate and appropriate are the resources the <b>vestry</b> has for its work	1	2	3	4	5	6
3. Effective participation in information flow, problem solving and decision making on the part of the <b>rector</b>	1	2	3	4	5	6



4. Effective participation in information flow, problem solving and decision making on the part of the <b>vestry</b>	1	2	3	4	5	6
5. How well the <b>rector</b> deals with differences, disagreements, conflict	1	2	3	4	5	6
6. How well the <b>vestry</b> deals with differences, disagreements, conflict	1	2	3	4	5	6
7. The <b>rector</b> usually has the accurate and timely information needed for decision making	1	2	3	4	5	6
8. The <b>vestry</b> usually has the accurate and timely information needed for decision making	1	2	3	4	5	6
9. The <b>rector</b> usually makes decisions from a sense of free choice rather than habit or pressure	1	2	3	4	5	6
10. The <b>vestry</b> usually makes decisions from a sense of free choice rather than habit or pressure	1	2	3	4	5	6
11. The <b>rector</b> has a strong sense of internal commitment to rector/vestry decisions	1	2	3	4	5	6
12. The <b>vestry</b> has a strong sense of internal commitment to its decisions	1	2	3	4	5	6
13. Adequate links and cooperation among <b>members</b>	1	2	3	4	5	6
14. Adequate links and cooperation among <b>vestry</b> members	1	2	3	4	5	6
15. Adequate links and cooperation <b>between the rector and members</b>	1	2	3	4	5	6
16. Adequate links <b>between rector and vestry</b>	1	2	3	4	5	6
17. Adequate links and cooperation <b>between the rector/vestry and members</b>	1	2	3	4	5	6

G. Leadership

	Very Low					Very High
1. The <b>rector</b> is able to get the routine work done while also paying attention to strategic issues (e.g., long term or systemic issues, capacity building)	1	2	3	4	5	6
2. The <b>vestry</b> is able to get the routine work done while also paying attention to strategic issues (e.g., long term or systemic issues, capacity building)	1	2	3	4	5	6

3. The <b>rector</b> is in adequate touch with what is happening in the whole system	1	2	3	4	5	6
4. As a <b>vestry</b> we are in adequate touch with what is happening in the whole system	1	2	3	4	5	6
5. As rector I am able to effectively participate in setting the strategic direction for organization	1	2	3	4	5	6
6. As a <b>vestry</b> we are able to effectively participate in setting the strategic direction for organization	1	2	3	4	5	6

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### LIKES-CONCERNS-WISHES: ASSESSMENT WORKSHEET

#### 1. What is your overall satisfaction with the life and work of the parish?

VERY LOW SATISFACTION					VERY HIGH SATISFACTION
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>

#### 2. Offer your thoughts about the parish's functioning using the categories below.

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

## Assessing Organizational Culture

Assess your organizational culture according to these possible expressions. This focuses more on climate and may open up an exploration of the related values, behaviors and underlying assumptions.

Sense of community					Sense of being on my own
Passive					Active
Open					Closed
Warm					Cold
Dependent					Interdependent
Erratic, shallow interests					Deeper, stronger interests
Flexible, adaptive					Narrow response range
Oddness, uniqueness					Conformity
Demanding work					Easy work

Easy pace					Driven
Open to examining the organizational culture					Closed to examining the organizational culture
Suspicious					Trusting
Responsive					Unresponsive
Authoritarian					Democratic
Vision focus					Details focus
Competitive					Cooperative
Not competent - therefore needs tight supervision or work that doesn't matter					Competent - individuals or teams

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# Parish Evangelization Assessment

**1. Invite** - Parish awareness that the Holy Spirit is already inviting people. Awareness that to invite people into a deep & lasting relationship with Christ and his Church is an act of love. Special attention to inviting the "unchurched". A style that respects the dignity of people. Church's physical presence invites. Parish is bound up with the concerns of the neighborhood/community in prayer & action. Individual members invite friends, relatives, neighbors, etc.

**Not Satisfied**

**1**

**2**

**3**

**4**

**5**

**6**

**Very Satisfied**

Comments:

**2. Greet** - Parish climate of hospitality. Visitors are identified and appropriately welcomed. Visitors are followed up on quickly, etc.

**Not Satisfied**

**1**

**2**

**3**

**4**

**5**

**6**

**Very Satisfied**

Comments:

**3. Orient** - Parish ability to orient people for a fuller relationship with Christ and his Church. A method to orient people to the parish, the Episcopal Church and Anglican Communion; to Anglican spirituality. A newcomer class. A parish handbook with information on parish guilds and organizations, educational & spiritual formation opportunities, sacramental standards, etc.

**Not Satisfied**

**1**

**2**

**3**

**4**

**5**

**6**

**Very Satisfied**

Comments:

**4. Incorporate** - Parish ability to help a person go more deeply into the Christian life; enabling and supporting living the baptismal covenant; letting people find their place in the Christian life and the parish's life according to the gifts God has given them, etc. Availability of a foundation course for adults on Christen faith & practice as lived in the Episcopal Church. Assistance in forming a rule of life; in developing increasingly mature habits for Christian living, etc.

**Not Satisfied**

**Very Satisfied**

**1            2            3            4            5            6**

Comments:

**5. Send** - Parish awareness that we are representatives of Christ and his Church wherever we may be. Awareness that most people's ministry is in their family, community and work and as =citizens, etc.

**Not Satisfied**

**Very Satisfied**

**1            2            3            4            5            6**

Comments:

*From Incorporation of New Members in the Episcopal Church: A Manual for Clergy and Lay Leaders by Alice Mann, Ascension Press*

# Evangelization & Growth Assessment

**Instructions:** Give a copy of the assessment to each participant. Each person fills it out and turns it in. A facilitator can either put the totals on newsprint or on a summary sheet and have copies made. Those who have completed the assessment are given an opportunity to see and discuss the results.

	Very Dissatisfied			Very Satisfied		
	1	2	3	4	5	6
1. My overall satisfaction with the congregation's functioning						
2. My overall satisfaction with my role and life in the congregation						
3. Worship (community worship and equipping for personal prayer life)						
4. Learning how to integrate the Scriptures, historic & present wisdom of the church, the knowledge of the larger human experience in shaping my life						
5. Congregation's nurturing & equipping of members for faithful action with family, friends, in civic life and in our daily work						
6. Congregation's evangelization						
7. Congregation's stewardship						
8. Congregation's service to others						
9. Training leaders with the knowledge and skills for congregational development; including evangelization and growth						
10. The ability of leadership groups to give attention to long term issues building the overall strength of the congregation (versus a tendency to get caught up in crisis, last minute management or trivial matters)						
11. <u>Inviting People</u> - Equipping people for and encouraging them to invite friends and family. Making the exterior of our buildings and grounds something that draws people. Advertise.						

12. Greeting Visitors - Develop a way to greet visitors. Have a norm that the visitor at coffee hour is never abandoned; is engaged in conversation and asked to give their name and address; has a follow-up contact that week.

13. Orienting - From the first Sunday a person visits into their third month people are oriented into the way this particular community lives.

14. Incorporating - Incorporation has taken place when the person can affirm that this is their faith community; and has established a somewhat stable pattern (for now) with regard to their own baptismal renewal and their Christian living in family, work-place and civic life. We fully incorporate most new people successfully.

15. How quickly we notice when someone is drifting away from the congregation

16. How quickly we reach out to people who are drifting away (within six weeks).

17. Our success in reaching people who are uncertain, tentative or cynical about faith or the Church

18. Our success in reaching people in this area who are significantly different from current members (e.g. in education, income, language, race, etc.).




## IMPLEMENTATION WORKSHEET

Explore these implementation issues.

1. How will you show leadership for the project (e.g., Keeping it in front of people. Showing your own commitment)
2. How will you monitor the project (meetings to review process, someone responsible for coordination, etc.)
3. Who needs to be communicated with?
4. Do you need authorization for any part of the project?
5. What type of cooperation do you need from other groups and individuals?
6. What resources do you need?
7. What resistance can be expected? What form is it likely to take?
8. How are you likely to undermine yourself (block, sabotage, etc.)?

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## Political Analysis and Action Plan

- 1. Draw a “social map” of people and groups in the organization that are likely to influence the outcome of your project. Put the project in the center of the page and put people and groups in relationship to each other and to the project.**

**2. Who are the people (or groups) that must be “on board” if the project is to be successful? Note your thoughts on the chart.**

Person or Group	Likely level of Receptivity 1 = low 4 = high	Attraction	Resistance

**3. Do an analysis of the competence of people or groups in relation to the project**

Person or Group	Competence Needed	Existing Level of Competence

## Action Plan

**A. Three key steps to take**

**B. To do within the next three weeks**

**C. Other thoughts?**



# The Order of the Ascension

The **ORDER OF THE ASCENSION** founded in 1983 has helped ground and center its members in their daily life and their roles as parish leaders and developers.

## The Promise

Members take a **three-year promise** "to seek the presence of Jesus Christ in the people, things and circumstances of life through stability, obedience and conversion of life." The cross of the Order is given at this time.

## Shared Commitments

- ◆ The **revitalization of parishes**, especially those that are poor, working class, urban, isolated, serving oppressed or marginalized peoples, with a history of instability and/or longing for renewal; and
- ◆ **The struggle for compassion and justice in our society**

## Common Life

- ◆ A **five day gathering** each year for spiritual retreat, reflection on our role as leaders, social time and business. Held in the week after Ascension Day. The weight given to the elements may vary from year to year.
- ◆ Each member takes **responsibility for their own spiritual life** in a manner that fits their situation, reflects the Promise and our common commitments, and includes listening for the wisdom of God and others in the creation and in the longing of their hearts.
- ◆ A Benedictine spirituality grounds the Order's life

## Membership

- ◆ Membership is open to laity, bishops, priests and deacons; to baptized people of any Christian communion.
- ◆ All members must receive a significant amount of training in congregational development. New members are expected to complete the Church Development Institute (or a comparable program) within three years of beginning the membership process. People interested in membership are requested to complete at least five days of a CDI before formally submitting their application.

The Order is a dispersed Christian community related to the Episcopal Church.

## Finances

Finances are handled by:

- Members paying their own costs for the yearly common life event, i.e., room, meals, cost of materials or outside retreat conductor, educator, etc.;
- A travel pool in which all participate resulting in everyone paying the same travel cost; and
- A yearly pledge toward any administrative costs.

## Ascension Press

Ascension Press is a ministry of the Order of the Ascension, producing tools for congregational development and oversight consistent with the mission and general orientation of the Order.

## For more information:

[www.orderoftheascension.org](http://www.orderoftheascension.org)

# TYPE AND ORGANIZATION DEVELOPMENT

There are several ways of using Type theory to better understand organizational dynamics and to use that knowledge as the basis for organizational leadership and improvement. For example:

- **Team Profiles** – Organizations commonly use teams as a structure for accomplishing work. Type theory is a resource in understanding the likely strengths, blindsides, potential tensions and other dynamics of teams. It may assist in making the best use of individual member's strengths.
- **Organizational Profiles** – Organizations frequently have a dominant typology. Understanding the organization's "type" may be a useful resource in processes of organizational self-definition and marketing. As with teams, it may help leaders better understand organizational dynamics.
- **Leadership in Organizations** – Type theory may be used to understand a variety of leadership styles. It may be used as the basis in a program of leadership development.
- **Decision Making in Organizations** – One way of improving organizational, team and individual decision making is to explore how type preferences shape our strengths and blindsides in processes of envisioning, decision making, communication, planning, conflict management, and problem solving.
- **Staff or Member Development** – Type provides a tool in "people development". It may be used in career counseling, management of life stages, and coping with stress.
- **Change Management** -- All organizations face the need for change as they deal with constantly changing environmental forces and shifts in the expectations and hopes of employees or members. Type theory is a resource in helping people operate more effectively in the context of change.

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## DEVELOPMENT & GROWTH

Ways to Develop & Grow as a Community and as an Organization:

1. **Take the diversity of gifts seriously.** Organizations and communities will have certain strengths and weaknesses. They will see some things and be blind to others. No community/organization/individual will have it all. Know your strengths; accept your blindspots and weaknesses.
2. **Use your strengths;** appreciate, build on, expand the use of, increase related skills and knowledge. Be really good at what you are. Offer services, products and a life that work with your organizational culture and character.
3. **Avoid** going in places that call for the use of your weaknesses. Let an organization that has the needed strengths go in those places.
4. **Compensate** for your weaknesses and blindspots. Bring in resource people, partners, and consultants that can offset your organizational weaknesses. Develop the habit of working with you weaknesses in decision making processes, e.g., if yours is a very intuitive-thinking organization, start your decision making on an important issue by working with sensing and feeling information.
5. **Develop new strengths.** Intentionally develop the organization's weak-side enough so it isn't always catching you off guard. For example, add employees that bring new strengths while having the flexibility to adapt to the organization's primary culture or keep working in your decision making processes in a way that calls for the disciplined use of all Type functions; in time it will emerge as a new strength.
6. Learn to find and use the strengths needed that fit where the organization is in its life cycle and in relationship to any particular opportunity or problem the system is facing at the moment.

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# Use of Type in Organizations

A central question is what does the organization want in using Type as a resource? How do you want to make use of Type to improve performance, job satisfaction, productivity, effective decision-making, etc.?

Some options:

1. Increased self understanding
2. Increased appreciation for the styles of others. A sense of how to work with others.
3. Improved team work -- including more effective decision making; ability to diagnose a team's likely strengths, blindsides, dynamics, areas of tension, etc.; increased ability of leaders to play an effective role in the team
4. Improved understanding by employees of organizational character as applied to how they might work best in this particular organization. The objective here is to help people get a sense of perspective about how/why the organization functions as it does; how strengths and blindsides are interdependent, etc. Possibly to identify ways they can be more effective and satisfied as employees.

To achieve all the above to a significant extent organization needs to:

1. Offer a solid introduction to Type in organizations. This provides the base for everything else. What you need to look for is:
  - Helping a significant percentage of the participants to "get" the basics and have a satisfying experience (My guess is this is usually about 12/ - 2/3 of most groups. Some people don't like any process of insight and self-exploration. For others it is simply new and will need reinforcement to be a working resource.)
  - Identifying participants who have a difficult time reflecting on their own behavior and/or actively taking responsibility for improving their interpersonal and team skills
2. Active and timely intervention by managers and team leaders to reinforce appropriate use of Type theory in the workplace. Including correcting misuse such as using Type to negatively label others.
3. Managers and team leaders making regular use of Type as a team building tool. Do this in at least three ways:
  - Every time a new member is added to a team (and has been through an orientation on Type), explore the new profiles of the team, how does the new person impact strengths, blindsides, dynamics, etc; manager and new person spend about 20 minutes looking at each of their Types (how can we best work together?)
  - When the team is engaging a new task, experiencing tension, getting stuck, etc. use Type to explore what is happening
  - Have the team make disciplined use of different Type preferences in decision making and problem solving processes

Note: the above may require additional training for managers; active encouragement and coaching, and possibly on-site assistance by a facilitator or consultant.

Robert A. Gallagher 3/16/01



## Type -- Learning Styles

ST's are interested in: facts- useful, practical info about everyday activities  
Learns best by: doing, hands-on Needs: precise, step-by-step instructions;  
logical, practical reasons for doing something Wants from teachers: to be  
treated fairly

SF's are interested in: useful, practical info about people Learns best by:  
doing, hands on activities with others Needs: precise, step-by-step  
instructions; frequent, friendly interaction and approval Want from teacher:  
support, individual recognition

NF's interested in: new ideas about how to understand people, symbolic and  
metaphorical activities Learn best by: imaging creating with others, writing  
Needs: general direction, freedom, frequent positive feedback Want from  
teacher: warmth, enthusiasm, humor, individual recognition

NT's interested in: theories and global explanations Learn best by:  
categorizing, analyzing, applying logic Need: an intellectual challenge - and  
then to be allowed to work it out Want from teacher: to be treated with  
respect, to respect the teacher's competence

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

<p><b>Extraverted organizations</b></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><b>Introverted Organizations</b></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><b>Sensing organizations</b></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><b>Intuitive Organizations</b></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><b>Thinking organizations</b></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><b>Feeling Organizations</b></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><b>Perceiving Organizations</b></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><b>Judging Organizations</b></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>

## Team Profile: Sixteen Type Preferences

1. Place members of your team in one of the preference areas.
2. Discuss – what strikes you about the result?

<u>I</u> STJ	IS <u>F</u> J	IN <u>F</u> J	IN <u>T</u> J
IS <u>T</u> P	IS <u>E</u> P	IN <u>E</u> P	IN <u>T</u> P
ES <u>T</u> P	ES <u>F</u> P	EN <u>F</u> P	EN <u>T</u> P
ES <u>T</u> J	ES <u>F</u> J	EN <u>F</u> J	EN <u>T</u> J

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

## Quadrants Profile

1. Place members of your team in the quadrants.
2. Discuss – what are the likely team strengths, blindsides, areas of tension, other dynamics?
3. Identify a time when the team was struggling with “change”; how did some of these dynamics show themselves?
4. What does the team need to do to be most effective in dealing with change?

<p><b>IS</b>          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>IN</b>          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>ES</b>          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>EN</b>          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>

## Team Profile: Functions

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>
What steps are needed to get the job done? What will the cost be? What information is needed?	What will be the impact on people? What can be done to help people?	Who will be involved in the decision making? What are our core values in this work?	What new ways of approaching this are available? What are related theories and models?

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## Team Profile: Temperament

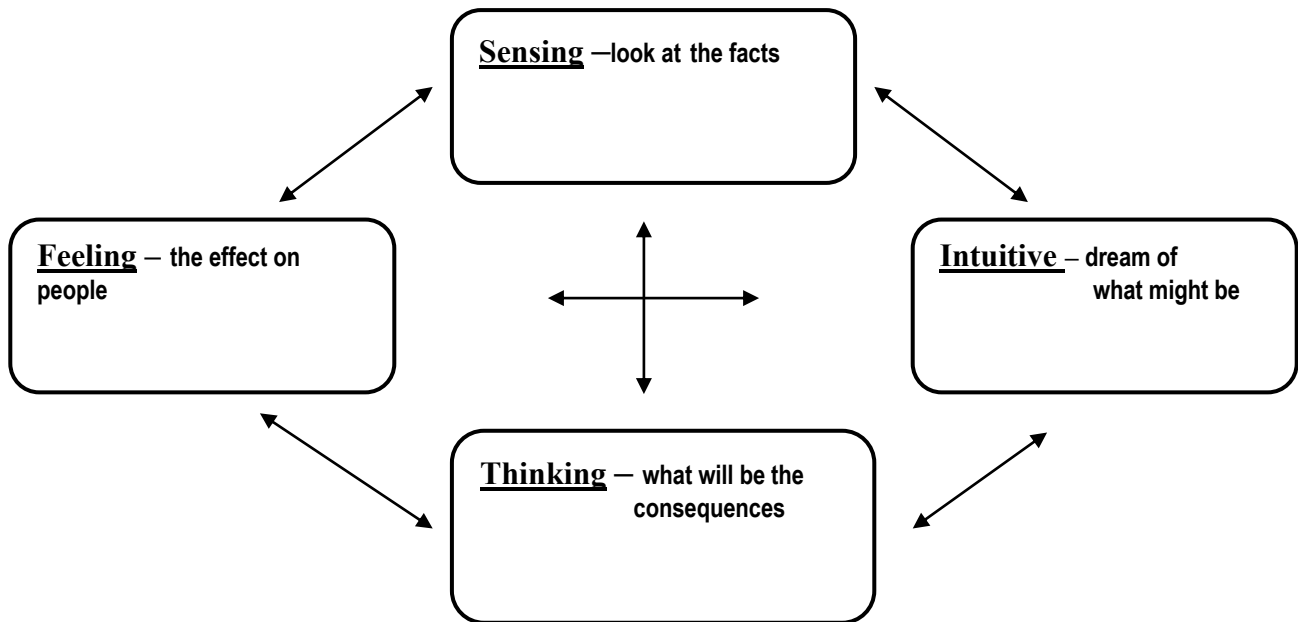
1. Place members of the team in the grid.
2. Explore leadership styles – what are the team’s strengths, weaknesses, possible areas of tension, other dynamics?
3. How might the team make best use of its leadership gifts? How to compensate for its blindside(s)?

<b>SJ</b>	<b>SJ</b>	<b>NF</b>	<b>NT</b>
<b>SP</b>	<b>SP</b>	<b>NF</b>	<b>NT</b>
<b>SP</b>	<b>SP</b>	<b>NF</b>	<b>NT</b>
<b>SJ</b>	<b>SJ</b>	<b>NF</b>	<b>NT</b>

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## Team Profile: Decision Making

1. Draw the shapes for each preference at the bottom of the page or on another sheet of paper – make each a size in relation to the others that reflects you view of its weight in the team’s decision making
2. Place team members in relationship to dominant function
3. How could the team accept and use the strengths it has while also paying attention to all functions in decision-making?



## MBTI: In the Grip

Name

MBTI Type

Dominant Function

Inferior Function

### **Triggers for Getting "In the Grip"**

### **Characteristics of Being "In the Grip"**

### **Ways to Return to Equilibrium**



## TYPE AND LEADERSHIP WORKSHEET

The objective of this worksheet is for participants to become more familiar with issues of Type and leadership as seen in their own behavior.

The worksheet might best be used over several sessions to gather information on your leadership style.

You might also enhance your learning by:

1. Doing research in texts on Type and leadership. As you discover information that applies to you, add it to the appropriate box.
2. As you reflect on or receive feedback on your behavior, you can add it to the worksheet.

	<b>As Participant</b> (Shared Leadership)	<b>As Team Leader</b>	<b>In Leadership of the Organization</b>
Positive Use of Strength			
Use of Strength in a Manner that Did Not Fit the Situation			
Positive Use of Non-Preferred Functions			

	<b>As Participant</b> (Shared Leadership)	<b>As Team Leader</b>	<b>In Leadership of the Organization</b>
<b>Appreciation</b> Or Use of Another's Type Strength			
Inferior Function Experiences			
Experiences Related to Type "Split"			

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# Inter-group Team Building Process

This process can be used when:

- Two groups want to improve their working relationship
- As a way of establishing clearer expectations between two parties
- As a team building process between two parties sorting out roles, needs, and hopes.
- As a tool in managing conflict in a low – middle range conflict

## The Process

### A. Advance Work

1. Arrange for an overall facilitator, possibly also a second facilitator. A third party is often needed for this process. The degree of tension between the parties is taken into account in determining whether the groups can self-manage the process, can use an external or internal facilitator, or need a professional consultant.
2. Those designing the meeting decide on the objectives of the total process and of the meeting(s). Decide on how each group is to be represented.
3. Arrange for any needed background material to be provided to participants.
4. Arrange for needed materials – three “pads” of newsprint for each group (to be hung side-by-side), magic markers (dark colors), masking tape.

### B. The Meeting

1. Introduce the objectives of the process and the meeting(s).
2. Provide an overview of the process
3. Each group goes to its own room or area.
4. Each group prepares lists on two (or possibly three) pads of newsprint
  - One list is about what the group’s desires (that might be expressed as – wants, expectations, hopes, etc.
  - A second list is an “empathy list.” This is the group’s hunches about what the other group wants, expects, or hopes for.
  - If there is a third list it would be around a theme that affirms the relationship between the two groups – What we value (affirm, like about) our working relationship.

The group needs to prioritize the first two lists.

5. The two groups come together and share the lists.
  - A presenter from each group shares that group’s work with a focus on the priority items.
  - The facilitator has the groups share in a matching sequence, i.e., group “A’s” list of its desires followed by group “B’s” empathy list. A brief exploration of similarities and differences takes place. Clarification of meaning work takes place.
6. The whole group might then develop a follow-up list. (What might easily be done together to improve the work? What needs exploration and/or research?) Or the session might end with step #5. The action at this point will depend on factors such as the capacity of the parties to work together, roles and responsibilities, the time available and the importance of the issues.

### C. Follow-up

Possible follow up activities: None may be needed, form inter-team working groups in a few areas, each group act on items as agreed, arrange for a second meeting of the participants.

For this version of the process.

## Inter-group relations..... Core theory

1. Ideally -- Seeking cooperation in service of common goals (shared, overlapping, etc.).
2. Some competition can serve having a creative edge
3. Too much competition can cause lost of synergy
4. Impact on the internal dynamics of each group (note mixed results reflecting #2 & 3 above) -- diverting of energy away from important tasks, building up if history of animosities, distortion of perception., increase in intra-group loyalty, more acceptance of a single leader, improvement in group functioning, etc
5. The less the inter-group contact/communication the more the negatives increase (unless you are dealing with very high levels of conflict, in which case more face-to-face contact makes things worse)
6. Some aspects of improvement in inter-group relations -- find common goals (or self-interests), have direct negotiations, training of key people in cooperative work/inter-group team building, etc., seek rewards based on common goals and cooperation, increasing interaction, preventing groups from withdrawing from each other
7. Gordon Allport's work on inter-group relations suggests that there are four key conditions that make for optimal relations
  - a. Equal group status -- very related to mutual respect and related behaviors
  - b. Inter-group cooperation -- a history of cooperation, patterns of cooperation, etc.
  - c. Common goals - degree of shared goals, self-interest that can work together, etc
  - d. Authority support - some authority supports and encourages cooperation

There are a variety of approaches available to improve inter-group relations. They all seem to address the above dynamics.

# Organization Mirror

Purpose: For organizational leaders, or a team within an organization, to hear the ideas of people from other organizations with which they relate (e.g., vendors, clients, neighbors, other organizations in the region, etc.)

Core Process: An “inside” group listens to, and shapes organizational improvements, with an outside group

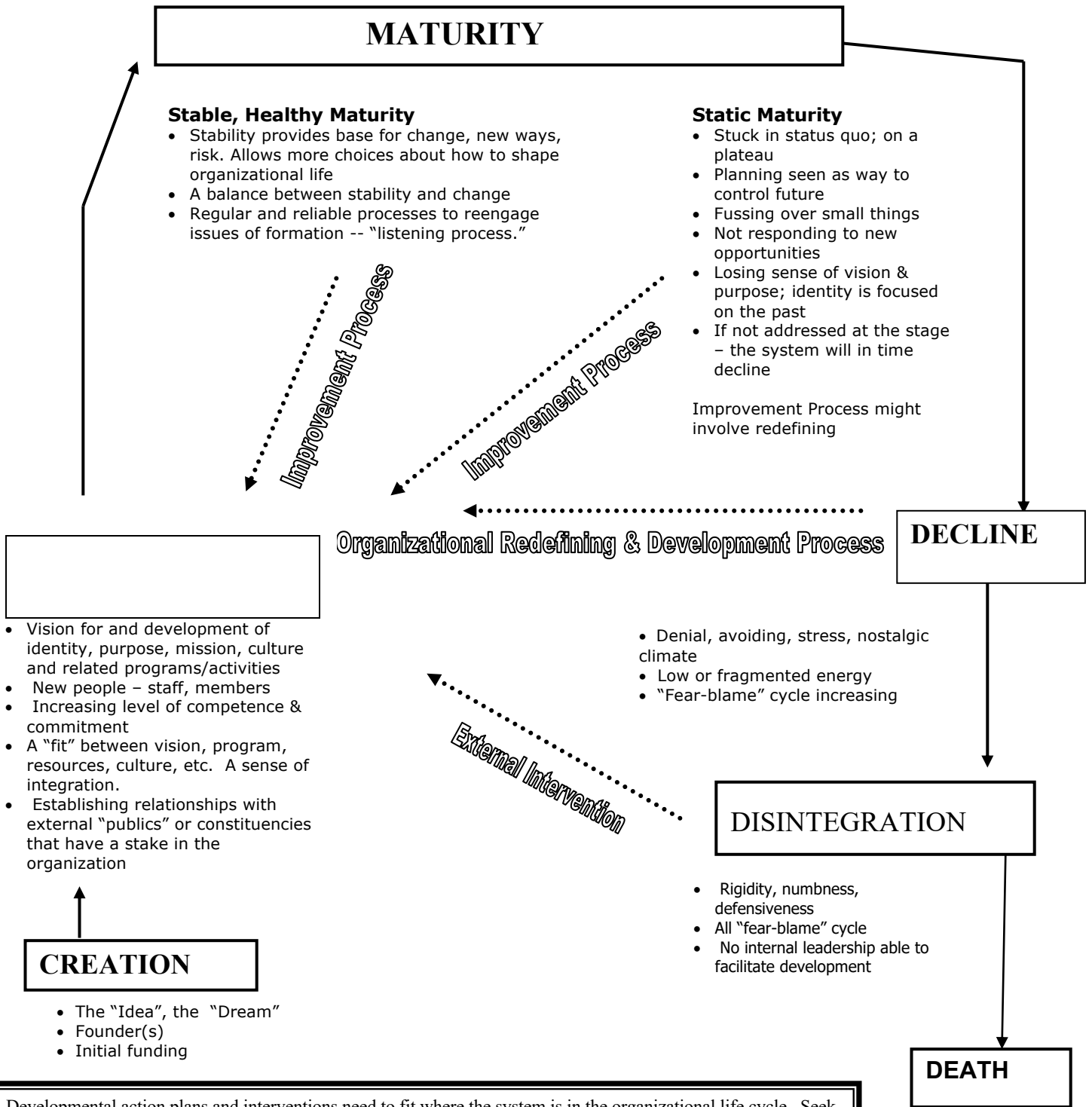
## Possible schedule

9:00 – 9:15	Overview of the session -including presentation of the issue the group is exploring; learning about
9:15 – 10:00	Outsiders fishbowl to discuss their view of the issue
10:00 – 10:10	Short break
10:10 – 11:00	Insiders fishbowl to share what they heard the “outsiders” say; and to identify any needs fore clarification
11:00 – 11:45	Whole group discussion on what it has heard so far – summarizing
11:45 – 1:00	Lunch Break
1:00 – 1:30	Sub-groups of outsiders and insiders – identify the most important (or most strategic, or most immediate) issues needing improvement
1:30 – 2:00	Reports from sub groups
2:00 – 2:30	Prioritizing process – to narrow down number of items
2:30 – 4:30	New sub-groups meet – each works on one improvement issue
4:30 – 5:30	Whole group hear sub group reports; identify next steps, etc.

When to use	Limitations	Hints on Use
<ul style="list-style-type: none"> <li>• Need to improve relationships with outside groups and/or</li> <li>• When there is some degree of interdependence to be developed and/or</li> <li>• During strategic moments in the organization’s life, e.g., visioning, transitions in top leaders, etc. and/or</li> </ul>	<ul style="list-style-type: none"> <li>• Needs careful designing, facilitation, and follow through</li> <li>• Requires at least a day</li> <li>• Needs a skilled third party facilitator; an experienced OD consultant would be even better</li> </ul>	<ul style="list-style-type: none"> <li>• The complete process - input as well as joint planning may have more relationship building impact than just doing the input by itself</li> <li>• Commit to a time when all parties will hear about progress</li> <li>• Inside and outside groups should be about the same size</li> <li>• Select outsiders who are respected in their own organizations; may have insight into your organization; will take an appreciative stance</li> </ul>

Based on material in *Managing with People*, Addison-Wesley, 1971

# ORGANIZATIONAL LIFE CYCLE



Developmental action plans and interventions need to fit where the system is in the organizational life cycle. Seek the maximum degree of inclusion, open information, free choice from options, and internal commitment that can be attained at that stage (the further into decline the less this is possible). Organizations tend to have "reasons" to not engage the formation issues: In first formation - getting caught up in building projects or growth and not also spiritual formation. In Stable, Healthy Maturity - "we don't need it." In Static Maturity - embarrassment and denial. In Decline - denial, getting caught in trying to blame someone. As the system moves from Static to Decline to Disintegration there is more need for external assistance - consultants, the "central office."