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**Ascension Press**

Interventions

*Methods and Processes for Building Healthier Parishes*

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*The heart of the tradition is Benedictine—the threefold Rule of Prayer (Eucharist, Office, Personal Devotions) explicit and implicit in the Prayer Book; the assumption of a spirituality for all the baptized as part of an inclusive and cohesive community; a sense that spiritual growth is toward living in Christ; what has been called habitual recollection or holy worldliness; and a gentle, stable, and familial orientation regarding spiritual discipline and parish life. Regardless of what other spiritualities feed us we do well to give ourselves to that primary way.*

Robert A. Gallagher

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

*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

# Introduction

This book brings together three fields: organization development, pastoral or practical theology, and ascetical theology. Congregational development is best engaged as the coming together of those disciplines.

## Organization Development<sup>1</sup>

Organization Development, or OD, is about improving an organization's ability to become more effective in doing what it exists to do. It's about fulfilling an organization's mission and primary task by developing the system's climate, structures, processes, people, and leadership. It's an ongoing, systematic effort to change an organization.

For the parish church that means improving how we engage the mission of the church "to restore all people to unity with God and each other in Christ."<sup>2</sup> That is done in a particular setting of a congregation and the communities it touches. In the case of a parish we are also concerned with improving how we go about the primary task of a parish church. Diana Butler Bass put it this way "The primary job of church is to be a spiritual community that forms people in faith."<sup>3</sup> I use the Renewal - Apostolate Cycle as a way of describing this central dynamic of Christian life. "The Cycle focuses our attention on the Christian's movement between being renewed in baptismal identity and purpose and living as instruments of God's love and grace in daily life. The Cycle is interested in both the individual's movement and in the ways in which the parish church supports and facilitates that movement. This is the primary task of any parish church."<sup>4</sup>

OD is usually seen as a long-range effort. However, successful OD work has included relatively short-term projects of 4 to 6 months as well and the more common long-term projects of two or more years. That research however is based on work place organizations such as businesses, non-profit organizations and government. These systems have full time employees who can give considerable time in an OD effort. Parish churches, on the other hand, are made up of members who are able to give less time to such work.

Sometimes that has meant that OD work in parishes is piecemeal with methods being used to address specific, relatively short-term needs. That may prove useful in a limited sense. The more significant work of broad system transformation however is only likely if the work is seen as taking place over a number of years, involves lay and clergy leaders who have received a significant amount of training, and are supported by an external consultant or program.

Behavioral science has provided the foundation for OD research and practice. Its roots are in organizational and educational psychology and motivation theory. This has included openness to such new and emerging fields as organizational culture, appreciative inquiry, learning organizations, systems thinking, and leadership studies. OD draws on a wide field and is a multi-disciplinary and inter-disciplinary approach.

In OD the organization is seen as an interplay of internal sub systems and an external environment that impact the process and outputs of the entire organization. OD attempts to

improve the organization's problem solving and renewal processes. The effort is to increase the ability of the organization to improve its own work and life. This is understood as calling for the use of people trained in the use of the theory and methods of applied behavioral science. Those people may be organizational leaders, members or employees, and/or external or internal consultants.

OD has been shown to produce results in a significant number of cases with improved financial performance, employee/member productivity and worker/member satisfaction.<sup>5</sup>

Among the factors for successful efforts have been:

- That it's a systematic attempt to identify possibilities and problems, generating strategies and solutions, and be persistent in implementing those strategies and solutions.
- The participation of employees or members in the process of assessing the system, designing approaches to improvement, and implementing.
- That the top leadership of the organization is involved and actively supportive.
- That the organization is ready for change.
- That proven effective methods are used. For example:
  - ❖ Survey feedback
  - ❖ Use of multiple intervention approaches
  - ❖ Socio-technical systems (STS)—arranging the social system to provide for more responsibility and accountability for employees/members and arranging physical space to enhance the work being done, and the human exchange happening.
  - ❖ Goal setting
  - ❖ Training, including lab training
  - ❖ Feedback and coaching

Pastoral or practical theology reflects on and informs the pastoral oversight and functional tasks of the Christian community, especially the parish church. It is interested in the functions of leadership, liturgical presiding, preaching, spiritual guidance and so on. This aspect of the work, focusing primarily on the functions, is, however, of little use for the purposes of this book.

Rather, we are interested in the theological work that attempts to understand the contemporary society and human need, and shape parish communities in a manner that will effectively address that society and those needs. Our concern is with the relationship between the parish system and its context or external environment. What kind of oversight, structure, and spiritual life do we need in the parish church to effectively form Christians, in our tradition, for this age?

Ascetical theology is especially about spiritual practice. It is grounded in an understanding of the church's spiritual teachings as seen in Scriptures and the writings of the early church. It is concerned with the on-going task of living the Christian life and reflecting upon it. What kind of person and human community do we want to form? How might the parish contribute to

that task? What are the practices that will best do that in our time? What are the “spiritual life maps” that offer us an integrated and systemic approach?

## **Congregational Development**

The following is drawn from *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Robert A. Gallagher, Ascension Press, 2008.

### ***A Definition***

- The development of the parish as a community of faith with a unique identity, purpose and dynamics.
- The development of the parish as an organization that can be understood, assessed, and improved using the knowledge and methods of pastoral and ascetical theology and organization behavior and development.

The goals of congregational development include:

A. Developing the community of faith by enabling a pattern and culture of congregational life that is:

- Rooted in our tradition
- Adapted to the local context
- Appropriate for the particular group(s) of people drawn to the congregation
- Reflective of the unity, holiness, catholicity and apostolicity of the Church.

And that:

- Renews people in their baptismal identity and purpose and sends them, in Christ, for an apostolate in family, with friends, in work, civic life and church.
- Nurtures the Christian life of people at all phases of maturity; gives special attention to guiding and equipping those of Apostolic Faith; encourages all toward a more prayerful, disciplined, and compassionate Christian life.
- Fosters a strong life and ministry of worship, doctrine, action and oversight.
- Enables people to seek the presence of Jesus Christ in the people, things and circumstances of life, through stability, conversion of life and obedience.

B. Developing the congregation as an organization that:

1. Has established 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, people development, planning and envisioning, relationship building, engaging new opportunities, crisis prevention).
2. Has increased its ability to adapt to new conditions, solve problems and learn from experience.
3. Has an increased ability to engage formation issues such as:

- A vision that is sacramentally actualized in the parish's culture. That vision includes the defining of identity, purpose, values, organizational culture and related programs and activities
- Attracting new people (as staff and/or members) who join in living within a healthy culture.
- Increased competence and commitment in liturgy, spiritual life and discipline, and emotional intelligence.
- Creating an alignment, an adequate "fit," among the various aspects of the organization's life such as income/expenses, space/program needs and possibilities, vision/resources of leadership, energy and money
- Establishing relationships with external "public" or constituencies that have a stake in the organization.

Congregational development as a field of study and category of strategic action emerged in the late 1960s and early 1970s. The major contributor to its appearance was the work of Loren Mead and Project Test Pattern (PTP), which later developed into the Alban Institute. PTP was an initiative of the national church generally concerned with evangelization but more specifically with how to best revitalize parishes. What Loren Mead quickly discovered was that the emerging discipline of organization development had application to church systems. PTP's work builds on what the church had been doing since the 1950s in the field of group dynamics and experiential education. The Episcopal Church was among the first religious organizations to involve itself in the learning and application about groups and organizations happening in universities, the military, and other organizations.

In the 1970s and early 80s there were large ecumenical training programs that equipped church leaders and consultants in "organization development in religious systems." The training often involved a minimum of three years, 300 hours of experiential workshop training, reading in the field, application projects, work with mentors, and a supervised internship. Today that approach continues in the work of the Church Development Institute (CDI), and in the more recent Shaping the Parish program.

CDI created a training program that includes organization development and has integrated ecclesiology, pastoral theology, and ascetical theology. In recent years CDI has reintegrated in its training more experiential work that helps participants in the "use of self" and group dynamics and development. CDI now offers the most complete program available in congregational development.

Three interrelated streams of thought have emerged about how to define congregational development.

For some it is about starting new parish churches. That may involve special training or not. If there is any training it may focus on a short-term, entrepreneurial approach to development or it may include consideration of longer-term development dynamics and how to start the new



parish with clarity about the primary task of formation.

Others seem to think of congregational development primarily as a division of work that includes anything related to revitalizing congregations or starting new parishes. In such cases people may have been appointed as diocesan congregational development officers with little or no training in the field.

The approach we're taking in this book is to understand parish development (or congregational development) in a manner consistent with its roots. In that sense it is a field of competency with trained practitioners who serve the church in many roles. The level of competency may range from graduate level work with CDI or a university program in organization development, to having done a few days of workshops with a national or diocesan program office.

As an approach and discipline, congregational development has something to offer just about all aspects of parish and diocesan life. Everything that impacts the parish's health and its ability to form people in Christ is related to the field – the recruiting and training of lay and clergy leadership, ways of encouraging and supporting parish leaders, how we begin new parishes, issues of the parish's financial health, and so on.

So, a search process is understood as a major intervention in a parish's life, and the methods used to carry out the search require considerable skill on the part of consultants. This isn't a place to be running volunteers through a few days of training, handing them a manual, and dropping them into a parish's life.

Another example would be using competencies of congregational development in beginning a new parish. Leaders might be helped by the field's knowledge about creating healthy organizational cultures from the beginning and its understanding of the management of narcissism in entrepreneurial work. Connecting congregational development with new start-ups might point to the need for explicit agreements about denominational loyalty and the need in the earliest stages to integrate spiritual life and growth alongside the emphases on growth in numbers.



*Not everything that is faced can be changed, but nothing can be changed until it is faced.*

James Baldwin

# What we seek in making an intervention

1. **Specific results**
2. **Sustainable over time and under pressure**
3. **Improves overall health and our ability to perform our primary task**
4. **An integration of theory, emotional and social intelligence, political smarts, and all the rest**

## Specific results

The intervention must be likely to produce specific results.

In starting any intervention, it is important to have a clear sense of the desired outcome and to also evaluate the likelihood of achieving that outcome from this intervention. What, specifically, do you hope to see at the end? For example, when we offer sessions in Anglican Spirituality, our intention is to build a core of parishioners—perhaps 20-30% of those who regularly attend—who have created and live a Rule of Life grounded in the primary traditions of the Church.

We also assume that it will take a number of years to build up these numbers and that repetition is necessary, both in the early stages and as time goes on. We target a certain number of parishioners for each session and we repeat the sessions over a multi-year cycle.

Finally, we evaluate whether our goals are consistent with the intervention. Developing a Rule of Life is directly related to building competence in the primary traditions and then being given the tools and methods to develop a Rule that addresses where the individual is now and where they can go in the short and medium term. Through experiential education, readings, and the opportunity to practice and reflect between sessions, we create an intervention that builds competence. In the final session, we have participants develop a Rule of Life. The intervention is likely to produce specific results and we will have a pretty good sense of whether it does because many of the outcomes are measurable.

The broader experience and research in organization development also needs to be taken into account. We know that there are some broad categories of interventions that tend to be successful. For example, we know that if you increase autonomy and participation you tend to get higher job satisfaction, commitment, and performance. Accordingly, methods that take these factors into account will, on the whole, be more successful than ones that don't, regardless of the initiative's content or subject. In the Shaping the Parish program all the developmental initiatives or interventions provided to participants are likely to produce certain results. We know that because others have done them, or similar ones, and had results improving parish life. The intervener does, however, need to take into account a variety of considerations to insure that the intervention is appropriate in their parish at this time.

This of course assumes that the person or group has the competence needed for the work to be done. We undermine ourselves in three ways.

In many parishes we allow people to control or strongly influence areas in which they have little competence, and in the end we rarely get the desired results. Or we delegate to people with the needed competence and then permit a person or group *without* the needed competencies to interfere. Finally, vestries still micromanage the work in many situations where the person or group does have the needed skills and knowledge.

## **The intervention must be sustainable over time and under pressure**

The parish must be able to carry on the change process given its resources and competence.

This involves using a process that is grounded in sound intervention theory and practice. Chris Argyris describes it as a process that provides people with valid and useful information for making decisions; where decisions derived from the information are made on the basis of free and informed choice (not coercion or habit); and that the processing of the information, and freedom of choice, creates stronger internal commitment within people.

## **The intervention is directed at improving the parish's overall health and its capacity to perform the primary task**

There are many things to do in the parish—often worthy, virtuous, and interesting things. But they do not necessarily improve the parish's overall health and they are not necessarily able to increase capacity to perform the primary task. That doesn't mean those things shouldn't be done. It does mean that they need to take a back seat to, or be integrated with, actions that significantly advance health and our ability to perform the primary task.

In determining whether an intervention is directed toward the primary task, you must first be clear about what the primary task is (e.g., the spiritual formation of members), and then evaluate how effective the proposed initiative is likely to be in terms of both producing specific outcomes related to primary task, and how likely it is to be sustainable over time and under pressure.

Related to this is the question, will it significantly affect the overall climate, sense of energy, and revitalization of the parish's spiritual life? Some of these considerations of broader strategy and relative importance are discussed more fully below.

## **An integration of theory, emotional and social intelligence, political smarts, and all the rest**

I had a situation recently where the difficulty of integrating all the various pieces for an effective intervention became apparent.

These were all people who had been through the two-year Church Development Institute; done workshops in human interaction, design skills, and conflict management; and came with wide experience working in the church. People they worked with respected and trusted them. They are smart professionals.

They were going down a road of making a conflict much worse because they were missing pieces of what goes into a successful intervention. They just were not seeing some critical elements in dealing with a conflict they were parties to.

They were taking what Speed Leas would call a Level One conflict (we have a “problem to solve”) and making it a Level Three or Four conflict (“Contest” or “Fight/Flight,” wanting to win or trying to get rid of the opposition). For information on Leas model see this endnote<sup>6</sup> and see the section on conflict later in this book.

In response to news they found disturbing they failed to engage the other parties for a period of five months. It was as though they had become frozen. Attempts to reach out to them were not responded to. The people on the other end of things didn’t even realize they had any level of conflict going on. It was interpreted as the usual slow response from that group.

After five months there was a response that made it clear that the long silence had a more sinister meaning. The response made an accusation that suggested a lack of integrity and feelings of betrayal. Oops! The silence was a “cut off” behavior. This was a relatively high level conflict between what at this stage involved 5 people.

It was about to become much worse. The response also insisted on taking this conflict for discussion into a setting that would involve many more people. It would jump the players from five or six to twenty.

Note what’s happened here. One side has apparently nurtured a fair amount of anger and resentment over five months. The other made a false assumption about the meaning of the five-month non-response. But now that accusations had been made reflecting on the integrity of one side, that side now found themselves immediately in a much more serious conflict than they had imagined. Now they were also having Level Three and Four feelings and beginning to behave that way.

The two issues facing all parties were: 1) can we ratchet ourselves down to function at a Level One again? That would only be possible if both parties were able. 2) Could the one party drop their insistence on involving more people and try resolving this with those directly involved?

What were some of the missing pieces? Most especially in this case what were the misunderstandings of theory and what were the missing emotional and social intelligence skills?

The misunderstanding of theory was most obvious in the attempt to spread the conflict by involving people that up to that point hadn't been parties. It's 101 theory that you start face-to-face conversations with those who are already engaged in the conflict. That's partly to not drag a larger group into the conflict and make it a bigger problem, it's also because a smaller group has easier communication.

The insistence that a large group be brought into the discussion while having the apparent of being inclusive was in fact a formula for escalating the conflict to a higher level. It would only make things worse.

From Karl Albrecht's work on social intelligence there are two elements that stand out: situational radar—the capacity to read situations and act effectively based on that and empathy—the ability to create a sense of connection with others.

Other standard lists of emotional intelligence competencies can be used to note other missing elements such as: recognizing our emotions and their impact on others, seeing the connections between our feelings and our thinking patterns, openness to new perspectives, flexibility in coping with change, our self management of what we feel and our moods, reading emotional dynamics, seeing power relationships, dealing with difficult issues straightforwardly, spotting potential conflict, bringing disagreements into the open, and deescalating them, developing win-win solutions,

In this arena of emotional intelligence the central issues may have been first around the capacity to know how you're feeling (for example, maybe one party is feeling confused, angry, betrayed and the other frustrated and hurt by the 5 month lack of response) and, secondly, in the need to decide to operate at with Level One behaviors - expressing interest, accessing curiosity, asking for information while not engaging in behaviors that are related to higher levels.

Another possible aspect of what was happening in this case was about political power. It was possible that the one party was simply consolidating power in the system and that the higher level conflict behaviors were, consciously or sub-consciously, an attempt to isolate and damage the other party. Motives are hard to know, even our own.

# Outcome Considerations

We're seeking three general goals as we intervene in parishes to make them healthier communities and institutions.

1. Long-Term and Important Improvements: seeing what's truly important
2. Critical Mass: developing enough weight around what's important
3. Internal Commitment: developing ownership around what's important

## Long-Term and Important Improvements

We want improvements in parish life that will last and be worthy and valuable. The starting place is to be able to see what is really important.

Clergy and lay leaders all too often pour themselves into (and burn out from) efforts that fail to have much impact. The rector works hard for ten years and within a year of the arrival of the new rector there is very little left of what the prior rector worked so hard to achieve.

Leaders spend a great deal of their time on the routine business of parish life. We celebrate sacraments, provide pastoral care, and notice where the roof leaks. We create new programs, reorganize committees, and develop vision and mission statements. That's just going to happen. Much of it is necessary. It's only a problem when we never get around to the important work, the work that really develops and transforms a parish community.

What is immediate and urgent drives us, while the important work waits for when we have more time. We need to see what's important and we need to know how to provide adequate attention to that.

Diana Butler Bass wrote, "The primary job of church is to be a spiritual community that forms people in faith."<sup>7</sup> That's a statement about the primary task of the parish church. Understanding the primary task of any organization is the starting place for being strategic.

The second step is to invest resources of time, energy and money around the primary task. This means creating ways of being effective in doing that work. Among the things that are really strategic for the parish are—developing the capacity of members for spiritual life and emotional intelligence; building the capacity of the parish leadership for managing change; relationship building; thinking about where the parish can be in a few years; noticing new opportunities as they emerge; people development; accepting responsibility for own Renewal-Apostolate cycle as part of the parish community; and facing into crises that are truly about parish survival.

Once we have defined what is strategic and invested resources in those areas, then we are faced with our ability to maintain a focus on what's strategic. Later in the "Considerations" chapter there is an exploration of what it takes to focus on strategic matters. In strategic

management parish leaders establish direction, navigate toward the direction and shape the parish's culture in support of that direction.

The discipline of pastoral or practical theology has an especially significant weight in regard to seeing what's important for the well-being and future of a parish church. It is the aspect of the field having to do with our shaping parish communities that effectively speak to the real and deep needs of humanity. This requires an understanding of contemporary society, especially the immediate context of a particular parish. Ascetical theology comes into play as we seek spiritual practices that will provide the grounding needed by individuals and the parish community.

## **Focusing on Strategic Issues**

### **The Demand System**

*Heavenly Father, in you we live and move and have our being: We humbly pray you so to guide and govern us by your Holy Spirit, that in all the cares and occupations of our life we may not forget you, but may remember that we are ever walking in your sight; through Jesus Christ our Lord. A Collect for Guidance, The Book of Common Prayer*

The prayer rightly assumes that we lose track of what's most important. We get caught up in all the "cares and occupations of our life." We just do, and we will.

In organization development there's an assumption that all organizations have a "demand system." That demand system is the web of expectations and pressures calling for energy, time and money. The demands may be external or internal. All parishes have the regular flow of work it must attend to. There's the occasional crisis, problems to solve and deadlines to meet. We also get caught up in work that just isn't very important to what we exist to do and be. Some meetings, phone calls and e-mail are like that. Most of us also have routines that are in fact either busy-work or time wasters. All those things, the important and the unimportant, consume most parishes and most of our individual lives.

The activities that transform parish and personal life can take a back seat to the routine business that must be done and to the unimportant interruptions and trivia of life. What renews life and develops the parish waits for when there's time. This means relationships don't get built, people don't receive training and coaching in spiritual practices, strategic issues aren't addressed, and so opportunities are missed and crises not foreseen and prevented. These transformational activities, specifically because they aren't front-and-center in most people's expectations, and specifically because no immediate disaster will take place if they aren't attended to, generally do not form part of the existing demand systems of most parish churches.

We can turn all that around by consciously adding elements to the demand system. We need to add activities and resources into parish life—literally put them on the calendar—that



keep the important, transformative matters in front of us. In congregational development it means things like a yearly leadership retreat that works only on strategic matters; having a skilled external consultant; leaders receiving in-depth leadership training for congregational development, and developing a richer parish life of prayer through the Daily Office, and increasing the ability of members for participation in the Eucharist and their own personal devotions.

In relationship to spiritual practices it may mean taking actions such as:

- Scheduling Evening Prayer Monday through Friday and recruiting teams of two or more people to cover each evening.
- Parish clergy changing their schedule so they can be at Evening Prayer most days.
- Creating and scheduling a Foundations Course, with at least three units of three sessions each per year.

As Stephen Covey said, “The key is not to prioritize what’s on your schedule, but to schedule your priorities.”

### **The case of Trinity Parish**

Trinity Parish is trying to maintain and improve a healthy life while also dealing with major transitions related to its property and a need to increase membership. They want to continue working on health and growth while also going through a major transition regarding property and identity. This parish may face more than the usual dangers around the demand system issue.

Left to its own devices, Trinity is like most parishes. They enjoy their life together, people are supported and nurtured, and people grow in Christ—all the good things we hope for in a parish church. The difficulty is that in addition to those things, Trinity needs to put a lot of time and energy into intentional development around health and growth. To do that requires a context of accountability and support, including a system of mutual accountability and expectations with the diocese. Some of those issues are outlined below.

### *There’s a need for partnership with the diocese*

Partnerships between parish and diocese can be simultaneously supportive and frustrating. Will Schutz, who has worked with NASA, AT&T and the World Bank, maintains that all such relationships need to attend to three recurring phases:

**Inclusion**

Accepting the need for all parties being at the table, that each brings something necessary. From the diocese: an acceptance of the validity and need for this parish and this initiative. From the parish: a need for the perspective and resources of the diocese.

**Control**

The need for both parish and diocese to have appropriate influence in the relationship. From the parish: a sense that they are maintaining control over their own future, that they aren't being micro-managed from "above." From the diocese: a sense that they are able to have enough influence to be responsible stewards of the diocese's resources and reputation.

**Openness**

The need for a direct, timely, respectful, and thorough exchange of feelings and thoughts.

For more on I-C-O see the page in the Background Readings below.

Both parties have some common needs, including that they end up with a parish large enough to be financially self-sustaining in a reasonable period of time. To do this requires, 1) that the initial decisions be set up to maximize the likelihood of adequate growth; and, 2) that the parish and the diocese create an ongoing mutual accountability in their efforts to get to a size that is self-sustaining.

*There's a need for the parish to live within a context of health & growth*

This is about creating a context that keeps drawing Trinity back to the issues of health, viability and growth. Leaders need to identify the resources available locally and nationally to help establish such a context. Many dioceses have consultants available. It's worth getting information on the training and experience of the consultant before agreeing to a contract. Some dioceses have a program in congregational development, such as Shaping the Parish™ or the Church Development Institute.

We can be unmindful of the web of expectations, pressures, and beliefs that inhibit our ability to do what's necessary for a healthier parish. We get driven along through the weeks and years by the routine demands of parish life. We assume there will be a time when we have the time to work on all the strategic and truly important developmental possibilities. It's a never to arrive time in the future. Developmental work occurs when we make it part of our demand system by creating a parish development team, using a skilled external consultant, having a yearly leadership retreat that is only about strategic and developmental concerns, and attending a program like Shaping the Parish™.

For a parish, or any organization, to develop, it needs to give attention to strategic issues, including building its capacity through the development of its members and staff, capital

improvements, and attending to long- range or systemic concerns. The chart below draws on the thinking of Stephen Covey. In Organization Development terms it explores the way the demand system works.

What the chart shows is how some things have urgency because the system is arranged in a manner that draws our attention. The parish has certain routine activities and existing groups that “demand” our energy and time. Because we expect coffee hour on Sunday some members do the shopping and setting up. Many participate because it’s there to participate in. Because there is a financial committee meeting very third Wednesday people commit the evening and some do the needed advance work. Because June is agitated about the selection of hymns two members listen to her for 20 minutes after Mass. The parish’s routine business, and even the interruptions, have a built in urgency that call on us to pay attention to them.

Other things can wait. They don’t press themselves upon us. They are not urgent matters; even if they are important; even if we acknowledge their importance when asked. Few people notice if we don’t do them. Creating and conducting an adult formation program, increasing Eucharistic competence, coaching people in prayer life, may all be seen as worthy activities. But if they aren’t done few object.

In understanding how this works we can confuse ourselves by using the word “should.” As in - “people ‘should’ feel an urgency about developmental matters.” Maybe we “should” but we rarely do. Developmental work doesn’t get experienced as pressing.

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<b>I. Normal Parish Business</b> <ul style="list-style-type: none"> <li>The regular flow of work that the parish exists to do and does in support of that (such as the Eucharist and the choir rehearsal)</li> <li>Crises</li> <li>Pressing problems</li> </ul>	<b>II. Parish Development</b> <ul style="list-style-type: none"> <li>Building parish capacity for health and the primary task</li> <li>People development, an increase in competence for managing their spiritual life or doing the institutional work of the parish</li> <li>Relationship building and trust development</li> <li>Establishing a direction to move in (planning, visioning, identifying the three things that would most improve parish life)</li> <li>Engaging new opportunities</li> </ul>
<i>NOT IMPORTANT</i>	<b>III. Interruptions</b> <ul style="list-style-type: none"> <li>Some mail, phone, meetings, reports.</li> <li>Other people's inconsequential issues.</li> </ul>	<b>IV. Trivia</b> <ul style="list-style-type: none"> <li>Busy work</li> <li>Some mail, phone calls, meetings</li> <li>Time wasters</li> </ul>

*How to Improve the Parish's Health:*

	<i>URGENT</i>	<i>NOT URGENT</i>
<i>IMPORTANT</i>	<b>I. Normal Parish Business</b>  <b>MANAGE</b>	<b>II. Parish Development</b>  <b>FOCUS ON</b>
<i>NOT IMPORTANT</i>	<b>III. Interruptions</b>  <b>AVOID</b>	<b>IV. Trivia</b>  <b>AVOID</b>

## **Ways to Focus the Parish on Strategic Issues**

Manage the parish's routine life and business in a competent, thorough and efficient manner. Take care of what must be taken care of and do that well.

In order to get at the developmental issues work at establishing structures and processes (i.e., organizational behaviors) that focus on quadrant II. Examples include:

- A yearly leadership retreat focused on strategic issues, with at least the vestry and rector and perhaps with other key leaders.
- Use of a congregational development consultant.
- Placing on the parish schedule things like: Adult Foundation Courses sessions in the winter, spring and fall, annual quiet days and spiritual retreats,
- Establishing a pattern of only dealing with strategic matters during every other vestry meeting or creating a strategic management group to focus on those matters while the vestry attends to more routine issues related to property and finances.
- Form and train a parish development team. If your diocese has a Shaping the Parish program or a Church Development Institute use the program to support and equip the team.

What you're doing when you do these things is creating a new "demand system." A yearly leadership retreat will usually generate energy among those attending. People will want to follow through on the ideas and decisions of the retreat. Things will be accomplished in the following months. And after several months the momentum created by the retreat will lessen. But for a few months it will have served as a demand system for important issues.

Giving adequate time to strategic issues is likely to result in an organization that has a sense of vision, balance, discipline, and fewer crises. Again, one of Covey's central propositions is 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 Quadrant II.

## **Processes and structures to help a parish stay focused on developmental and strategic issues**

- Have the person with passion about an issue take the lead. This assumes that the person is willing to work within a process of listening to the larger community and be responsive to the priest's views on priorities and action.
- Recognize that nothing will happen if the rector (vicar, priest in charge) isn't committed to it. This is a simple reality of organizational life.
- Working Groups. Create groups based on the energy of the moment. Assume two to four months of work before the energy fades. Create objectives for the group that can be accomplished in that time frame. Assume work will get done in spurts of energy.
- Leadership Conference/Retreat. A weekend with two other parishes around a specific issue they have in common. Time at the conference will shift between all of the parishes simultaneously receiving some training or instructions from the consultants, to each parish doing its own work with the consultant moving among the parishes.

Possibly have follow up check-in meetings a few times over the next year, something that specifically creates an external demand system to support strategic initiatives. Assume a second conference/retreat the following year. Consider opening the retreat to others in the parish beyond the vestry, especially to people who might follow through on the work. The agreement needs to be: Come to the retreat if you will fully participate and be willing to do follow up work for the next two to four months.

- Structure the vestry's time use. Try doing every other meeting on only developmental and strategic issues (no routine reports or business), OR use the first half of all meetings for developmental work. Don't meet every month. Don't have a vestry meeting in the same month the vestry has a leadership conference.
- Have focused times of check-in, input and testing with the whole congregation. Don't do so much of this that there's little time for getting work done.
- Use the consultant's time. The consultant's presence can help draw attention to the strategic issues. There may also be a value in having the consultant focus on any special areas of expertise he or she brings.

## Strategic Management

In strategic management leaders establish the parish's direction, navigate toward the direction and shape the organization's culture and resources to advance those ends. It's like jazz: improvising on a theme.

Probably the biggest mistake made in this area is when a parish concentrates on strategic planning. Developing a document is the usual outcome. It may help to change the language. Instead of saying "We are developing a strategic plan" say "We are focusing on strategic management." That can be done in many ways—we may identify three long-term goals to improve parish health and effectiveness (and three things to do this year that will move us in that direction), we may develop a strategic plan, or we may do something else.

### *Getting the Parish Focused on Strategic Matters*

The overall task is to get the parish to pay attention to and act on opportunities for its own long-range development or transformation, the building of its capacity, and the prevention of crisis.

1. Focus on the *primary task* and core processes of the organization. Forming people in Christ so they may seek and serve Christ in the world is the task.
2. Attend to the *external forces* that offer new opportunities, place constraints on the parish and threaten its survival or capacity to advance its purpose.
3. Be clear about where the parish is in its *life cycle* and take action for its development appropriate to its life-stage.

## Methods in Strategic Management

1. Create the space and time and pressure to attend to strategic matters

This involves setting aside or containing the immediate “crisis”, the pressing project, interruptions, and all the business generated in the day to day operations of any organization. The “demand system” that is created by the endless flow of expectations, pressures and requests needs to be re arranged to create a new “demand system” that helps the organization focus on strategic matters. Establish structures and activities in the organization’s life that are given over to strategic matters. John Covey writes about how we need to learn how to schedule our priorities rather than trying to prioritize our schedules. Possibilities include:

- a. Setting aside the first half of every staff and vestry meeting to work on strategic issues. Or give every other meeting entirely over to strategic issues; no financial or property reports at all.
- b. Have a yearly strategy retreat (a leadership conference/retreat). Use the time to build the leadership team and work on other strategic matters. See the material on Leadership Conferences later in the book.
- c. Schedule a series of special meetings to work on one strategic issue. Cancel a few regularly scheduled meetings.
- d. Use an organization development consultant.

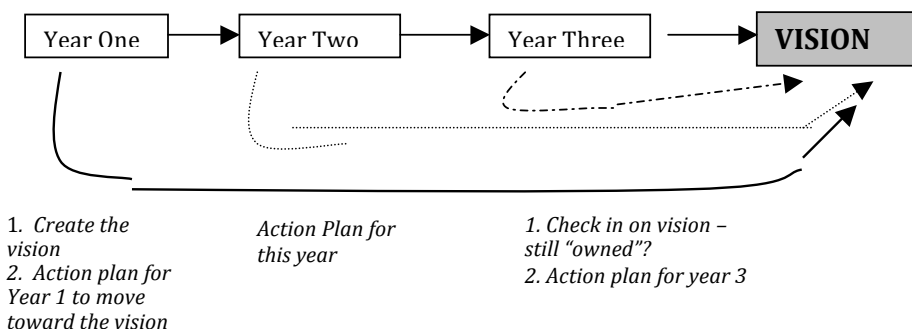
2. Use a Value-Centered Management Approach

A value centered approach can help the organization establish a stronger sense of identity and purpose. The approach provides another guiding mechanism that can keep people focused on essential issues.

3. Use Some Method to Establish a Strategic Direction

a. An Unfolding Vision Process

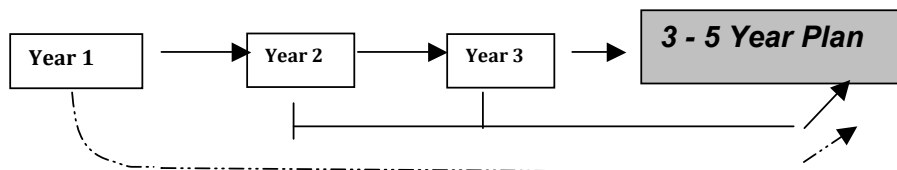
This involves creating a vision for how the parish might act and be in the future (3-5 years.) Notes may be made on people’s ideas for what may need to happen in future years. That may influence both the vision statement and this year’s plan. Then each year a short action-plan is created to move toward the vision during the coming year. The parish also “checks in” on the existing vision. Revisions are made as needed.



The unfolding vision process allows for flexibility while maintaining a sense of direction. It may make some people anxious not to have each year “pinned down.” It does tend to keep the focus on where you want to go rather than on particular steps.

#### b. Linear Planning

This involves both creating a statement of targets (i.e., results, outcomes, vision) that the organization wants to meet in three to five years and developing a plan for what will be done each year to move in that direction.



*1. Establish Desired Long Term Results. What you want in 3 - 5 Years*

*2. Plan out the goals and objectives for each of the 3 -5 years*

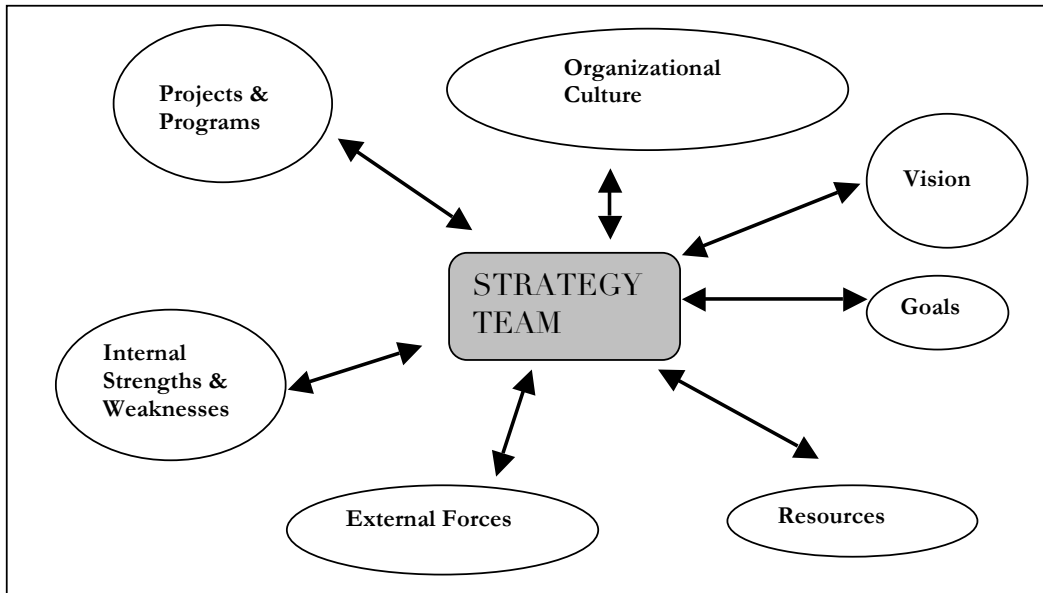
*Each year - revise as needed*

Linear planning provides a high degree of control and detail. If well done, it can provide for needed flexibility. However, it seems to have a tendency to give a “set in stone” tone to the process, even when we add disclaimers to the document. Attempts to revise yearly plans are often seen as signs of failure. It is a comprehensive and systematic approach but tends to be slow and therefore frustrating. The detail of it, touching every aspect of organizational life, can set off strong and broad resistance.

#### c. Organic Planning

Some would say that this method isn’t even planning. There may not ever be a written plan. The parish arranges itself to have a well-trained, disciplined strategy team. The team has the job of paying attention to all significant elements of the system and to help bring each into a process of mutual adjustment with the others. The effort is driven by an ongoing process of gathering and reflecting on information from each area.





Organic planning requires well trained, disciplined people who can quickly analyze information and take action. This may best be used in parishes working in a rapidly changing environment, facing immediate opportunities, or dealing with a crisis. This approach may encourage the continuing involvement of members and staff while allowing for timely action. Its comprehensiveness will depend on the skill and orientation of the strategy team.

### C. The Rector's Role in Strategic Management

1. Define the vision. The rector needs to have very high ownership of the vision if the organization is to make progress. It is usually important for the rector to play a central role in drafting the document whether three statements of direction or five pages of a vision.
2. Keep the vision, primary task, values, etc. in front of the parish. The rector along with other leaders need to find a variety of ways to keep these guiding mechanisms before individuals and teams as they do their work. The clearer they are in people's minds, the more individuals and teams can be self-directed. The desire here is to guide the use of resources (human, financial, material) by the parish's stated strategic direction.
3. Maintain the system for strategic management; make sure that there is the space and time for it.
4. Structure ways in which the system and subsystems can "listen" to the organizational environment. Vary how it is done from time to time, e.g.
  - a. By environmental segments (suppliers, those we serve, the competition, those that regulate and establish mandates for us.)
  - b. By assessing the demand system. This would include the demand system that is both internal and external. Map out the groups, individuals, organizations that want, expect or demand something of the parish. Map out the current picture. Note the systems involved

and what they are seeking. Map out the current response system. Then map out the demand system you would like to see in three to five years.

c. By factors that influence the parish

<p><b>WIDER CONTEXT</b> Global and national, social, cultural, economic trends and forces that are impacting the parish</p>	<p><b>LOCAL CONTEXT</b> Regional, neighborhood, social, cultural and economic trends and forces that are impacting the parish</p>
<p><b>WIDER INSTITUTIONAL</b> The policies, reputation, use of resources of the larger institution you are part of (in this case it would be the diocese, the national church)</p>	<p><b>LOCAL INSTITUTIONAL</b> This is the parish itself - dynamics, culture, strengths, values.</p>

5. Take action to mobilize resources around strategic goals. Leaders need to facilitate, guide and insist that the parish “stack resources” around strategic matters.

6. Resource yourself as a leader. Arrange your own life in a way that enables you to use your strengths, develop new competence, keep perspective and stay centered. Advance training and case studies with other leaders is usually a help. Try regular coaching sessions with an organization development consultant to look at system issues. Use a therapist to discover and manage how your own family dynamics may be influencing your work. Seek spiritual guidance to stay in touch with your own best self, your own integrity.

7. Work with a strategy team. Bring together a team that will be your partners in strategic management. People who can think and act strategically, be collaborative with you and each other, and are committed to the organization’s vision.

**D. Areas In Which Strategic Management Is Used**

1. Total Parish - Regarding the whole system, its mission, values, vision, new initiatives, etc.
2. Project or Program - A particular work of the parish. Assessing its “fit” with the larger parish’s values, vision, and culture; whether there are other organizations that do it better; the cost (high-low); and whether it is at the heart of the organization self image (because of history or values in the organization, its integrity.)
3. Resource Support - Arranging for the resources needed for the whole parish or a program to function well.
4. Institutional Structures, Processes, Systems - Developing the parish so it has the ability to carry out strategic initiatives. This ranges from increasing the skills of working groups for decision making and problem solving to retaining key staff, to providing needed technology.

**Critical Mass**

When you intervene you want to develop a critical mass of support and involvement for your

effort. You need enough “weight” to support the effort. Enough energy to get the work accomplished.

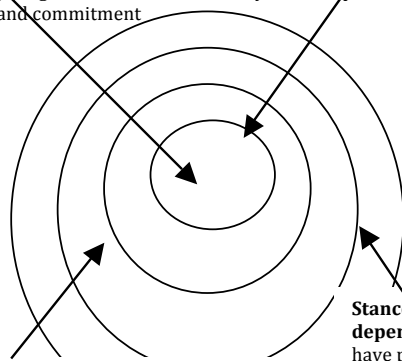
Critical mass theories are also about building the overall level of commitment, competence and emotional maturity at the center of the parish so that it grounds the system in a mission orientation and an organizational culture that supports the mission. This can be diagramed as a series of circles, one within the other. Those at the center will share more of the “common language” of healthy and useful skills, knowledge, attitudes and values

### 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 parishes -- Build a “critical mass” of people with a stance of *High Commitment & Competence* and *Supporters*. Develop 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 parish’s culture

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One way of understanding critical mass is to see it as four elements in a parish's life.

- A center of those with a high level of commitment and competence for the endeavor. In terms of the whole parish this might be those providing either a center of spiritual maturity that grounds the parish in God's life or those offering leadership in a variety of institutional roles. Obviously it's best when both aspects are present in all those at the center but that's rarely the case.

If instead of the whole parish you just look at the vestry. The question is "what are the competencies needed to be effective on the vestry?" The answer to that will depend on whether the vestry in a given parish is primarily focused on its canonical duties around property and finances or if they do that as well as provide leadership in other areas. It will also be influenced by the size of the parish. All vestries are likely to need competency in things like teamwork, trust development with the rector and the larger congregation, an ability to mobilize others around projects, and oversight of property and finances. Some vestries require a capacity to think and act strategically.

In regard to a particular initiative or project being undertaken you'd have the same initial question, "what are the competencies needed to be effective in this work or ministry?" It might be adult formation or a project on arts and spirituality. To be successful you'd need some people with high commitment and competency, some who will invest themselves in the project's success.

- Then there's a circle of people we've labeled as "Supporters." In almost any organization not everyone will be highly competent and committed. Some will offer that at times in the parish, others on the school board, and still others at work or in the family. In the parish you need enough people willing to perform specific functions, pledge, and attend.

The vestry needs people who will be adequately committed and competent. But this may not be one of the things that for those people they are willing or able to offer a high level of commitment and competence. They are willing to help make things happen but they will have limits around that.

In a specific initiative there's usually a need for people willing to pick up a piece of the work or simply participate regularly in the activity.

- "Just going along." This group is along for the ride. We are all there sometimes. We are all in that place in regard to most institutions in our life. The parish's institutional leaders make a mistake when they suggest that there is something wrong about being in this role.
- The outer edge group consists of people given to cynicism, counter-dependency, and/or passivity.

The strategy for developing critical mass is:

- Build the core of those willing and able to have high competence and commitment. Start by being clear about who must be part of the core, e.g., clergy, parish lay leaders, members of a

parish development team. Focus on people who by their position in the parish have significant influence on carrying out the primary task and the parish culture.

Acknowledge and reward those who are in this group.

Provide regular training and coaching to support and develop them.

- 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 parish’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.
- Including Everyone

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

*“Just Going Along”* - Include them in activities around the mission, core values, etc.; invite them to develop increased competency; engage them through the regular processes of the parish rather than in special one-to-one sessions. Listen to them in the processes where they share their ideas along with others. Sharing the vision with them; let them know what you need and expect; and inviting them to move forward with the parish. Do not over react to their low commitment or competence.

*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 parish’s direction and culture; invite the person to join in making the vision work. If their stance and activities threaten the parish’s direction and culture seek ways to create boundaries that limit their influence.

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.

- If there is an inversion of the “emotional system” that must be addressed. Occasionally parishes evolve into a situation where the emotional center of the organization is held by those with *stances of cynicism, counter-dependency, and passivity*. The task will be to displace those at the current center and establish a “critical mass” as described. Parishes or subsystems of the parish can find themselves captured by a form of emotional coercion by people caught up in one of these stances. Others who may be more committed, competent or emotionally mature back away from leadership.
- Decide on the how critical mass needs to work in this particular parish at this stage in its life.

Most parishes 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. Parishes need to include these people because of our mission and the nature of the church. We don’t assume everyone in a parish church will have high competence and commitment. There’s space for a broad range of proficiency in faith and competence in managing the institution. We do rightly assume there are organizations that because of their work require all its members to have high commitment and competence, e.g., Navy Seals, the ordained leaders of the church.

Critical mass models invite parish leaders to build from the center and to stop the tendency to obsess about "fixing" the problems and dysfunction at the edges. New and unskilled leaders are especially inclined to focus on the “difficult people” or those who constantly demand personal attention, or the crisis of the moment. A critical mass model suggests that we give much more of our time and energy to developing the center. Support and build the capacity of those willing and able to more fully give themselves whether to the overall health of the parish or to a particular project that moves toward health.

The emerging field of network science may help us understand how a critical mass develops. Network science studies how behavioral changes spread through social networks. There’s an obvious link to developing and spreading emotional intelligence, sound spiritual practice, and virtues such as kindness, patience, gentleness, courage and perseverance.

These social networks are of people in face-to-face contact, people we see regularly. Researchers are looking at how the structure of these networks affects the adopting and sustaining of habits. There’s some evidence that networks of overlapping social ties were the most effective. That’s to say, we don’t know everyone in the network. In such networks people catch things from one another.

“Most of us are already aware of the direct effect we have on our friends and family; our actions can make them happy or sad, healthy or sick, even rich or poor. But we rarely consider that everything we think, feel, do or say can spread far beyond the people we know...As part of a social network, we transcend ourselves, for good or ill, and become part of something much larger. We are connected.”<sup>8</sup>

Parish leaders don’t control the social networks that exist within and beyond the parish. But they can encourage social connections and look favorably upon friendships in the parish. They may also influence those networks through the overall culture, climate, structures and processes of the parish. That has the capacity to build a critical mass around healthy and faithful practices.

Malcolm Gladwell’s concept of the tipping point<sup>9</sup> is related to the idea of critical mass. A tipping point is when the impetus for change becomes unstoppable. He defines a tipping point as "the moment of critical mass, the threshold, the boiling point."

Gladwell believes, "Ideas and products and messages and behaviors spread like viruses do." To facilitate critical mass around a healthier set of parish habits we might pay attention to Gladwell's notion that three types of people are needed: 1) connectors, those who easily make friends and build connections, 2) people with the new and needed competencies such as spiritual practice and emotional intelligence, and 3) people with skills at persuading and negotiating. Not much good will happen in a parish if leaders discourage social connection, and/or are unskilled in the spiritual life, and/or are not able to draw members toward healthier practice.

The Shape of the Parish model is an example of a critical mass approach.

The Shape of the Parish model assumes that developing a "critical mass" around spiritual life and practice has the effect of drawing more people, and the parish as a whole, into a deeper relationship with God and the church. The existence of a critical mass of Apostolic Faith people in a parish can orient the parish toward Christ and away from its preoccupation with the more trivial aspects of religion and parish life. By their behavior and character those closer to the center contribute to establishing a climate, "an energy not their own," that attracts others toward the center. By living the faith they draw others deeper into God. They become a means of grace for the parish by their contagious influence.

Seeking to develop a critical mass of people of Apostolic Faith in the parish making up 15 – 20% of Sunday attendees might be a rule of thumb. That would, in most situations, provide the weight needed to orient the parish in a healthy direction. What's needed is a condition where those of Apostolic Faith and Practice are enough of a critical mass that they are setting the tone, their reflection of God's love and beauty is part of the climate

In addition, leaders need to facilitate and strengthen the "critical mass" by firmly and gently tilting the structures, processes and climate of the parish toward maturity and health. The whole atmosphere of the parish says that there is more; more than we have yet experienced and known. The parish climate needs to be one of prayer, hospitality and humility.

The grounding of the parish in health and faithfulness then is enlivened; made real in the lives of men and women. It's in the habits of people not just the statements of leaders.

There are several areas in which special attention might have rewards:

- Use a Foundations Course<sup>10</sup> approach in creating a "critical mass" of members who have some competence for living the life.
- The competent participation of a critical mass of the congregation in the Eucharist
- The development of a Eucharistic spirituality among a critical mass.
- The parish's Eucharist is deepened and enriched by the presence of a critical mass of members who join in the Daily Office and some form of personal devotions during the week.

Using Shape of the Parish as a starting point, there are three broad objectives that are part of a critical mass strategy.

### 1. Nurture the Shape

If there are no people of Apostolic Faith, seek ways to establish a core of people in the parish community; if there is no Vicarious ring, build relationships with other communities of people. Assume that it will take years to do these things.

### 2. Accept and Invite

Take a stance in which you *accept* people wherever they are in the journey and *invite* them to go deeper. Include people in a manner that respects and loves them for who they are now while also seeking opportunities to offer new ways and new life.

### 3. Set Loose the Dynamic

Root the overall climate of the parish in Apostolic Faith and set loose the dynamic by building the appropriate culture.

We can see a Shape of the Parish type understanding in William Temple's passage on the organic reality of the Body, "the stream of redemptive power flows out from the church through the lives of its members into the society which they influence." (*What Christians Stand for in the Secular World*)

You can see the same orientation when Bishop Kilmer Myers wrote, "One of the main tasks of the parish priest is to train the militant core of his parishioners in such a way that they understand as fully as possible the true nature of a Christian parish."

And in *Pastoral Theology: A Reorientation* Martin Thornton presented his understanding of the parish church as the Body of Christ, "the complete Body in microcosm," and his Remnant Concept, "in which power from the center pervades the whole." The holiness and love of a Remnant at the center of parish life is for Thornton what makes a parish a true parish.

## Internal Commitment

The third general goal to seek in an intervention is internal commitment. You want as many people as possible, at least a critical mass, to have a high level of commitment to the direction or action that was chosen. This makes it more likely that the intervention will continue to have its benefits for the parish over time and under stress. It also increases the sense of responsibility



members feel in relation to the venture.

The community's commitment to its own decisions is directly related to its health. The internal commitment of a critical mass of members to the parish's direction and culture is interdependent with a variety of other things – trust, collaboration, and the wiliness of people to accept responsibility. All that is connected with the parish' ability to stay focused on its primary task of formation.

Commitment is build upon information and choice. The social scientist Chris Argyris developed a theory<sup>11</sup> that assumes we want as much internal commitment as possible in an organization. The more people have such an ownership of the decisions made, the direction we are going in, the more it will be sustainable and survive under pressure. When there is internal commitment it's more likely that people will have energy for it and act to implement the decision.

Leaders develop such commitment not by exhortation and pressure but through attention to the decision making process. The more people get engaged with information about an issue (ideas, feelings, research), the more equipped they are to see the options available and make informed decisions. The more they are making decisions based on a free choice rather than from coercion or habit, the more the chance that they will have the commitment necessary to follow through.

Obviously it's not possible for the whole community to be involved in all the decisions any parish needs to make. The priest and/or vestry need to make both the routine decisions that keep a parish working. Leaders need to accept responsibility to act in situations of crisis when timely action is essential. On occasion leaders also will need to be the emotional circuit breakers when the community is extremely anxious. This is the legitimate case for hierarchy in any organization or community.

This isn't a case for having the whole community involved in any particular decision. It's simply to say that: to the extent people are involved, the information they are working with is valid and useful, and they have real choices before them, the likelihood of ending up with strong internal commitment is increased.

### **An Intervention Theory**

The following is largely based on the work of Chris Argyris in *Intervention Theory and Method*.

How can parish leaders achieve the commitment they want or need from others in the congregation? We know its not done by exhorting people or making them feel guilty. How can the parish as a whole, and the work it does, secure the kind of commitment that builds critical mass when needed and is sustainable over time and under pressure?

The assumption of this model is that commitment is built upon a base of valid and useful information and free choice.

The base of the model is at the bottom of the chart. The top is where you want to arrive.

<b>Internal Commitment</b>	<ul style="list-style-type: none"> <li>• The target is for as many people as possible to have a high level of commitment to the option that was chosen.</li> <li>• A high ownership and feeling of responsibility. That people are acting under the influence of internal decision rather than external forces.</li> <li>• More likely to hold over time and under stress</li> <li>• Open to re-examination (our commitment to “valid and useful information” may bring new information and new choices)</li> </ul>
<b>Free Choice</b>	<p>The task is for the parish to select the option with the highest probability of succeeding (within cost limits). The process needs to enable that choice to be:</p> <ul style="list-style-type: none"> <li>• Based on an exploration of options</li> <li>• Voluntary, not from habit or coercion</li> <li>• Proactive, not reactive</li> </ul>
<b>Valid &amp; Useful Information</b>	<ul style="list-style-type: none"> <li>• Information that can be publicly verified; that can be tested with a broad range of people; that can be openly gathered and discussed.</li> <li>• Is useful in the sense that something can be done with it to effect change</li> </ul>

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 leaders or consultant are not just trying to help the parish or group solve a particular problem or engage a specific opportunity; but are also concerned with two other matters:

- That people end up with high internal commitment to the direction, and
- That the parish 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. Parish 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.

# Process Considerations

## Your Influence

Consider whether you have the influence that will be necessary to manage the intervention. Two models that may help you are: are Intervention Roles and Circles of Influence.

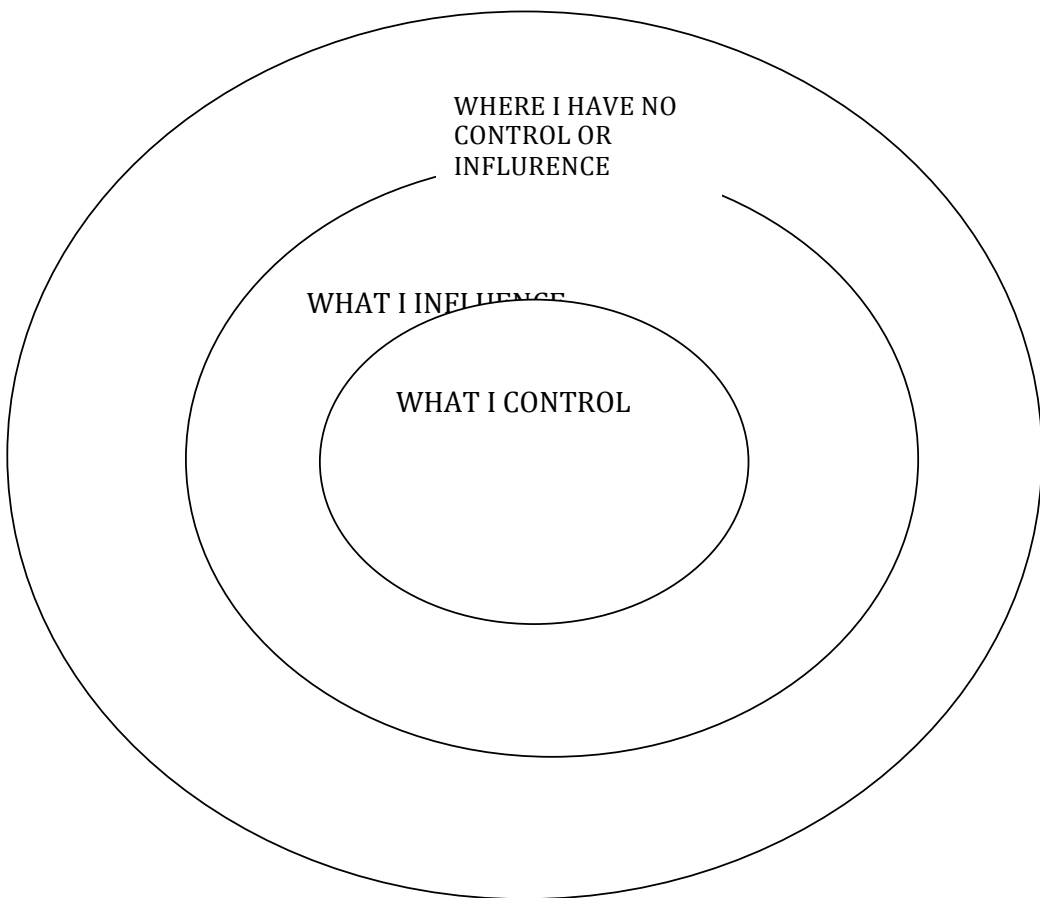
### Roles <sup>12</sup>

The parish role you are in will make intervening easier or harder. In each role the person is using change agent knowledge and methods in a process of parish improvement.

<b><i>THE ROLE</i></b>	<b><i>CHARACTERISTICS</i></b>	<b><i>BENEFITS</i></b>	<b><i>COSTS</i></b>
<p><b><u>The Rector</u></b> The Rector (or vicar, priest-in-charge) is somewhat comparable to an executive director or the manager of a department. These are all people with the primary responsibility to take action for system improvement.</p> <p><u>Parish Development Team</u> - an extension of the rector's authority; team shares responsibility for improvement effort. This would be similar when there are clergy or lay people on the parish staff who have been delegated some responsibility for system improvement.</p>	Has the legitimate authority for shaping processes, structures and climate; also for initiating and monitoring. The person is visible and accountable.	Easier to make entry into the parish system. More focused on results. Has a very defined place in the parish.	May be drawn away from the improvement effort by other demands. Can become the target of the parish's cynics and those resisting changes.
<p><b><u>Internal Consultant</u></b> A role not usually seen in parishes. In other organizations this person has a defined position within the organization that carries responsibility for consulting and training activities toward improvement. In such cases the person is not a manager with the authority to initiate OD efforts.</p>	Visible. Is accountable to several sources (the internal client, the client's "boss"). Needs contracts with others in order to function.	Is part of the parish. Can develop a highly integrated sense of how to do an CD effort in this particular parish.	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><b><u>Internal Change Agent</u></b> Any member or employee in the parish that acts for improvement on their own authority. Has no formal authorization for the effort.</p>	Role is not formally defined or authorized. May call for low visibility. May be risky.	Acting on own values. Sense of purpose.	Risk of punishment - being ostracized, loss of job or membership.

<p><b>External Consultant</b>          Not part of the parish's on-going life. Is contracted with to provide services to facilitate improvement. Generates own clients. Most commonly works alone.</p>	<p>High visibility. Temporary in the system. Has a formal contract.</p>	<p>Clear contracts. May see things the insiders fail to see. May be able to productively use dependence.</p>	<p>May be unfamiliar with the parish and it's ways - may lead to misunderstandings, lack of integration in approach.</p>
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**Circles of Influence**



You can use the circles as a worksheet. In a particular situation where are you? Do you have direct control and authority? Or is it something you can influence? Or is this a case that is

outside your range on control and influence? Obviously you want to make interventions in areas you have influence or control.

You can also use the circles to scan your relationship with the whole parish system. In each circle identify specific areas, groups, and circumstances. This may help you identify situations where you can make useful interventions.

The circles may also be used in a reflective process as follows:

- How you use the control & influence you have – how does your behavior match your values?
- What is the relationship between stress & frustration in your life and control & influence?
- When you have no/little control or influence how do you usually respond? How might you better self manage your response

## Readiness

Readiness is the parish's ability and willingness to change from some current way of doing things to a different way. An adequate level of ability and willingness are both necessary. Ability is about whether the parish has within it the competence (skills/knowledge) needed to accomplish this particular change. Willingness focuses on the degree of desire or motivation in the parish in support of the change.

A failure to accurately assess readiness can take us into change efforts that end not only in a failure around that particular project but can increase the frustration of those seeking needed change. Future possible efforts can be undercut this way.

“The process of shaping the parish is about wisdom and good judgment. Even for the wisest of leaders it's not always apparent how to facilitate the Shape without doing things in a way that jumps past the congregation's readiness.” (*Fill All Things: The Dynamics of Spirituality in the Parish Church*, Robert A Gallagher, Ascension Press, 2008, p 155)

### *Considerations in assessing readiness*

1. Adequate dissatisfaction – Is there dissatisfaction with the way things are now in relationship to the change projects field of interests? This can be direct, as in vestry members saying they find themselves bored or frustrated with the meetings. There are ways to improve meetings. Or, it may be more general, so if there are people expressing a longing for a deeper and richer parish spiritual life, one new initiative might be to begin the public offering of the Daily Office, even though no one is saying, “I feel dissatisfied because we don't have the Daily Office.” Such a statement might come from informed people of Apostolic or Progressing Sacramental Faith, but is less likely from others. Taking dissatisfaction and offering ways to address often involves professional judgment. Clergy are assumed to have more training in ways to nurture parish spiritual life.

2. Favorable stance of people – There is a person who wants this to happen and is willing to spend energy making it happen. That person has enough influence with people who would need to cooperate in order for it to happen. There are others who would most likely be

supportive in making it happen. In almost all cases this needs to include the rector. Those who would most likely be actively opposed to allow it to happen might reasonable be brought around, not offer much resistance, or wouldn't have enough influence to stop it. This element can be difficult to assess when there are key people who are fence sitters or unwilling for some reason to commit in a direction.

3. Competence for change – Do we have the skills and knowledge we need for this particular intervention? This is in at least two areas: 1) in the content area of the change effort, for example spiritual life, or communication skills and 2) in change theory and methods. Do we need an outside expert resource for the first or a change consultant to assist with the second? Those promoting the change need to have the necessary skills and knowledge. Change efforts fail when change agents move beyond their competence. This is partly a matter of self-awareness and partly one of ethics.

4. It fits - with the parish's current culture (values, ways of being and working) and sense of direction or vision

5. Resources available – there are the people, money, facilities and such needed to implement the project/change.

6. Energy and attention – The needed amount of energy is available. Those who would need to do something will be able to give attention to it. It wouldn't be in competition with other initiatives or existing efforts to such an extent that it would make it too difficult to have adequate energy and attention.

7. Formal authorization – Most of the efforts that can shape a parish only require the investment of the parish priest. That role assumes the authority to initiate efforts to improve the faithfulness and health of the parish. But there are situations requiring vestry action. It's important to stay with canons and by-laws on this. In two ways. First if it's a budget or property issue the vestry needs to act. If it's about worship, liturgy, education or spiritual life – it's the rector's decision; don't take it to the vestry for authorization. The question of formal authorization is different from that of building adequate ownership among those in the parish needed if the effort is to be successful.

A useful resource in assessing the readiness issues of competence and willingness is Situational Leadership. The "Situational Leadership" approach of Hersey, Blanchard, and Johnson suggests that what the leader needs to do is fit his or her leadership style to the competence and commitment of the person or group. This has been a very useful tool in organizations trying to empower employees and members. The idea is that if a team has a high degree of competence and commitment for their work then they can be more self-managing of the task and the relationships in the team. This approach is used in assessing overall parish readiness in *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Robert A Gallagher, Ascension Press, 2008, page 152

#### *Our blindside*

I'll mention a few places we can get ourselves in trouble around assessing the parish's readiness.

1. Optimism or the "all things are possible" stance – Actually both are helpful for those trying to move a parish to increased health. The danger is when the gift is used to excess. The stance

of optimism can override our ability to see that, in this case, the needed conditions just aren't present.

2. Arrogance - We can also get caught up in an arrogant stance toward others in the parish. That may be what's happening if we find ourselves saying something like, "If everyone would do what a good, just, smart person would do, then this could happen."

3. We are in the grip - The effort is exhausting us. Our abilities that usually work aren't working this time. We find ourselves acting in an unskilled manner, as when a right-handed person tries to write with their left hand. It looks childish, takes a long time to do, and is stressful.

### The Change Formula

$$C = D \times V \times F > R$$

**Change** equals **Dissatisfaction X Vision X First Steps** that is greater than the **Resistance**

The idea is that if you are seeking some significant, system-wide change there are several core elements that need attention.

#### We need a critical mass of the organization to:

1. Be **dissatisfied (D)** with the way things are (in relationship to the proposed change). This often doesn't come until some force from outside the organization creates a crisis for the organization.

2. To have a **vision (V)**, an image or an idea of what improvement would look like, that is grounded in the hopes and dreams of employees or members. An old saying among leaders is - "Being right is only one-quarter of the battle." It's not uncommon for leaders to have a vision of what improvements are needed. The problem is that just communicating the vision (or mission, or strategic plan) will not bring change.

3. With a clear sense of what needs to be done as **first steps (F)**. This means having a picture of what we can do differently in the short term that will move us toward that vision. Four major factors for leaders to take into account are: 1). What competencies need to be developed or strengthened for people to be able to function in the changed situation? People don't like to feel incompetent and change often creates that feeling. 2). People are often hesitant to accept and implement the change because they fear losing friends and colleagues who are in opposition. 3). Having the needed resources to make the change. 4). Beginning to create an alignment of structures, process and practices that will be in harmony with the new way.

**Resistance (R)** is likely to be present in all change efforts. The combined weight of the dissatisfaction, vision and first steps needs to be able to overcome that resistance. That means if

any of those elements (D, V, F) is “0”, the change will not be possible.

It is useful to use Chris Argyris’s intervention theory in applying the change formula. The theory suggests that the more people you get involved in diagnosing the situation, exploring options, and shaping a picture for the future, the more likely you are to develop a commitment in people that is sustainable under pressure and over time.

*Dick Beckhard and Reuben Harris described the change formula in an article. They attribute its creation to David Gleicher.*

### The Change Formula Worksheet

$$C = D \times V \times F > R$$

**Change** equals **Dissatisfaction X Vision X First Steps** that is greater than the **Resistance**

A. What is the change you want?

B. Assess

<i>To what extent is there a critical mass of employees/members:</i>	Low				High
1. That is dissatisfied with the way it is done now	1	2	3	4	5
2. That shares a vision (sense of what an improvement would be)	1	2	3	4	5
3. That is ready for the first steps	1	2	3	4	5

C. Action

Note ways of strengthen the following among a critical mass.

**1. Creating a sense of dissatisfaction** --Helping people see the gap between what is and what could be. AND/OR To become aware of, and give voice to, their dissatisfaction. AND/OR To become aware of the crisis that pushes the change upon the organization.



**2. Developing a shared vision.** – A process for developing a shared vision, image of the improved situation.

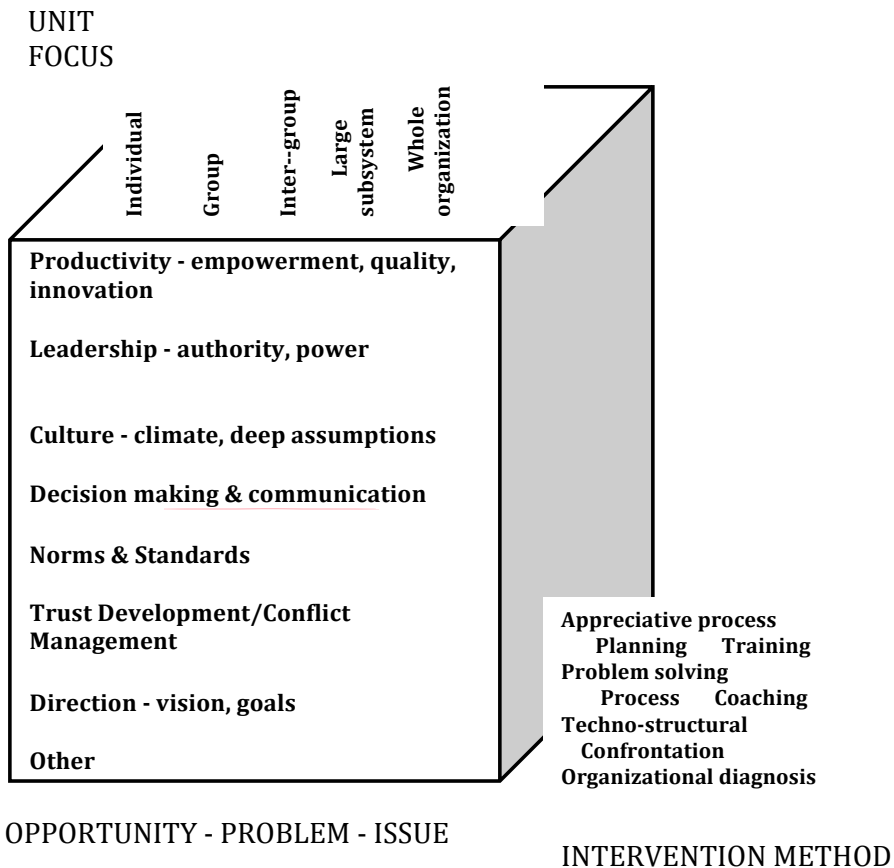
**3. A clear sense of what needs to be done as first steps.**

- What we can do differently in the short term that will move us toward that vision.
  
- What competencies need to be developed or strengthened for people to be able to function in the changed situation
  
- Bring along people who are friends and colleagues with one another
  
- The resources needed to make the change.
  
- Beginning to create an alignment of structures, process and practices that will be in harmony with the new way.
  
- Other

## 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

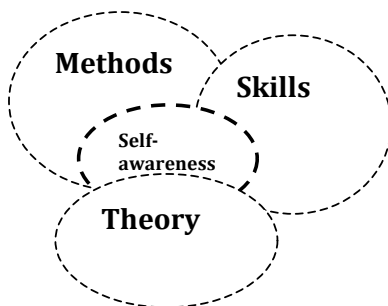
- All interventions will come within some form of the process of planned change (e.g., diagnosis, planning, implementation, and evaluation).
- There are a number of standard interventions in the field. Here are a few examples:

<b>With Individuals</b>	<ul style="list-style-type: none"> <li>- T-group</li> <li>- Training &amp; education to increase skills and knowledge related to the person's assigned task, relationships, decision-making, etc.</li> <li>- Coaching, counseling</li> <li>- Career/Life Planning</li> </ul>
<b>With Groups</b>	<ul style="list-style-type: none"> <li>- Team building</li> <li>- Process consultation</li> <li>- Self-managing teams</li> <li>- Role negotiation</li> <li>- Action planning</li> <li>- Skill training</li> </ul>
<b>Inter-group</b>	<ul style="list-style-type: none"> <li>- Mirroring</li> <li>- Process consultation</li> <li>- Conflict management</li> </ul>
<b>With the Total Organization</b>	<ul style="list-style-type: none"> <li>- Visioning; Strategic planning</li> <li>- Appreciative Inquiry</li> <li>- Quality of Work Life programs</li> <li>- Physical settings</li> <li>- Training</li> <li>- Parallel structures</li> <li>- Techo-structural</li> <li>- Employee/member involvement</li> <li>- Organizational learning</li> </ul>

### 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 & Self-management | 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.  |

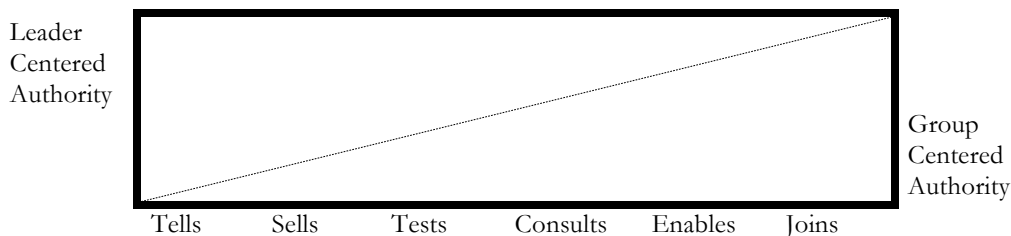


Making effective interventions is a complex process involving organizational purposes and needs, the organization's culture, and the competencies and values of leaders and consultants. The practitioner's awareness of the intervention possibilities is dependent on the depth and broadness of her or his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

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## Your Stance

### LEADERSHIP STYLES



- Tells - Leader makes decision and announces it.
- Sells - Leader has made decision but wants to have others buy it.
- Tests - Leader has made tentative decision, wants to test it with others to get response.
- Consults - Leader wants group ideas. 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*

## Loving Critics

*Pity the leader caught between unloving critics and uncritical lovers.*

John W. Gardner

John W. Gardner<sup>13</sup> spoke about how the society needed people who would be loving-critics of the institutions in which they worked. You can apply that to your parish church.

In a commencement address, “Uncritical Lovers – Unloving Critics,” at Cornell University on June 1, 1968 he spoke about the choices we have in how we engage our institutions.



In his address he offered a fictional account of how scholars in the 23rd century would look upon our age.

"... They pointed out that twentieth century institutions were caught in savage crossfire between uncritical lovers and unloving critics. On the one side, those who loved their institutions tended to smother them in an embrace of death, loving their rigidities more than their promise, shielding them from life-giving criticism. On the other side, there arose a breed of critics without love, skilled in demolition but untutored in the arts by which human institutions are nurtured and strengthened and made to flourish. Between the two, the institutions perished.

The twenty third century scholars understood that where human institutions were concerned, love without criticism brings stagnation, and criticism without love brings destruction. And they emphasized that the swifter the pace of change, the more lovingly men had to care for and criticize their institutions to keep them intact through the turbulent passages.

In short, men must be discriminating appraisers of their society, knowing coolly and precisely what it is about the society that thwarts or limits them and therefore needs modification. And so must they be discriminating protectors of their institutions, preserving those features that nourish and strengthen them and make them more free. To fit themselves for such tasks, they must be sufficiently serious to study their institutions, sufficiently dedicated to become expert in the art of modifying them."

### **How you think about your role in relation to change; Mental model re interventions**

See as:

-Long-term effort to turn things around

-A continuous improvement process to maintain or improve health of parish  
-Dozens of interventions/projects each year

Long range thinking about development

**Take the time** - it is long range (3 years, then 2 more, then 3 more - see it as 7 -8 year process)

**Stay at it** -- all the time --

- 1) series of planned interventions
- 2) increased "here & now" intervention capacity

### **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

**Keep your "head above water"** -- continue training; use consultant; read deeply; attend to own spiritual life; have the key models & theory in your head

**Deal with yourself** -- What you do to block yourself? What competencies need developing?  
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## Self awareness and self management

Bob reads the Q&A columns in the newspaper that deals with social behavior. It's what for many years was the domain of "Dear Abby." Someone's annoyed by the behavior of his or her spouse, children, parent's friends -- and they want to know what to do. In one such column the questions ranged from -- dealing with a relative who is a professional musician and insists on playing the piano throughout parties at his home at a noise level undercutting conversation; to a "wasn't I right" question about disinviting a visit by an ill friend out of the fear of catching it the illness and "isn't she wrong in being upset with me" to coping with a boss that has a strong body odor later in the day.<sup>14</sup>

### **Use of self**

In leading a parish the single most consistent element is "you." You bring "you" into each situation. You bring "you" into each new parish you attend or are the priest of.

A one-on-one intervention used by many consultants is with the leader who's going on about how "this is the same problem I faced in the last parish \_\_\_\_\_ (people won't change, try something new, and so on)." The consistent factor in each case is "you."

The phrase “use of self” is shorthand for understanding and managing your skills, emotions and moods, and personality preference. It’s become common in many organizations to speak of emotional intelligence.

Intelligence – our ability to take information of various sorts (intellectual, emotional) and see patterns that allow us to organize our perceptions about the world and ourselves and take appropriate action. Ability to diagnosis and navigate.

### Emotions

Michael Kinsley, of Politico, wrote of George W. Bush “Even as he’s bombing Baghdad back to the Stone Age, he’s very much in touch with his feelings.”<sup>15</sup> Speaker of the House John Boehner came in for some jabs over his crying when emotionally moved. The Democrats seemed unduly pleased at the opportunity to elbow Republicans over the expression of emotions.

Being in touch with your feelings seems to come in for the same derision as Kumbaya and both can cross political lines. That stance is often used by those wanting to avoid responsibility for their own emotions, moods and the actions that flow from them.

Awareness of emotions and moods allows us to think about them, to get perspective on them, but that also may not happen. We can be aware in a manner that is largely self-oriented.

There are several quite good models for emotional and social intelligence.<sup>16</sup> Karl Albrecht, an organization development practitioner, sees five areas competence for social intelligence: 1) Situational radar—the capacity to read situations and act effectively based on that; 2) Presence—a sense of confidence; 3) Authenticity—behaving so you and others see yourself as honest; 4) Clarity—being able to express ideas and feelings in a way that persuades others; and 5) Empathy—the ability to create a sense of connection with others. See below for the Emotional Competence Framework from The Consortium for Research on Emotional Intelligence in Organizations

## Emotional Intelligence

### The Emotional Competence Framework

The Consortium for Research on Emotional Intelligence in Organizations  
EI Framework ( [www.eiconsortium.org](http://www.eiconsortium.org) )

**SOURCES:** This generic competence framework distills findings from: *MOSAIC competencies for professional and administrative occupations* (U.S. Office of Personnel Management); Spencer and Spencer, *Competence at Work*; and top performance and leadership competence studies published in Richard H. Rosier (ed.), *The Competency Model Handbook, Volumes One and Two* (Boston : Linkage, 1994 and 1995), especially those from Cigna, Sprint, American Express, Sandoz Pharmaceuticals; Wisconsin Power and Light; and Blue Cross and Blue Shield of Maryland. Much of the material that follows comes from *Working with Emotional Intelligence* by Daniel Goleman (Bantam, 1998).



## Personal Competence

### SELF - AWARENESS

**Emotional awareness:** Recognizing one's emotions and their effects. People with this competence:

- \* Know which emotions they are feeling and why
- \* Realize the links between their feelings and what they think, do, and say
- \* Recognize how their feelings affect their performance
- \* Have a guiding awareness of their values and goals

**Accurate self-assessment:** Knowing one's strengths and limits. People with this competence are:

- \* Aware of their strengths and weaknesses
- \* Reflective, learning from experience
- \* Open to candid feedback, new perspectives, continuous learning, and self-development
- \* Able to show a sense of humor and perspective about themselves

**Self-confidence:** Sureness about one's self-worth and capabilities. People with this competence:

- \* Present themselves with self-assurance; have "presence"
- \* Can voice views that are unpopular and go out on a limb for what is right
- \* Are decisive, able to make sound decisions despite uncertainties and pressures

### SELF - REGULATION

**Self-control:** Managing disruptive emotions and impulses. People with this competence:

- \* Manage their impulsive feelings and distressing emotions well
- \* Stay composed, positive, and unflappable even in trying moments
- \* Think clearly and stay focused under pressure

**Trustworthiness:** Maintaining standards of honesty and integrity. People with this competence:

- \* Act ethically and are above reproach
- \* Build trust through their reliability and authenticity
- \* Admit their own mistakes and confront unethical actions in others
- \* Take tough, principled stands even if they are unpopular

**Conscientiousness:** Taking responsibility for personal performance. People with this competence:

- \* Meet commitments and keep promises
- \* Hold themselves accountable for meeting their objectives
- \* Are organized and careful in their work

**Adaptability:** Flexibility in handling change. People with this competence:

- \* Smoothly handle multiple demands, shifting priorities, and rapid change
- \* Adapt their responses and tactics to fit fluid circumstances
- \* Are flexible in how they see events

**Innovativeness:** Being comfortable with and open to novel ideas and new information. People with this competence:

- \* Seek out fresh ideas from a wide variety of sources
- \* Entertain original solutions to problems
- \* Generate new ideas
- \* Take fresh perspectives and risks in their thinking

#### SELF - MOTIVATION

**Achievement drive:** Striving to improve or meet a standard of excellence. People with this competence:

- \* Are results-oriented, with a high drive to meet their objectives and standards
- \* Set challenging goals and take calculated risks
- \* Pursue information to reduce uncertainty and find ways to do better
- \* Learn how to improve their performance

**Commitment:** Aligning with the goals of the group or organization. People with this competence:

- \* Readily make personal or group sacrifices to meet a larger organizational goal
- \* Find a sense of purpose in the larger mission
- \* Use the group's core values in making decisions and clarifying choices
- \* Actively seek out opportunities to fulfill the group's mission

**Initiative:** Readiness to act on opportunities. People with this competence:

- \* Are ready to seize opportunities
- \* Pursue goals beyond what's required or expected of them
- \* Cut through red tape and bend the rules when necessary to get the job done
- \* Mobilize others through unusual, enterprising efforts

**Optimism:** Persistence in pursuing goals despite obstacles and setbacks. People with this competence:

- \* Persist in seeking goals despite obstacles and setbacks
- \* Operate from hope of success rather than fear of failure
- \* See setbacks as due to manageable circumstance rather than a personal flaw

#### Social Competency

##### SOCIAL AWARENESS

**Empathy:** Sensing others' feelings and perspective, and taking an active interest in their concerns. People with this competence:

- \* Are attentive to emotional cues and listen well
- \* Show sensitivity and understand others' perspectives
- \* Help out based on understanding other people's needs and feelings

**Service orientation:** Anticipating, recognizing, and meeting customers' needs. People with this competence:

- \* Understand customers' needs and match them to services or products
- \* Seek ways to increase customers' satisfaction and loyalty
- \* Gladly offer appropriate assistance
- \* Grasp a customer's perspective, acting as a trusted advisor

**Developing others:** Sensing what others need in order to develop, and bolstering their abilities. People with this competence:

- \* Acknowledge and reward people's strengths, accomplishments, and development
- \* Offer useful feedback and identify people's needs for development
- \* Mentor, give timely coaching, and offer assignments that challenge and grow a person's skills.

**Leveraging diversity:** Cultivating opportunities through diverse people. People with this competence:

- \* Respect and relate well to people from varied backgrounds
- \* Understand diverse worldviews and are sensitive to group differences
- \* See diversity as opportunity, creating an environment where diverse people can thrive
- \* Challenge bias and intolerance

**Political awareness:** Reading a group's emotional currents and power relationships. People with this competence:

- \* Accurately read key power relationships
- \* Detect crucial social networks
- \* Understand the forces that shape views and actions of clients, customers, or competitors
- \* Accurately read situations and organizational and external realities

## SOCIAL SKILLS

**Influence:** Wielding effective tactics for persuasion. People with this competence:

- \* Are skilled at persuasion
- \* Fine-tune presentations to appeal to the listener
- \* Use complex strategies like indirect influence to build consensus and support
- \* Orchestrate dramatic events to effectively make a point

**Communication:** Sending clear and convincing messages. People with this competence:

- \* Are effective in give-and-take, registering emotional cues in attuning their message
- \* Deal with difficult issues straightforwardly
- \* Listen well, seek mutual understanding, and welcome sharing of information fully
- \* Foster open communication and stay receptive to bad news as well as good

**Leadership:** Inspiring and guiding groups and people. People with this competence:

- \* Articulate and arouse enthusiasm for a shared vision and mission
- \* Step forward to lead as needed, regardless of position
- \* Guide the performance of others while holding them accountable

- \* Lead by example

***Change catalyst:*** Initiating or managing change. People with this competence:

- \* Recognize the need for change and remove barriers
- \* Challenge the status quo to acknowledge the need for change
- \* Champion the change and enlist others in its pursuit
- \* Model the change expected of others

***Conflict management:*** Negotiating and resolving disagreements. People with this competence:

- \* Handle difficult people and tense situations with diplomacy and tact
- \* Spot potential conflict, bring disagreements into the open, and help deescalate
- \* Encourage debate and open discussion
- \* Orchestrate win-win solutions

***Building bonds:*** Nurturing instrumental relationships. People with this competence:

- \* Cultivate and maintain extensive informal networks
- \* Seek out relationships that are mutually beneficial
- \* Build rapport and keep others in the loop
- \* Make and maintain personal friendships among work associates

***Collaboration and cooperation:*** Working with others toward shared goals. People with this competence:

- \* Balance a focus on task with attention to relationships
- \* Collaborate, sharing plans, information, and resources
- \* Promote a friendly, cooperative climate
- \* Spot and nurture opportunities for collaboration

***Team capabilities:*** Creating group synergy in pursuing collective goals. People with this competence:

- \* Model team qualities like respect, helpfulness, and cooperation
- \* Draw all members into active and enthusiastic participation
- \* Build team identity, esprit de corps, and commitment
- \* Protect the group and its reputation; share credit

*Used with permission given on website. The source of the material was the web site for the Consortium for Research on Emotional Intelligence in Organizations [www.eiconsortium.org](http://www.eiconsortium.org)*

## Be Safe Out There

This section has not been worked on – The section will be on selecting what may easily be done vs. picking the most difficult thing to do.

If you can't do the easy things something else is going on  
-they are angry with you for many other reasons  
-this is a deeply troubled parish

Add  
material from Rules of Thumb

Safety and Risk material

## Phony Interventions

This section has not been worked on

There are actions taken by parish leaders that can only be called phony interventions. The person may not be aware of it, may be operating on a set of false assumptions, but what they are planning to do will have little impact.

Here's a few examples.

AI when used to avoid seeing problems and making hard choices

Self Differentiated leadership – when used as a cover for anger. Used to create distance.

Present a model – The tendency to make it an intellectual exercise.

Bishop's – three years to turn a parish around

Bishop's – a three-year appointment as a priest in charge.









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<sup>1</sup> A classic definition of organization development comes from Richard Beckhard's 1969 *Organization Development: Strategies and Models*: "Organization Development is an effort (1) planned, (2) organization-wide, and (3) managed from the top, to (4) increase organization effectiveness and health through (5) planned interventions in the organizations 'processes,' using behavioral-science knowledge. A more recent definition is "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. *Organization Development and Change* by Cummings and Worley. A note on language: While on occasion the field is called "organizational development" that's not it's proper name and frequently that form refers to programs more like what is seen in a masters of non-profit management.

<sup>2</sup> Book of Common Prayer, p. 855

<sup>3</sup> Diana Butler Bass, *Christianity for the Rest of Us*, Harper One, 2006, p. 42

<sup>4</sup> *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Robert A. Gallagher, Ascension Press, 2008, Chapter One.

<sup>5</sup> *Organization Development* French and Bell pp.312 – 319

<sup>6</sup> "Moving Your Church through Conflict" a PDF available from Alban Institute, <http://www.alban.org/conversation.aspx?id=1226>;  
[http://www.uucr.org/LEADERSHIP\\_FOLDER/LevelsOfConflict.htm](http://www.uucr.org/LEADERSHIP_FOLDER/LevelsOfConflict.htm);  
<http://www.teal.org.uk/conflict/resolution.htm>

<sup>7</sup> *Christianity for the Rest of Us*, Harper One, 2006

<sup>8</sup> *Connected: The Surprising Power of Our Social Networks and How They Shape Our Lives*, Nicholas Christakis and James Fowler, Little, Brown and Company, 2009. p.30

<sup>9</sup> *The Tipping Point: How Little Things Can Make a Big Difference*, Malcolm Gladwell, Little Brown, 2000.

<sup>10</sup> A foundations course is a substantial educational and training program that is repeated over the years and is used to incorporate people into the parish and the spirituality of the Episcopal Church. A foundations course is a resource for setting loose an energy in individuals and the parish that can stir new thinking and behavior and may help move some people into a more Apostolic expression of faith and practice. There needs to be enough substance to it that it has the potential of taking participants to a new place in their spiritual life. Some parishes have nine or ten sessions. Others have modules that extend over three years. It's a resource for:

-People exploring faith and spiritual life

- 
- People joining the parish and/or the Episcopal Church
  - Existing members who have not engaged these issues in recent years
  - Adults preparing for baptism, confirmation, reception, or reaffirmation
  - New comers who want to connect to the parish and meet other people

<sup>11</sup> *Intervention Theory and Method*, Chris Argyris.

<sup>12</sup> This draws on "Roles from Which OD Efforts Can Be Started Robert A. Gallagher", 1999

<sup>13</sup> John W. Gardner, 1912-2002, U.S. secretary of health, education, and welfare (1965-68), Head of the National Urban Coalition. Founded and served as chair of Common Cause, (1970 - 1977), Professor of public service at Stanford University (1989 to 1996) When younger he taught psychology at Connecticut and Mt. Holyoke colleges and serving as an intelligence officer with the U.S. Marine Corps in World War II, he joined the Carnegie Corp. of New York in 1946, becoming its vice president in 1949 and its president in 1955.

<sup>14</sup> The answers went along these lines – It's his home and his party, don't hurt his feelings over the music; maybe you were a bit quick or abrupt in the disinviting, might want to call her and say you were so afraid of getting ill yourself that you insensitive; schedule meetings in the morning All in "Social Q's", New York Times, 12/26/10

<sup>15</sup> "Bush on Bush," New York Times Book Review, 12/19/10. Kinsley did go on to credit the President for his efforts to prevent anti-Muslim prejudice and the fight against AIDS in Africa.

<sup>16</sup> Useful resources include: The Consortium for Research on Emotional Intelligence in Organizations has the "Emotional Competence Framework" in its links ("Download reports") [www.eiconsortium.org](http://www.eiconsortium.org) Daniel Goleman's books *Primal Leadership: Learning to Lead with Emotional Intelligence* and *Social Intelligence: The New Science of Human Relationships*