Shaping the Parish

Developmental Initiative Report

Initiative Title: Exploring congregational options

Level: A

# YOUR NAME

E-MAIL

DESCRIPTION

This initiative may fit your situation if the parish no longer has the ability to continue in the ministry structure it has been accustom to. A reasonable target might be to find a new alignment that stabilizes the situation for the next few years. The immediate goal of the initiative might be to begin the exploration of options and to map out an initial design for a process over the coming months.

When congregations are static or in decline (see Organizational Life Cycle attached) they may face choices about whether to change parish structures and programs or to attempt to increase in size. This Congregational Options diagram (attached) offers the standard options available in such a situation. Congregational leaders can use the diagram to explore the choices before them and add, revise and drop options.

These conversations can be emotionally difficult with complex dynamics. It may be useful to make use of an external consultant. The parish team (from Shaping the Parish) will need to exercise patient and persistent leadership if the parish is to face into the situation.

**In exploring options the parish may want to consider:**

1. What are our strengths? How might they serve us in pursuing selected options?

2. What new strengths do we need to develop?

3. How do we usually undermine ourselves; shoot ourselves in the foot? How might that impact this?

4. Are we prepared to act on some options more than others? Which ones? What can we do to expand our options – deal with anxieties, get information, etc.?

5. What is the level of internal commitment among leaders to the option we select? How to build commitment and ability to collaborate around the option – (develop inclusion/participation/acceptance of people and parish culture; increase participation in information flow; make decisions based on free choice and looking at alternatives rather than habit or pressure).

**One possible process to use is:**

1. Meetings with the vestry/leadership to 1) assess the parish’s situation using the Life Cycle and another type of assessment. Put on newsprint in front of the group. Is there an acknowledgement that the parish is static or in decline? Explore, discuss

2. Present the Congregational Options handout. Place the options in front of the group on newsprint. Present the options. Use the attached “Congregational Options for Testing” worksheet.

Have people come forward and place check marks next to the 2 options they believe make the most sense for this parish. Or you might have people rank options.

If the parish is under the direct jurisdiction of the bishop, has the bishop placed limitations on the options that may be considered? If so there may be a need to have a representative of the bishop’s office at the meeting to deal with the emotional dynamics and hear what leaders think.

3. Create a process to explore the selected options.

Other things to look at:

* It’s likely the diocese will need to be involved in this process. Consider talking with the appropriate person in the bishop’s office early on.
* The most common option people seem drawn to is membership growth. This is often a “phone choice.” Unless the parish is still in relatively strong financial shape, there is rarely the time needed to engage in all the work around developing health and working on growth. In some cases it may be possible to settle on an option that stabilizes the situation for now and allows the time needed for health and growth work.
* It’s likely that the parish will require an external consultant to help manage the complexity of this intervention.
* The team should expect to consult one of the program trainers more than might be the case with other developmental initiatives of the program.
* All areas of emotional intelligence are likely to be called upon in this effort, especially, self-management, political awareness, use of influence, leadership, trust development and conflict management.

Participant’s additions & changes to the description

If you are revising the above in some manner, note that here. Offer a rationale for the change. Changes may not be so extreme as to change the basic thrust of the project description above --

Have you carefully reviewed the above description?

Yes No [ Note: You must have done this review for the DI to be accepted]

ACTION PLANNING

1. What are you planning to do? What is the action plan? First steps. How you will monitor and adjust along the way

2. Theoretical base and strategic assumptions for the project

a. Theoretical Base (connect related theory to the project and the particulars of your parish) -

b. Strategic Assumptions (In your parish as it is now – what were you assuming would happen allowing the project to move forward? A strategic assumption has enough significance that if it turns out to not be true, the project will fail) -

A. Results: What are the initial results are you seeking? Note: we are assuming you are working from the basic DI description. This section is more a brief statement of overall objectives expressed in a way that integrates the description with the particularities of your parish.

Do the same regarding longer-term development goals? Relationship to the parish’s overall health? Relationship to the primary task of a parish church? -

B. Reflection

1. Strategic (pp 12 – 13 *Intervention Considerations*)

*The Developmental Initiatives are by their nature strategic or at least they are in that arena. These elements may help you consider related factors*

* Long term, developmental, likely to have a ripple effect -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not likely |  |  |  | Very Likely |
| 1 | 2 | 3 | 4 | 5 |

Comment:

* Related to the primary task of a parish church (form people in faith, renewal in baptismal identity and purpose, facilitating the movement between renewal and apostolate) -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not related |  |  |  | Very related |
| 1 | 2 | 3 | 4 | 5 |

Comment:

* Can anticipate adequate resources of time, money, and energy devoted to the initiative? -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Anticipate inadequate resources |  |  |  | Anticipate very adequate resources |
| 1 | 2 | 3 | 4 | 5 |

Comment:

2. Demand System (pp13 – 14 *Intervention Considerations*)

*What is really developmental is usually also not urgent. It may be important but it is not urgent. How do you establish a new demand system that serves what’s important?*

* How will you cope with all the other demands, expectations and pressures of the parish an your life as you try to focus on the DI? -
* How will you work to create a new “demand system” that will make this initiative part of the parish’s routine business? -

3. Critical Mass (pp. 23 – 29 *Intervention Considerations*)

*In general critical mass theories are 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. In relationship to a specific Developmental Initiative there may be two considerations.*

* What will you do to create enough “weight” to support this particular DI? Will there be enough physical and emotional energy to get the work accomplished? This has to do with the social and political process by which you help the parish move forward. (For example, if working on Group Functioning – can you anticipate enough initial support from members of the groups you want to involved?) - Describe it. -

* In most DIs there is a second consideration. Will enough of a critical mass develop in relationship to the *desired results* of the initiative? (For example, if working on Group Functioning – How will you develop a critical mass of competence and commitment in the groups going through the process? What will you do so people become more skilled?) -

* Is there an “emotional inversion” in the parish, either broadly in the parish in general or in regard to this particular DI? (See bottom p. 26 *Intervention Considerations*) -

4. Internal Commitment (pp. 29 – 31 *Intervention Considerations*)

*This is often interrelated with critical mass considerations. 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. The assumption is that commitment is built upon a base of valid and useful information and free choice. 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.*

How will you help people engage an adequate amount of valid and useful information? --

How will you design the process so that people have an adequate degree of free choice vs. acting from habit or emotional pressure)? --

5. Your influence (pp. 31 - 34 *Intervention Considerations*; take note of “OD Roles” and “Circles of Influence”)

Assess your influence in relationship to this specific DI? -

6. Readiness (pp. 34 - 38 *Intervention Considerations)*

* Adequate dissatisfaction – Is there dissatisfaction with the way things are in relationship to the DIs field of interest? -
* Favorable stance of people – Is there a person, or more than one person, who wants this to happen and is willing to spend energy making it happen? A person with enough influence with people who would need to cooperate in order for it to happen? -
* Competence for change – Did you have the skills and knowledge needed for this particular intervention? -
* How does it fit with the parish’s current culture? -
* Resources available – Are there adequate resources of people, money, facilities and such to implement the project/change? Any concerns? -
* Energy and attention – What are the likely problems around having the needed amount of energy? -
* 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. Is formal authorization needed from some group within the parish or diocese? -

7. Intervention Choices (pp. 39 - 41 *Intervention Considerations)*

*We 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?*

* What is the unit focus of the intervention? Is there a need to engage at several levels? Rationale for this -
* What is the opportunity, problem, or issue to address? Not simply the title of the DI but in relation to those listed on p 39 -
* What is the intervention method? (for example those listed on p. 39)-

8. Your stance (pp. 42 – 43 *Intervention Considerations)*

* What leadership style do you see yourself taking in doing the intervention (p 42)? How does that match with your preferred leadership style? Do you find yourself needing a broader range of styles? -
* What is your usual stance in relationship to the parish and its leaders (loving critic, unloving critic, uncritical lover)? How might that impact the intervention? -

RESULTS & LEARNINGS

A. Results: What happened? What are the initial results you’re seeing? Also look at it in terms of the project goal/objectives. Is there anything to report in regard to longer-term development goals? Any initial sense about sustainability over the long-term and under pressure? Relationship to the parish’s overall health? Relationship to the primary task of a parish church? Experience regarding your strategic assumptions -

B. Theoretical base and strategic assumptions for the project

a. Theoretical Base (connect related theory to the project and the particulars of your parish) -

*Mark one*

-As expected (in action planning) -

-Differed from what we expected -

If different, please comment -

b. Strategic Assumptions -rate and comment in relationship to strategic assumptions as noted in action planning -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not on target |  |  |  | Very much on target |
| 1 | 2 | 3 | 4 | 5 |

Comment -

C. Reflection

*Make comments connecting what happened with the area of reflection.*

1. Strategic (pp 12 – 13 *Intervention Considerations*)

*The Developmental Initiatives are by their nature strategic or at least they are in that arena. These elements may help you consider related factors*

* Long term, developmental, likely to have a ripple effect; rate and describe -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| None |  |  |  | Strong effect |
| 1 | 2 | 3 | 4 | 5 |

* Related to the primary task of a parish church (form people in faith, renewal in baptismal identity and purpose, facilitating the movement between renewal and apostolate); rate and describe -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No noticeable relationship |  |  |  | Strong relationship |
| 1 | 2 | 3 | 4 | 5 |

* Were adequate resources of time, money, and energy devoted to the initiative?; rate and describe -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not adequate |  |  |  | Very adequate |
| 1 | 2 | 3 | 4 | 5 |

2. Demand System (pp13 – 14 *Intervention Considerations*)

*What is really developmental is usually also not urgent. It may be important but it is not urgent. How do you establish a new demand system that serves what’s important?*

* How did you cope with all the other demands, expectations and pressures of the parish an your life as you tried to focus on the DI? -
* How have you worked to create a new “demand system” that will make this initiative part of the parish’s routine business? -

3. Critical Mass (pp. 23 – 29 *Intervention Considerations*)

*In general critical mass theories are 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. In relationship to a specific Developmental Initiative there may be two considerations.*

* Was there enough “weight” to support this particular DI? Enough energy to get the work

accomplished? This has to do with the social and political process by which you help the parish move forward. (For example, if working on Group Functioning – was there enough initial support from members of the groups you wanted involved?) - Rate and Describe -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not enough |  |  |  | Enough weight |
| 1 | 2 | 3 | 4 | 5 |

* In most DIs there is another consideration. Is enough of a critical mass developing in relationship to the desired results of the initiative? Rate and Describe (For example, if working on Group Functioning – Is a critical mass of competence and commitment beginning to develop in the groups going through the process? Are people becoming more skilled?) -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not enough |  |  |  | Enough |
| 1 | 2 | 3 | 4 | 5 |

* Was there an “emotional inversion” in the parish, either broadly in the parish in general or in regard to this particular DI? (See bottom p. 26 *Intervention Considerations*) -

Yes No unsure

Comment -

4. Internal Commitment (pp. 29 – 31 *Intervention Considerations*)

*This is often interrelated with critical mass considerations. 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. The assumption is that commitment is built upon a base of valid and useful information and free choice. 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.*

a. What did you do to build internal commitment as seen is this approach? -

b. Assess

Enough internal commitment for what was needed in this case -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not enough |  |  |  | Enough |
| 1 | 2 | 3 | 4 | 5 |

Base of free choice and valid and useful information to build the internal commitment -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not enough |  |  |  | Enough |
| 1 | 2 | 3 | 4 | 5 |

Comment -

5. Your influence (pp. 31 - 34 *Intervention Considerations*; take note of “OD Roles” and “Circles of Influence”)

Was your influence adequate to manage the intervention?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

6. Readiness (pp. 34 - 38 *Intervention Considerations)*

* Adequate dissatisfaction – Was there dissatisfaction with the way things were in relationship to the change projects field of interests? -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* Favorable stance of people – Was there a person, or more, who wants this to happen and is willing to spend energy making it happen? A person with enough influence with people who would need to cooperate in order for it to happen? -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* Competence for change – Did we have the skills and knowledge we need for this particular intervention? -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* It fit with the parish’s current culture -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* Resources available – the people, money, facilities and such needed to implement the project/change. -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* Energy and attention – The needed amount of energy was available -

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Not at all |  |  |  | Adequate |
| 1 | 2 | 3 | 4 | 5 |

Comment -

* 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. Was there the needed authorization? -

Yes No Uncertain

Comment -

7. Intervention Choices (pp. 39 - 41 *Intervention Considerations)*

*We 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?*

* What was the unit focus of the intervention? Did that end up being appropriate? Was there (or is there) a need to engage at several levels of units? -
* What was the opportunity, problem, or issue to address? Not simply the title of the DI but in relation to those listed on p 39 -
* What was the intervention method? (for example those listed on p. 39)-

8. Your stance (pp. 42 – 43 *Intervention Considerations)*

* What leadership style did you take in doing the intervention (p 42)? Was that effective? Did you find yourself needing a broader range of styles? -
* What is your usual stance in relationship to the parish and its leaders (loving critic, unloving critic, uncritical lover)? How did that effect the intervention? -

C. Learnings

1. About change theory and methods -

2. About spiritual practices in shaping the parish -

3. About emotional & social intelligence in shaping the parish -

4. About yourself as a person and leader

D. Next Steps

1. Thoughts on long-term goals -

2. Next steps in the short term -

3. Comments -

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###### ORGANIZATIONAL LIFE CYCLE

# MATURITY

**Static Maturity**

* Stuck in status quo; on a plateau
* Planning seen as way to control future
* Fussing over small things
* Not responding to new opportunities
* Losing sense of vision & purpose; identity is focused on the past
* If not addressed at the stage – the system will in time decline

Improvement Process might involve redefining

Fussing over small

things

**Stable, Healthy Maturity**

* Stability provides base for change, new ways, risk. Allows more choices about how to shape organizational life
* A balance between stability and change
* Regular and reliable processes to reengage issues of formation -- “listening process.”

Fussing over small

things

# DECLINE

• Denial, avoiding, stress, nostalgic climate

• Low or fragmented energy

• “Fear-blame” cycle increasing

* Rigidity, numbness, defensiveness
* All “fear-blame” cycle
* No internal leadership able to facilitate development

DISINTEGRATION



* Vision for and development of identity, purpose, mission, culture and related programs/activities
* New people – staff, members
* Increasing level of competence & commitment
* A “fit” between vision, program, resources, culture, etc. A sense of integration.
* Establishing relationships with external “publics” or constituencies that have a stake in the organization

### CREATION

• The “Idea”, the “Dream”

• Founder(s)

• Initial funding

##### DEATH

##### DEATH

Developmental action plans and interventions need to fit where the system is in the organizational life cycle. Seek the maximum degree of inclusion, open information, free choice from options, and internal commitment that can be attained at that stage (the further into decline the less this is possible). Organizations tend to have “reasons” to not engage the formation issues: In first formation – getting caught up in building projects or growth and not also spiritual formation. In Stable, Healthy Maturity – “we don’t need it.” In Static Maturity – embarrassment and denial. In Decline – denial, getting caught in trying to blame someone. As the system moves from Static to Decline to Disintegration there is more need for external assistance – consultants, the “central office.”

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Congregational Options

When congregations are static or in decline (see Organizational Life Cycle) they may face choices about whether to “downsize” parish structures and programs or to attempt to increase in size. This diagram offers the standard options available in such a situation. Congregational leaders can use the diagram to explore the choices before them and add, revise and drop options.

Situation Basic Choice Some Options

**Close**

# 

Cut costs: staff size/time; program

Parish life is static or in decline and that condition is related to a lack of “fit” between parish costs for program, staff, buildings, etc. and income.

**Merge**

Cluster Ministry

**Move location**

Yoke with another parish

Learn to Live a Full Christian Life as a Smaller Parish

Local Ordination

Revitalization, Renewal. Development

**Grow in Membership**

Incorporation of New Members

Lapsed Ministry

Reach New Populations Reach New populations

Defining and Marketing the Parish

Increase Pledging

**Increase Financial Giving/Income**

Increase Endowment

Joint Venture

***In exploring options the parish may want to consider:***

1. What are our strengths? How might they serve us in pursuing selected options?

2. What new strengths do we need to develop?

3. How do we usually undermine ourselves; shoot ourselves in the foot? How might that impact this?

4. Are we prepared to act on some options more than others? Which ones? What can we do to expand our options – deal with anxieties, get information, etc.?

5. What is the level of internal commitment among leaders to the option we select? How to build commitment and ability to collaborate around the option – (develop inclusion/participation/acceptance of people and parish culture; increase participation in information flow; make decisions based on free choice and looking at alternatives rather than habit or pressure).

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Congregational Options for Testing

Place a check mark next to the two options you believe offer the most reasonable paths forward. [Or follow other instructions as provided by the consultant or facilitator.] As the parish will not have the energy or time to fully explore all these options it’s necessary to narrow down that exploration. Which options do we want to look at in more depth?

Record your responses on the newsprint in front of the group.

**1. Close**

**2. Merge**

**3. Move location**

**4. Grow in membership**

**5. Increase financial Giving/Income**

*Learn to live a full Christian life as a smaller parish by:*

**6. Cutting costs**

**7. Cluster Ministry**

**8. Yoking with another parish**

**9. Local ordination**

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