

Sept 2000

cdi

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To: <jdenman@episwtn.org>; <DioLex@aol.com>; <jannholtz@mindspring.com>;
 <ESan39305@aol.com>; <ssloan@saint-lukes.com>; <StFran@mindspring.com>;
 <dukec@mindspring.com>; <jamie@campmcdowell.com>; <benchassc@charleston.net>;
 <cdi@maine.rr.com>; <tunneyee@juno.com>
Sent: Tuesday, September 26, 2000 11:50 AM
Subject: Preparations for Phase I

September 26, 2000

To: LTI Staff

From: Bill Yon

Re: Preparation for Phase I

We currently have 17 confirmed registrations (after one cancellation), and Ceci Duke is in touch with three additional possibilities. Steve Walton has had to drop off staff. That leaves Liz, Jamie, and Ceci as participant/apprentices. I think all staff will be getting to camp by 6:30 or so on Saturday, except Bob Gallagher, who will be flying in to Bham at 9 pm, and renting a car to get to camp.

Maybe we can tend to some details Saturday evening, and jump into substantive planning Sunday morning. I am somewhat concerned that we will only have Sunday to get our act together as a staff, ready to begin Monday morning -- and there will be some disruptions by the arrival of participants during the afternoon and evening. I may also have to make a run to the airport to pick up those who are flying in Sunday afternoon.

We will have to do at least the following:

1. Divide two groups and assign lead staff and apprentices. We will also need to make room assignments. My thought is to have the two groups divided into two lodges, and the staff in a third.

2. Outline schedule for the week. I do not have a complete set of daily schedules from last year,

10/1/00

but I would think plenary theory sessions might include the following:

- Lab Theory of Learning - EIAG
- Member Functions - Maintenance, Task, and Individual
- JoHari Window - Self-disclosure and Feedback
- Life Cycle of Groups - Forming, Storming, Norming, Performing.

Other possibilities might include:

- The Interpersonal Gap
- Leadership Styles: Tells, Sells, Tests, Consults, Joins
- NASA Exercise: Consensus Decision-making

Please bring any other materials that you think would be useful. We can copy and distribute as we go along. Also, be prepared to take some responsibility for presentations in some of the above areas.

To BOB, especially, please bring stuff that you have found useful in HR training. We have mostly been re-warming materials from long ago.

I will bring notebooks and dividers for each participant and staff. I will bring copies of most of the materials above for distribution during the week.

I hope we can compile a good notebook during the week, but I don't think there is much value in passing out a lot of stuff without explanation or application.

Theological Reflection. We have made a commitment to make theological reflection an integral part of this experience. At last year's Phase II the last period each evening was devoted to this, and there were dissatisfactions about the low energy at this time of day. Shall we try first thing in the morning? Any experiential exercises anybody can come up with will be welcome.

A reminder: My plan is to be with you Saturday afternoon, and to stay until things get underway on Monday morning. Then return Thursday afternoon and stay until the end on Friday. I am not unaware of the hazards of this kind of coming and going in disrupting leadership patterns in the staff. I trust us to be able to face it and deal with it.

I look forward to seeing you all on Oct. 7.

LTI Development

JAN 01

A training system serving participants and organizations from – the non-profit and for profit sector as well as religious systems.

Episcopal Church based

- 75% of trainers are Episcopal Church members
- Use of BCP (or other authorized) worship; norms of “common prayer”
- Staff leads & participates in daily worship (usually MP and Compline) and one HE during the week); participants are invited; spiritual guidance is available
- Special attention to developing LTI as a resource for the Episcopal Church

– Image: like an Episcopal hospital or social service agency; open to serve all; resources of faith as a base for staff and available to participants. Therefore, no trapping people into prayer or religious discussion but an openness to participants sharing insight and making connections to their own religious or philosophical tradition.

Trainers:

- 75% from Episcopal Church
- Most trainers maintain a relationship with other professional associations and training systems – NTL, OD Network, CDI Trainers, etc
- At least 50% have significant training in Organization Development (from NTL, CDI, MATC, etc.) This is to help keep the Three Phase training connected to practical use in organizations and competency based.

Training Scope (in first three years)

- Three Phase training each year (possible a second round each year on the calendar year)
- Consultation Skills Training (Bob would offer, one or two trainers with a good bit of consulting experience would assist to “learn” the lab; LTI would pay a fee to Bob based on number of participants, trainers for whom the lab is new would receive expenses)
- Introduction to Type
- Other: _____

A Special Relationship: An agreement between LTI and CDI Trainers

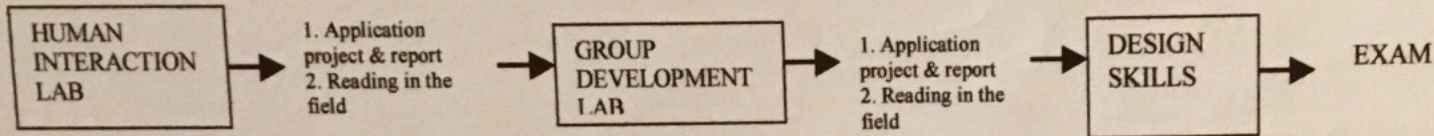
LTI will refer people to CDI and will make note of the relationship in its advertising. CDI will do the same. LTI will not offer training in congregational development or OD. CDI Trainers will not offer training like three phase training or consultation skills.

LTI -- OVERVIEW OF THREE PHASE TRAINING

Phase One

Phase Two

Phase Three



CERTIFICATE PROGRAM: Certificates of completion are awarded to participants who:

1. Complete all three lab experiences
2. Complete the development, implementation and reporting of projects in-between phases
3. Complete a take-home exam on related theory; demonstrate an adequate degree of knowledge on the exam

Certificates are not recognition of competence but of program completion

All participants are assumed to be in the certificate program.

Fees will be stacked toward the front end. For example – if the fee for participation in the whole certificate program is \$1500; that might be broken down into \$600.00 before Phase One. \$700.00 before Phase Two, and \$200.00 before Phase Three.

The coordinator of a particular lab may admit someone who has the necessary prerequisites. That person may either be folded into the certificate program or accepted on the basis of participating in one lab.

The HI Lab would be open to participants not in the certificate program. Possibly at a slightly higher fee rate -- \$600.00; that could be applied to the Certificate Program if the person decide to join.

HUMAN INTERACTION LAB (Phase One)

Primary Group Method – T- Groups

Skill Training – EIAG, Feedback Skills, Listening Skills

Theory – Johari Window; Interpersonal Gap; Awareness Wheel; ICA (with Firo B – re. Interpersonal awareness and group development);

Patterns (blame, placate, explain, etc); Emotions; Triangulation

Project Development

GROUP DEVELOPMENT LAB (Phase Two)

Primary Group Method – task groups

Skill Training -- increased ability to use theory/models in EIAG; increased ability to lead EAIG; use of a variety of methods for EIAG (back-home application possibilities); team facilitation skills (up-front skills, use of space, use of newsprint and recording, etc.); ability to use Type theory to understand “self” in a group and team dynamics

Theory – Task/Relationship; Group Development Theories (Norm/Form; Trust Development, other); Type theory; decision theory

Project Development

DESIGN SKILLS – for education, programs, meetings (Phase Three)

Primary Group Method – task groups

Skill Training – increased ability to lead EIAG; design skills – Diagnosis (data gathering and analysis), Planning (Purpose and designing), Implementation (action); Evaluation

Theory – learning theory and styles, intervention theory

Project Development

Project Reports from the first two phases will be sent to trainers to read and comment on.

The exam will be a brief (3 or 4 questions) that ask the participant to apply their learnings and theory to cases.

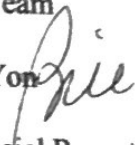
Trainers of a lab must use and cover the standard methods, theories, etc (as above). La training staffs may design to fit particular time frames, participants, etc. and to approach the standard material in different and improved ways.

Leadership Training Institute

William A. Yon, Coordinator
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Phone 205/678-9455
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February 2, 2001

To: LTI Team
From: Bill Yon 
Re: Financial Report

Greetings:

Since in this seat-of-the-pants organization, I have no Board of Directors to report to, I report to you. Enclosed is an accounting of receipts and disbursements related to LTI 2000/01.

We had \$1,273.51 left over from last year, and wound up this year with \$353.90. To that I have added \$539.15 which was left over in my account from The Next Hurrah in 1998 (this with the concurrence of Bob Gallagher and Loren Mead). That gives us \$893.05 to get started on the next round.

We managed to come out in the black with a small enrollment this year, because each of you contributed your time, and some of you picked up some or all of your travel expenses, demonstrating that you are a high competence - high commitment group: a bunch of WINNERS! (I think Jamie also managed to shave some off our Camp McDowell bill, in spite of our miscalculation of lodging costs.)

For the last three years, I have been running these funds through my personal checking account, which is probably not the best business practice, but it saved the cost (\$7.00 per month) of a separate checking account. My account pays about 2% interest on balances which I figure offset some of my long distance phone, on-line time, etc., which I did not try to account for.

If we manage to get some up-front funding, no doubt it will be a good idea to set up a more formal system for finances.

I have not gotten any feedback from you on my response to the plans you laid out during Phase II. Where do we go from here? You have dates for the next two years at Camp McDowell (for two phases or three?) What else needs to be decided? How?

I look forward to hearing from you.

LEADERSHIP TRAINING INSTITUTE
Budget and Financial Report
October, 2000 - January, 2001

	Budget	@	Actual	
Balance forward from 1999 LTI	1,273.51			1,273.51
Receipts				
18 Institute Fees	4,500.00	250.00	4,500.00	
1 Institute Fees - Phase I	125.00	125.00	125.00	
4 Less refunds	(750.00)	(250.00)	(1,000.00)	
Lodging (Robinson - Phase I)			200.00	
Lodging (Lucas - Phase II)			110.00	
Total Net Receipts	3,875.00		3,935.00	
Amount to be accounted for	5,148.51			5,208.51
Expenses				
Materials & Office				
Brochure printing			111.73	
Postage			40.00	
Notebooks, dividers, nametags			107.97	
Envelopes			7.52	
Ink cartridge			26.09	
	300.00			293.31
Phase I				
Staff Travel				
Ann Holtz	150.00		201.90	
Bob Gallagher	300.00		300.00	
Kay Collier-Slone	180.00		180.00	
Ceci Duke	100.00			
Rebecca DeBow	40.00			
Bill Yon	100.00		107.25	
	870.00			789.15
Staff Lodging				
6 6 nites @ \$22	800.00			
7 18 meals @ 5.50	700.00			
	1,500.00			1,872.00
Phase II				
Staff Travel				
Ann Holtz	150.00		221.65	
Bob Gallagher	300.00		300.00	
Kay Collier-Slone	180.00		0.00	
Bill Yon	100.00		52.00	
	730.00			573.65
Staff Lodging				
6 6 nites @ \$22	800.00			
7 18 meals @ 5.50	700.00			
	1,500.00		1,326.50	
Total Expenses	4,900.00		4,854.61	
Balance Remaining	248.51			353.90
Transferred from The Next Hurrah				539.15
Cash on hand 2/1/01				893.05

odct

From: Robert A. Gallagher <odct@maine.rr.com>
To: <Nandjedi@aol.com>; <rebeccadebow@hotmail.com>; <DioLex@aol.com>;
 <jannholtz@mindspring.com>; <jdenman@episwtn.org>; <ssloan@saint-lukes.com>
Sent: Thursday, April 05, 2001 5:00 PM
Subject: LTI - diverse population & theological reflection

Could we each offer our own thinking around the issues we face as LTI? I'll offer my read on several issues in the next few e-mail messages.

Bob

From Bill -

> "How religious diversity (will) be approached" is one of the knotty
 > questions. My way of framing it would be "Can the effort to incorporate
 > theological reflection be maintained with a more diverse population?"

I think that one way of doing it would be to make sure that we followed norms such as:

1. Time will be provided before or after sessions for BCP (or other approved texts) worship. Open to all, not expected.
2. As a sign of how central the worship is -- the staff takes responsibility for leadership
3. Offer within the program something like "Reflection of theology/spirituality/values". The format would need to provide something broad enough for all participants (e.g., how does your tradition approach human development?) or tracks that allow a specifically Christian (Anglican) discussion and other groups for other traditions. Possible a mixed group. Let people self-select
4. I'd prefer a norm that within the T-Group people were asked to not impose their worship/prayer on the group. Making space for reflection in the group runs the risk of drawing them away from the "here and now" but might be done as in #3 above.

A related issue is helping diocesan leaders (and others) see LTI as grounded in the church and serving the church. I think that in addition to the above we could accomplish that by:

1. Having a norm that at least 75% of active LTI trainers are active Episcopalians
2. Openly stating the relationship
3. Interpreting our openness as:
 - an expression of the best of Anglican ethos (open, world affirming, etc.)
 - that working on human relations, interpersonal relations, etc. without being open to a broad base of participants is both bad training and bad Anglicanism. Given the areas being worked on diversity can only help clergy and lay leaders who do attend become more competent.
 - that lay people will have a very difficult time getting secular employers to cover the cost of training if we don't have norms such as the

4/19/01

I think Bill is correct in the assumption that the lack of response to his earlier message was largely due to all the personal stuff some of us have been coping with. My guess is that the other part of the silence has to do with clarity about who will be making the decisions. It is a leadership styles issues

(Tells, sells, etc -- see the attachment).

Bob

cdi

From: <LorenMead@aol.com>
To: <Nandjedi@aol.com>
Sent: Friday, April 20, 2001 11:23 AM
Subject: Training History

Willie: I got it. By God, I got it. The rain in Spain stays mainly in the plain! Loren

A BIASED MEMO ON CLERGY TRAINING

Background: This memo is a follow-up to a meeting at Kanuga in November 1998. It is "biased" because it represents what I remember and conversations I've been involved in or know about -- I suspect there is much others have done that I don't know about. It is also biased in that I believe "training" as described herein is an essential tool for clergy leadership, and that it has been abandoned to our loss. If anybody knows stuff that ought to be included in this story -- please let me know, and I'll try to add it on. On the other hand, I'm not interested in getting an accurate research paper, I'm interested in our finding a way to plug the gap left in our system by our neglect of this essential tool for leadership growth and effectiveness

An Expurgated History: In the early 50's, as the Episcopal Church was trying to jump start an educational push for the church (the eventual result was the "Seabury Series" for church schools, and a re-thought strategy of congregational life involving "family services" and adult education), a group of leaders (the ones I remember hearing about were people like Ted and Cynthia Wedel, Reuel Howe, John Heuss, David Hunter) became aware of a new kind of adult leadership education being pioneered at Bethel, ME, by the National Training Laboratories. This was "laboratory training," as it came to be known, which was invented by Kurt Lewin and a number of his associates (-- one of whom, Rolf Lynton, became my consultant in Project Test Pattern and the Alban Institute). The unique character of laboratory training was its experiential nature. One was not taught "about" a subject, one was engaged with others in personally exploring an area, generating skill and knowledge from involvement with it. For the individual, it shifted the focus from information to engagement; from individual gathering of facts to a community experience in learning.

With the aid of a major donation by an Episcopal layman, secured by a young clergyman, George Peabody, the education staff of the church tested the idea with some church leaders, then developed a national program in which all active Episcopal clergy were invited to a 2-week "Church and Group Life

4/22/01

Laboratory." It is my impression that about half the clergy eventually participated before the money ran out. As the money ran out, regional coalitions were formed to try to continue the training. The best known to me were these coalitions: The New England Training Institute, Consultant Trainers of the Southwest, The Alabama Training Network, the Mid-Atlantic Training Committee. Early on, other groups and denominations mounted some laboratories, and the National Council of Churches did so at Green Lake, Wisconsin and other places.

The focus of the training became "three-phase" training, in which experiential education was provided around three major areas: 1) education in how individuals relate to others, how to learn to communicate with other persons (classical method, the "T Group" experience discovered at Bethel); 2) education in how groups grow and develop in accomplishing tasks and planning for the future; and 3) education in how to design formats in which persons could learn more effectively.

What were the outcomes? Here, obviously, I am biased. Let me note the things I believe to have been among the major outcomes:

1) This training helped turn out a remarkable generation of church leaders in the 60's and 70's -- most of the innovations, educational programs, or institutions were spawned by people who had learned the language and skills of "planned change," "organizational development," etc.

2) This training turned hundreds of congregations into more effective educational communities, with ordinary lay leaders having learned skills of group leadership, data gathering, meeting analysis. There are dozens of ordinary activities in church groups that were born in the lab movement: the habit of taking an evaluation at the end of a meeting; the process of using small groups and skill at gathering information in large groups; the group development of agendas; the sharing of responsibility for behavior in groups -- the list is endless, but the point is that these behaviors have become part of the culture of the congregation.

3) Reduction of sharp polarizations. At the time of the lab movement, the big fights in the church had to do with theological positions related to "churchmanship." Fights were frequent and damaging. As lab training spread, "low" churchmen and "high" churchmen discovered better ability to listen to one another and manage their differences. One of the most significant changes in the life of the church of those years was the shift connected with "Liturgical renewal."

Baptismal practices were vastly changed; practices and vestments related to the eucharist went through tremendous changes; parish worship practices shifted in many ways.

That could not have happened without the growing openness of the extremes of churchmanship to communication with those of opposing views.

4) The dissemination of new skills throughout the church and beyond. The skills of educational design, interpersonal competence, and organizational planning provided a grounding for new skills of systems analysis and various forms of management. Church leaders and leaders of the secular world influenced each other and learned from each other in changing religious institutions and secular organizations in many remarkable ways. A number of the "guru's" of management science were influenced by the lab movement in the churches as well as at Bethel.

5) The lab movement provided the skills and designs for "Education for Ministry," one of the most widely used models of adult education in the Church. It also was the spawning ground of "The Alabama Plan," of stewardship. It also provided the skilled persons who became the first consultants in Project Test Pattern, who were also the first in the Episcopal church to begin action research into the way congregations actually work.

6) Lab "alumni" provided an infrastructure of skilled people -- clergy and lay -- who proved to be very adaptable in other leadership tasks -- they were widely used as consultants in the change of pastors, they were drawn on as consultants for national and diocesan evangelism efforts, they helped staff diocesan planning programs, they formed the core of those who came to be used to help manage conflicts, they helped as volunteer staff for diocesan conventions, conferences, and organization.

Why did such a good thing end? By the late 80's the regional networks for training were pretty much gone. Partly, it was money -- from the beginning labs had to struggle to pay for themselves.

It started on the church's usual "hand-out" style -- trying to do things on the cheap and pretending there were no costs (staff persons "gave" their time, hiding the cost in salaries

paid through other budgets), actual costs were provided by "special grants or gifts," etc.

More central, perhaps, was the fact that labs were victimized by rumor and bad feeling their

proponents did not adequately answer (there were participants in labs who suffered

psychological breakdowns in the tense atmosphere of some of the training; there were

other participants who, in the same tense situations, suffered breakdowns in moral

behavior; those opposed to the wholistic nature of the training branded it "just a bunch

of touchy-feely" meetings; the world of academia tended to stigmatize training as "not

real education, just emotional stuff." The regional networks had no "clout" in decision-

making groups. Opposition was loud and support was not effective.

Is there, or should there be Laboratory Training for the Church of the 21st century?

I did not plan to get involved in this question. In 1997, two of us who had enjoyed our

connection to the world of training (Bill Yon and I) remembered how many of us had

been shaped by those experiences and wondered if any of the trainers we had known

might be interested in having a reunion to share old stories and enjoy the company

of one another. We located a place (Kanuga Conferences) and time (November 1998)

and sent out a round robin invitation to people whose addresses we had, asking them

if they'd be interested in coming and if they'd pass the letter on to others whose addresses

they might have. We hoped a dozen or two might come away for -- basically -- a party and

a reunion of old friends. We were astonished when about 50 accepted the invitation, even

though they had to pay their way. We gave the meeting the humorous name, "The Next

Hurrah!" The humor in the title was not that we planned for anything afterwards, but just

that we didn't want to let on that we knew most of us were, shall we say, age challenged!

What happened that led to this memo?

At the Kanuga meeting we were surprised first at the turnout. People paid to come from both

coasts and many places in-between. Secondly we were surprised at the intensity of feeling

about the importance training had been in the church they had known.
Before we knew

what was happening, and contrary to the design we had planned, different people and

groups moved from nostalgia to bemoaning a loss to hoping and dreaming that there might

be a way to make training available to the generation of new clergy who simply had not been

exposed to an important set of tools and experiences. The group made no decisions, but

there emerged a consensus that several initiatives would be taken -- depending on what

people wanted to do where they were. We also agreed to try to stay in touch. Specific

initiatives mentioned:

a) Remnants of the Alabama network said they wanted to see if, in collaboration with others in their geographic area, they could mount a "leadership training institute" of the 3 phase training

b) Several people talked about trying to develop a "Clergy Training Institute," perhaps on the model of the second summer at seminary

c) others wondered if this kind of training might not be included in some of the newer clergy training efforts (CLP, Cornerstone, Parish Development Institute at Seabury Western and also at General)

d) People tried to stay in touch with each other, but lots of things fell through the cracks. Those whose efforts did not pan out had nowhere to go for help.

Some efforts I know about:

1. Probably the most successful effort has been made in Alabama, Mississippi, and Tennessee,

Staff and participants have been recruited for three LTI's, even though the program has been

operated on less than half a shoe-string. Funding remains a critical problem. One of the bishops involved has suggested that sending persons to this training might be best prior to seminary rather than after. (Bill Yon can give other details)

2. An initiative was begun to build a coalition between the Yale School of Management and

YDS/Berkeley for a summer institute for seminarians. This came to nothing, partly because of

a change of leadership at the seminaries. (Billie Alban can give other details)

3. I've been engaged in desultory correspondence with a number of people, with "training"

often a sub-theme of our letters (let me be clear -- most of my work in these several years

has been about quite other things -- with "training" a worrisome side issue I just cannot

make go away). I've corresponded with or had conversations with Jim Fenhagen, Hank Myers, George Peabody, Billie Alban, Bill Yon, Martha

Horne, Bill Craddock, Anne Holtz, Charles Kiblinger, Jim Lemler,
Alan Blanchard -- and a couple of dozen others.

Some hunches I've developed:

1. Training probably is not going to happen if there is not a place/
institution that centers
it (like, but not the same as MATC, who did it in the Mid-Atlantic area).
2. In the long run, it must be ecumenical, but you have to start where
you can, and I see
that in the Episcopal system.
3. It won't happen unless we find a way to partner with seminaries and
dioceses, focussing
on newly-formed clergy.
4. It's got to have some funding to undergird the infrastructure, but
the training has to
pay for itself.
5. Something has to happen in the next 5 years if we are not going to run
out of the
trained leaders of the past. If we can replenish them elsewhere, there's
no hurry.
6. Academic institutions (including seminaries) and denominational
structures do not
and will not have this high in their priorities for the foreseeable future
-- they may well
see this as an important adjunct activity, but it will not be central
(which is why # 1 above)
7. There is a need to expose current bishops, faculty, and deans to this
genre of
education.

Finally, friends:

There are educational formats developing in the churches now (the Parish
Development

Institutes, the "Pilot Project for New Clergy," CLP and Cornerstone,
CREDO) that have
the same target audience, but none of them yet sees "training" as the
critical ingredient

I see in the development of a new generation of clergy leaders. There
are possible
allies (all of the above, the Alban Institute, the Church Pension Fund)
who can potentially
work with these efforts.

I am haunted by words Bill Yon said: "Since we let the training effort
evaporate, we have
done important other things. Primarily we have focussed in helping
churchpeople get
clearer about and more committed to their understanding of the faith.
The result, however, is

when you get stronger commitment to positions and stop helping people communicate with and learn from each other -- the result is predictable. Stronger and stronger polarization and more intensity of conflict." That's the picture I get of the church now. Training might have a profound impact on that.

I think we need to consider a new "Last Hurrah." But this one should be -- from the beginning -- focussed on "what do we need to do to make it happen."

What I don't know? Who should be there (ecumenical? regional?)
How do we pay for it?
Is anybody serious about this? Or is it just me?

Loren B. Mead; 2701 36th Street, N.W., Washington, D.C., 20007.
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1
Subj: LTI planning

Date: 4/20/01

To: didex@aol.com, jannholtz@mindspring.com
To: ESan36906@aol.com, dukec@mindspring.com
To: jamie@campmcdowell.com, cdi@maine.rr.com
To: turneyse@juno.com, rebeccadebow@hotmail.com
To: selcan@saint-lukes.com, jdenman@episwtn.org
To: gray11@mindspring.com, LWorkman@sewanee.edu
CC: LorenMead@aol.com

April 2001

Dear Bob and Ann:

I will pick up Rebecca and we will be at camp by 11:30 Tuesday, expecting to have two hours to meet with the two of you.

Susan has a meeting at 2:00, so will not be coming. I got her input, and will report back to her. Jamie can't make it, but I expect to see her later in the week. I have talked at length with Kay, and she is OK about our sorting things out.

Bob liked the "agenda" I outlined. Here is an amended and updated version.

1. There seems to be agreement to stick to two residential phases for the next go-round. My concerns about increased time and money commitments were compounded by design issues and a short time-line. I do think attention needs to be given to Phase I design to see that we deliver what we can on group development training.
 2. With your support and concurrence, Kay is prepared to tackle combined responsibilities as "dean" (recruiter and convener of staff), promotion coordinator (brochure and distribution), and "registrar" (receive registrations and communicate with registrants). She may want to explore with Jamie the possibility of registrations being sent directly to camp - with regular updates sent to Kay.
 3. Having talked with Ann about staff fees, I have figured that we could offer \$200 per day to one senior staff per 10-12 participants for a total participant cost of \$900 or so. That's an increase of about \$200 from last year, but still cheap by any other standard. I think it's worth a shot.
 4. We need to decide if Bob will offer a Consultation Skills section for LTI "graduates." If so, figure cost and do write-up for brochure. Will it be in conjunction with Phase I or II or both?
 5. We need to list prospects for senior staff and co-trainers for Kay to follow-up.
 6. We need to decide if "apprentice trainers" will be invited. If so, I suggest it be on a private invitation basis - not listed in brochure. Somebody who was involved last year needs to think through (and write up) design implications. We would need a list of those to be invited.
 7. Norms re non-Episcopal participation. Bob offers the following guidelines which we need to review and confirm
 1. Time will be provided before or after sessions for BCP (or other approved texts) worship. Open to all, not expected.
 2. As a sign of how central the worship is - the staff takes responsibility for leadership
 3. Offer within the program something like "Reflection of theology/spirituality/values". The format would need to provide something broad enough for all participants (e.g., how does your tradition approach human development?) or tracks that allow a specifically Christian (Anglican) discussion and other groups for other traditions. Possible a mixed group. Let people self-select
 4. I'd prefer a norm that within the T-Group people were asked to not impose their worship/prayer on the group. Making space for reflection in the group runs the risk of drawing them away from the "here and now" but might be done as in #3 above.
- A related issue is helping diocesan leaders (and others) see LTI as grounded in the church and serving the church. I think that in addition to the above we could accomplish that by:
1. Having a norm that at least 75% of active LTI trainers are active Episcopalians

2 Openly stating the relationship

3. Interpreting our openness as:

- an expression of the best of Anglican ethos (open, world affirming, etc.)
- that working on human relations, interpersonal relations, etc. without being open to a broad base of participants is both bad training and bad Anglicanism. Given the areas being worked on diversity can only help clergy and lay leaders who do attend become more competent.
- that lay people will have a very difficult time getting secular employers to cover the cost of training if we don't have norms such as the above.

8. We need to begin a review and projection of our "market" and outline a promotional plan. At this point I don't think listing "sponsoring" dioceses and agencies has much value or makes much sense. At the same time, I would like to see us organize a push NOW for funding from dioceses in 2002.

9. Finally, Loren Mead continues to plow the ground with a view to getting some institutional support and funding. I am forwarding his memo just received. He's still working on it (and thinking about who to send it to) - in case anybody wants to respond. Loren is tenacious - and is on a "drop in for a chat" basis with Alan Blanchard whose Pension Fund has an extra billion dollars of internet start-up profits burning holes in its pockets, trying to find a way to do good for the Church. So hang on, folks, the best may be yet to come.

Look forward to seeing you Tuesday.

Bill

April 2001

previous participants in quotes)

Alabama (13) - Bishop has indicated interest in encouraging participation pre-seminary and for diaconal candidates (26). Has named a couple of seminarians he would like to see participate. 2-3 people interested last year who didn't make it.

Atlanta (12) - Ceci's life is changing. New bishop (seminary prof). Don't know about Gray Temple's or Caroline Westerhoff's continued influence. Mixed review by recent LTI participants.

East Tenn (10) - ?

Washington (10) - Kay has interested their new bishop. Diocese can't pay this time.

Mississippi (4) - Pat is ready to retire from LTI. New bishop. Don't know his interest.

West Tenn (9) - New bishop. Julie doesn't think he is interested, but Kay knows him and thinks he may be. *Mixed review* by recent participants.

Louisiana - Daryl Canfill has circulated brochures last two years, but no response.

MD (4) - Bob will advertise. Maybe write article for CDI folks: "Why LTI?"

MS (1) - Tom Gossen has advertised, but no response. Maybe write "What I learned in LTI re stewardship training."

MO - Liz Workman has advertised, but no response. Maybe write piece.

ND - "Conference of Diocesan Executives" - Maybe Jeanette Brown will circularize and promote.

Diocesan Program Staff Types - Send brochures. Maybe Claire Cowden will write something.

Bishops - Maybe Henry Parsley will talk with bishops (especially new bishops in southeast).

Sendin draft

MAXIMIZE

YOUR CONGREGATIONAL
LEADERSHIP POTENTIAL!

Human Interaction Lab

May 6-10, 2002

Camp McDowell, Alabama

This lab will focus on interpersonal communication and awareness of self in a group. Through a variety of *experiential* activities, participants will look at what goes on in the life of a group and learn more about the effect of their own participation.

The aim is to increase skills in the leadership functions, which maintain and enhance the life of a group and help it in accomplishing its tasks.

The Human Interaction Lab is the required prerequisite training for most other LTI events in group development, design skills and consultation skills.

For more information about this truly gratifying experience, call

Janet Ann Holtz, Registrar

865-534-2441

jannaholtz@mindspring.com



**LEADERSHIP
TRAINING
INSTITUTE**

Sept 02

odct

From: "Robert A. Gallagher" <odct@downeast.net>
To: "Rebecca DeBow" <rebeccadebow@hotmail.com>; <tunneyee@juno.com>; <diolox@aol.com>; <dukec@mindspring.com>; <jannholtz@mindspring.com>; <lworkman@sewanee.edu>
Sent: Monday, September 16, 2002 9:12 AM
Subject: Re: LTI Meeting

Looks like we should plan on meeting Wednesday. That gets the largest number of people involved. How about we assume it will October 9 Wednesday 3 - 8:30 or so.

If people need rooms for the night please contact Ann Holtz so she can tie it in with the lab registration & rooms work with the camp.

Ann - For this to work we need to stay at the camp for dinner. Will you let them know?

Kay & Liz W - where are you on this? Can you stretch your schedules a bit to get there? If that is impossible - can you say something about your participation? As I see it we need each of us to be clear about how many labs we are willing to serve on, be willing to pick up some of the administrative and developmental work of LTI. It might be a help if you say something about each of the meeting objectives below. Also to indicate that if you are agreeable with this meeting making decisions for LTI. It would be best if you could both make the meeting - might even be fun.

Here are some of the meeting objectives that I'm aware of:

1. To establish a "formal" structure for LTI.

That may also just be an interim structure for this developmental phase but we do need to create a leadership/roles set up that we all own. What we have now has been OK but it rose up out whoever was on a lab staff together just taking responsibility (and authority) and moving on. Time for something that we can all acknowledge as "ours".

LTI leadership needs to be separated from trainer status. There is no reason why management/leadership/administrative functions need to fall to a senior trainer. Liz T, Rebecca, Ceci - I think you all need to come prepared to play more of these roles as we move forward.

2. Confirm trainer status and roles

Discuss how Co-trainers (Rebecca, Ceci, Liz T) might take a next step.

Review the list of people that are in process. Also what our agreement with them is.

Consider a quick expansion of Sr. Trainers (possibly inviting some from Betsy Greenman's group in the NW, Hal White, Bill Thomas from NTL, others??). This is both an issue related to filling staff slots but more importantly related to our ability to seek developmental funding.

Anything realistic to do about trainers development (T of T)

3. Decide on seeking developmental funding

Truth is I have no significant experience, interest or set of contacts related to funding. Do any of you? Liz W. - I thought I heard you saying something about Lilly contacts - is that right or just my imagination?

4. Confirm training 2003-04 schedule, locations, fees, etc. Trainers sign up for staffing slots. **Bring your calendars**

9/16/02

5. Review LTI finances

What is the picture?

How much to use to split among Sr. Trainers serving labs up through Jan 03. How much for other purposes?
What purposes?

6. Lab participant recruitment

What are the opportunities?

How to we market LTI?

7. Is this doable? Do we want to invest the time & energy?

8. Other? What am I missing?

Bob

— Original Message —

From: Rebecca DeBow

To: odct@downeast.net ; tunneyee@juno.com ; diolex@aol.com ; dukec@mindspring.com ; jannholtz@mindspring.com ; lworkman@sewanee.edu

Sent: Friday, September 13, 2002 7:19 AM

Subject: Re: LTI Meeting - Saturday October 5

I can meet on Wednesday, Oct. 9 or in January. Just let me know. Rebecca

>From: "Robert A. Gallagher"

>To: "Liz Tunney" , , , , ,

>Subject: Re: LTI Meeting - Saturday October 5

>Date: Thu, 12 Sep 2002 09:25:50 -0400

>

>If I have the count right those who can meet are -- me, Ann, Rebecca and Liz

>T.; not able to attend are Ceci, Liz W. and Kay.

>

>Two thoughts:

>1. I don't think those numbers will allow us to accomplish what needs

>deciding and doing. I suggest we drop the idea of the Saturday meeting.

>2. Any chance of us all meeting later in the week? What if our Wednesday

>"off" time at the labs was given over to a meeting? If both labs end up

>going that would mean that me, Ann, Ceci and Liz T were all available.

>Rebecca could you come out to the camp in the late afternoon and stay

>through dinner into the early evening? Kay and Liz W. -- could you come to

>the camp for that period of time?

>

>The only other options I see are:

>1. Continue as we have been (that one's not workable for me)

>2. Try to meet in January around the labs scheduled at that time.

Sept 02

odct

From: "Robert A. Gallagher" <odct@downeast.net>
To: "Liz Tunney" <tunneyee@juno.com>; "Rebecca DeBow" <rebeccadebow@hotmail.com>; "Ann Holtz" <jannholtz@mindspring.com>; "Ceci Duke" <dukec@mindspring.com>
Cc: "Liz Workman" <LWorkman@sewanee.edu>; "Kay Collier-Stone" <diolex@aol.com>
Sent: Tuesday, September 24, 2002 11:11 AM
Subject: LTI - assumptions about the next couple of weeks

Ann, Ceci, Rebecca and Liz T. -

From late afternoon on Monday until I see you at LTI -- I'll be out of touch (mostly, Melissa will check messages for me a couple of times).

So, I thought I'd check assumptions:

1. We are on to meet Wednesday October 9 at the camp from 3 - 8:30 p.m. or so. Liz W and Kay can not be with us. Any chance one of you could have a phone call with Liz W and someone else with Kay (or the reverse - if Liz and Kay could call someone). We really need to have an idea of what they see as a realistic level of participation - as trainers and as "co-owners" of LTI. If I get a chance I will send them a message, and copy you, to set up that conversation.

2. If you need overnight accommodations at the camp for the 9th -- let Ann know.

3. I do not assume that we are doing an LTI business meeting prior to the Group Dev. lab

4. Liz T -- I can pick you up at the airport if you want (or are you getting your own car?) If you want a pick up -- let me know when. If we do that I'll look for you in the baggage claim area.

4. With the HI Lab canceled (moved to December in Mississippi?)
 -- Ceci are you going to co-train with Ann in Mississippi?
 -- Ann, Ceci (Rebecca?) -- do you want to co-train on the Gp Dev Lab? The design involves spending a good bit of time in two groups for the first 2 + days. They will be given tasks to accomplish and invited to use EIAG, give & receive feedback, etc. to learn about how they function in a task group, group dynamics, etc. (If one or more of you joined the training team I might try having them in T-Groups for the first day and then transition to the task groups.). The second part of the lab will be mostly skill training in group facilitation skills. EIAG and feedback will continue. During the second part the groups will change - may use some triads, some smaller groups, etc. MBTI will be used in relationship to teams. As the design is mine your role would mostly be to help participants in the learning process (e.g., facilitate EIAG & feedback, help them clarify learning goals, reinforce earlier theory they may have from HI Lab, etc.). In my experience for some people it is in their second lab when they begin to integrate

learnings and experience the most personal growth. So, if you are interested and available - I'd love for you to be part of it. Be sure to respond to everyone so Ann gets the number of manuals and name tags right.

Would everyone copy everyone else on all the messages. That would be a great help.

Bob

Robert A. Gallagher
Organization Development Consulting & Training
odct@downeast.net
www.orgdct.com

02/02

odct

From: "Robert A. Gallagher" <odct@downeast.net>
To: "Liz Tunney" <tunneyee@juno.com>; "Rebecca DeBow" <rebeccadebow@hotmail.com>; "Bill Yon" <Nandjedi@aol.com>; "Liz Workman" <LWorkman@sewanee.edu>; "Ann Holtz" <jannholtz@mindspring.com>; "Ceci Duke" <dukec@mindspring.com>; "Kay Collier-Slone" <diolex@aol.com>
Cc: "Paul Rider" <prider@mn.rr.com>; "Jim Young" <JimY742799@aol.com>; "Bev Elliott" <beverley@stbartsatlanta.org>; "Betty McWhorter" <esmpat@aol.com>; "Kate Harrigan" <harriganbullock@compuserve.com>; "Peggy Bosmyer" <pbosmyer@aol.com>; "Carolyn Lumbard" <revcarolyn935@rochesterepiscopaldioocese.com>
Sent: Sunday, October 20, 2002 4:17 PM
Attach: LTI Lab Staffing 2003 - 04.doc; Conference Center Criteria for LTI Labs.doc
Subject: LTI Trainer Update

LTI Trainer Update

Several of us met during the recent Group Development Lab to work on system development issues (e.g., Ann Holtz, Bob Gallagher, Rebecca DeBow, Ceci Duke, and Liz Tunney). Here's what we decided.

FEES FOR SR. TRAINERS

Looks like we can follow through on the earlier decision to pay something to Sr. Trainers serving on staff between Jan 02 and the end of Jan 03. Depending on whether the Mississippi lab in Dec goes and if all the Jan 03 labs "go" -- There may be around \$1000/lab served.

Here's what Ann and I have about service to date:

Liz W - 1 lab
 Ann - 2 labs
 Bob - 3 labs

INCREASING FEES

Our intention was to do that across the board. We created a problem for ourselves by the way the labs are a scheduled. So, only some labs will increase in the next cycle. We need to look more carefully about the sequence of labs for 04. Just to record it someplace our intention was to charge the following for the June 03 - Jan 04 Cycle HI - \$500; HI & GD \$750 (that will work if they do HI in June, if done in Jan 03 the fee ends up being \$500); HI & DS \$750 (doesn't work because we already set a price of \$500 for that package from the last cycle); just DS or GD \$550; all three HI, DS, GD was to be \$900 (ends up at last cycles rate of \$800) Con Skills \$650

MISSISSIPPI CONTRACT

Ann has been working with David Johnson in a process that involves the diocese committing to send 12 participants (people in process to be consultants) to three labs each (HI, DS, Con Skills) if we hold those events in the diocese. Looks like we will do that. It gives us a base group for many of our labs next year. We would give them a special rate for all 12. Our regular rates will apply to all other participants.

10/20/02

May also mean doing an HI Lab this December in Mississippi.

TRAINER STAFFING OF LABS 03 - 04

See the attached. If you can not receive attachments like this send me a fax number.

We have most labs covered (at least with minimal staffing).

Kay and Liz W. -- Can one of you training on Design Skills in Jan 03 and the other for HI in June 03?

Also, if you want to serve on other staffs we will need back up in case registration goes really well.

Let me know!

TRAINER DEVELOPMENT

1. Co-trainers want to stay at that level for this cycle
2. Some apprentices will begin serving with training staffs in this cycle (as they complete three-phase training)
3. We agreed to invite several people, to join as Sr. Trainers if they are interested (Betsy Greenman to suggest a few, Hal White, Kathy Fort, Billie Alban, two through Ann. Two to check out before going ahead -- Bill Thomas (an NTL trainer - not the one from AL, one person said "hopefully not the one from Canada).; also Linda Nelson (I'm to check he out with Lowell Grisham)
4. We invited Karen Maxwell to consider the apprentice program. She is thinking about it and will let us know.

SYSTEM DEVELOPMENT NEEDS

It would be nice -- to have a grant of \$35,000 +/- --- for things such as:

- ToF T days (4 days together to explore trainer interventions, etc)
- Marketing, including a web site
- Logo
- other

Talked about Ann & Bob talking more about the idea of a grant. Wondered about asking for help from Tom Frazer, Lowell Grisham, Melissa Skelton and others. Get an endorsement from Loren, Jim F and Bill, etc. Wondered about contacts of Liz W and Kay

CONFERENCE CENTERS

We discussed using centers in Mississippi (part of deal with the diocese) and Atlanta (to get ourselves active in a large metro area).

Ann- is following up on Mississippi

Ceci - on Atlanta

We created a work sheet for trainers (see attached) to use in assessing centers (before use and after). Some is "must have", some is "it would be nice". In any case we would like to cut down on surprises trainers might face in using new centers.

What am I missing?

Bob

Robert A. Gallagher
Organization Development Consulting & Training
odct@downeast.net
www.orgdct.com

Leadership Training Institute REGISTRATION 2003 - 05

Name _____
Address _____
City _____ State _____ Zip _____
e-mail address _____ Phone _____ / _____
(All further communications will be by e-mail)

Organization (parish, company) _____

- We operate on the assumption that all lodging is for single rooms unless you contact us asking for other arrangements. -In registering please: 1. Indicate the lab(s) you are registering for and 2. Send a check for the full conference fee (meals & lodging costs are paid when you arrive)

I am registering for:

- ___ Human Interaction Lab - *Circle one* - Oct 03, Jan 04, June 04, Nov 04 -- \$500
___ Human Interaction Lab - Jan 05 -- \$550
___ Design Skills - *Circle one* - Oct 03 -- \$350; Jan 05 -- \$550
___ Group Development - *Circle one* - Jan 03 -- \$350 Nov 04 -- \$550

Training Packages

___ **Three core labs package:** Human Interaction Lab (*Circle one* - Oct 03, Jan 04 or June 04) and Group Development (*Circle one* - Jan 04 or Nov 04) and Design Skills (Jan 05) Labs -- **\$850 for all three**

[Note: If you sign up by August 04 for the Human Interaction Lab in Nov 04 or Jan 05 you will be eligible for the same rate with GD and DS labs being done in the 05 cycle of offerings; Dates TBA]

___ **Two labs package:** Human Interaction Lab (*Circle one* - Oct 03, Jan 04 or June 04) & *Circle lab and dates you want* - Group Development (Jan 04 or Nov 04) OR Design Skills (Jan 05) Labs -- **\$750 for two labs**

Teams: If you are sending a team from your organization, contact us about a package rate

In all packages: Prerequisite requirements must be met. Payment Arrangement: combination packages must be signed up for in advance. Otherwise costs are by individual event. See LTI web page for more information on packages

Consultation Skills Nov 04 This program has its own registration process. Look on the web at www.LTI-Episcopal.org (go to "Programs"; go to October 4 - 8, "Deer Isle, Maine" link) or contact Bob Gallagher a odct@downeast.net

-Enclose full payment of the fee. Payable to: "Janet Ann Holtz", LTI registrar
Mail registration and check to: Ann Holtz; 6700 Stone Mill Dr; Knoxville, TN 37919
-Room & meals costs will be due on arrival at the beginning of each lab.
Checks made out to "Janet Ann Holtz" -Please add a note to your registration regarding the required prerequisite training. Where and when did you complete it?
Who was on the training staff?

LEADERSHIP TRAINING INSTITUTE

A training network serving the Episcopal Church and other organizations

Training Programs in 2003 - 05

October 13 - 17, 2003 --- Camp McDowell, Alabama;

Human Interaction Lab
Design Skills Lab

January 12 - 16, 2004 --- Camp McDowell, Alabama

Human Interaction Lab
Group Development Lab

June 14 - 18, 2004 --- Genesis Center, Massachusetts

Human Interaction Lab

October 4 - 8, 2004 --- Deer Isle, Maine

Consultation Skills Lab

November 8 - 12, 2004 --- Camp McDowell, Alabama

Human Interaction Lab
Group Development Lab

January 24 - 28, 2005 --- Camp McDowell, Alabama

Human Interaction Lab
Design Skills Lab

Each LTI lab will begin after breakfast on Monday and continue until 11:30 a.m. on Friday. The interactive character of the training experience makes it essential that participants **arrive Sunday evening**, and participate in all scheduled sessions throughout the week; no late arrivals or early departures

See our web site at -- www.LTI-Episcopal.org

Commitment - Competency - Emotional Maturity

Description Of the Events

Human Interaction Lab - Focuses on interpersonal communication and awareness of self in a group. Through a variety of experiential activities, participants will look at what goes on in the life of a group and learn more about the effect of their own participation. The aim is to increase skills in the leadership functions which maintain and enhance the life of a group and help it in accomplishing its tasks. The primary method used is the T-Group. The Human Interaction Lab is the required. Prerequisite training for most other LTI events.

Group Development Lab - This lab focuses on understanding and effectively sharing leadership in groups and teams. Attention is given to developing an awareness of group dynamics, balancing task and relationship issues, establishing group norms, and skills for group facilitation. *Prerequisite Training Required:* A Human Interaction Lab with LTI or another approved group

Design Skills Lab - Aims at developing skill in designing and conducting experiential and participatory education, meetings and programs. Attention is focused on identifying the interests and needs of participants, defining purposes, designing and conducting experience-based activities, and evaluating outcomes. The lab builds on and continues to develop the learning of the Human Interaction Lab. *Prerequisite Training Required:* A Human Interaction Lab with LTI or another approved group.

Consultation Skills Lab - For those in a consulting or other third party role This event focuses on:

- learning and improving your use of the steps in the consulting process
- assessing and improving your own skills, awareness of your consulting style, ethics, needs, and assumptions in consulting, etc.
- increasing your awareness of and skill in managing the dynamics among the client, consultant and needs of the work situation; including a collaborative mode of inquiry, and the ability to form authentic helping relationships in client systems
- being authentic in the consulting role; becoming more comfortable with the use of "self" in consulting

Prerequisite - Participants must have completed Human Interaction and either Group Development or Design Skills with LTI or another agency; or have completed CDI (the Church Development Institute)

For more information on LTI and these programs: Contact Ann Holtz at 865-588-0674 and jannholtz@mindspring.com

For Advanced Training in Congregational Development - LTI recommends participation in CDI - The Church Development Institute as a way to increase leadership skills for congregational development - www.cditrainers.org

The Laboratory Method of learning is used in all programs. Lab Learning involves reflection on immediate here-and-now experiences within the learning community, interpreted through applied behavioral science theory and practice. These activities involve a certain amount of stress. It is not, therefore, advisable for persons to participate who are living in the midst of unusual stress in their personal or professional lives.

Episcopal Church Related - LTI has been supported by a number of dioceses and church related organizations. Most staff are lay or ordained Episcopalians.

Worship - There is the opportunity to worship in the Episcopal Church's tradition while at the lab. All are welcome. No participant is expected to participate as part of the program.

Reflection Opportunities - There are opportunities to reflect on the relationship between what you are learning and your theological, philosophical or value tradition. This is part of the program. This also provides an opportunity to make use of skills learned in the lab in a conversation that includes people from various traditions. LTI encourages reflection on group and organizational experience in light of participants' values and beliefs. The laboratory setting allows practice in communication among people of different faiths and backgrounds as well as people who have no religious affiliation or interest. LTI staff will support an atmosphere of ecumenical openness, tolerance and respect for differences.

LTI is - a network of experienced lab trainers who have served the church and other organizations. Senior LTI trainers are: Kay Collier- McLaughlin, Ann Holtz, Bob Gallagher, Liz Workman, and Bill Yon..

Room & Meals Cost - **Camp McDowell** - \$310.00 single room with bath; **Genesis Center** \$315 single room with sink in room, bath down hall (Note: one night is a meal out at your own expense) Rates may increase during the year. Full payment of the conference fee is sent in with your registration. That is non-refundable. Room and meal costs are paid on your arrival. **On Deer Isle** - Participants arrange for their own housing and meals. See the LTI web site for complete information.

Transportation from the airport is best done by car rentals and arranging to share costs with other arriving participants. Updated participant lists are sent out before the event to facilitate arrangements.

Also see our web site at -- www.lti-episcopal.org

June 2003

LEADERSHIP
TRAINING
INSTITUTE

Human Interaction Labs

October 13 - 17, 2003

January 12 - 16, 2004

- Personal Authenticity
- Improve Interpersonal Skills
- Increased Awareness of the Effect of your Behavior in a Group
- Seeing More Options for Effective Leadership in a Group

For clergy and lay leaders,
directors of spiritual formation,
congregational development
consultants, educators, leaders in
NPO's and business

www.LTI-Episcopal.org

LEADERSHIP
TRAINING
INSTITUTE

Human Interaction Lab

June 14 - 18 Massachusetts

November 8 - 12 California

January 24 - 28, 2005 Alabama

- Increase awareness of group dynamics
- Skills to more effectively intervene
- Improve Interpersonal Skills
- Increased Awareness of the Effect of your Behavior in a Group
- Personal Authenticity
- Seeing More Options for Effective Leadership & Participation in a Group

For clergy and lay leaders, directors of
spiritual formation, congregational
development consultants, educators,
leaders in NPO's and business.

Contact: Ann Holtz 856-588-0674

www.LTI-Episcopal.org