

Trinity Church Wilmington

Annual Leadership Retreat 2014

Purposes & Schedule	2
Some Key Factors	3
The Benedictine Promise: Overview	4
The Shape of the Parish – the model	5
The Renewal – Apostolate Cycle – the model	6
Organizational Life Cycle	7
Strategic Grid	8
Leadership Styles	9
Type Group Profiles	10-15
Type – vestry 2012 & 2014	16
TKI – Vestry group Profile	17

Note: We are not assuming that all the material in this packet will be used. It is here so we have it available if our conversation moves in a related direction. It may also be used by the parish at a later time.

Overall Purposes of Leadership and Vestry Retreats

A yearly leadership conference that is a mix of:

Developing strategies and plans for the improvement of parish life & ministry. This would be based on a process of reflecting on and learning about, the whole, or some area of parish life

Community building among parish leaders

Spiritual development

Increasing the common competencies of parish leaders for the above. Part of our purpose is for the vestry and other leaders to increase their skills and knowledge for congregational development and leadership.

Specific area of interest for this year

Increase the competence of the clergy and vestry for engaging strategic thinking and oversight as that can best be done in an Episcopal parish church (continuing from 2013)

Note: Elements may be changed as needed to work with issues that emerge in the course of the work.

Friday Evening ... Ignatius, Bishop of Antioch, and Martyr, c. 115

6:00 Social Time

7:00 Supper

7:45 Work Session: 1) Overview 2) Connecting 3) Getting started –

9:00 Compline – beginning with intro to doing the Office in a group (Michelle); then Compline

9:30 Social time

Saturday ... Saint Luke the Evangelist

8:00 Breakfast

9:00 Morning Prayer

9:20 Work Session

10:30 Break

10:45 Work Session

12:00 Lunch

12:45 Work Session – 1) continue assessing work 2) how we get things done

2:15 Rest – Recreation

6:00 Supper

7:00 Work Session

9:00 Compline

9:20 Social Time

Sunday Nineteenth Sunday after Pentecost

8:00 Breakfast

8:45 Holy Eucharist

9:30 Work Session – 1) Wrap up as needed – next steps, 2) Evaluation 3) Routine vestry work beginning at 11:00

12:00 Lunch

Some Key Factors

Please assess your parish using these factors:

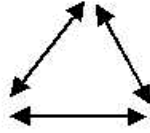
	Low				High
1. Overall satisfaction with parish life & ministry	1	2	3	4	5
2. Formation of adult members as Christians in the tradition of the Episcopal Church - the total impact of Liturgy, spiritual guidance, overall parish climate, programs. At least 1/4 of those present on Sunday are very competent in the spiritual practices of the Episcopal Church.	1	2	3	4	5
3. Vibrant - The extent to which parish life is vibrant, creates a "buzz" that excites the congregation and spills over to the wider community; an attractive energy	1	2	3	4	5
4. Alignment - The elements of parish life are mostly in alignment: income-expenses, the energy and funds to carry out the vision we have; liturgical space or number of services to match the number of attendees, and so on	1	2	3	4	5
5. Sunday - Great Liturgy and social time together	1	2	3	4	5

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The Benedictine Promise: Overview

The three elements of the Benedictine Promise, and the whole of Benedictine spirituality, can help us see some of the hidden dynamics of parish life.

CONVERSION OF LIFE As a parish we find God on our journey together and in the new places we will go as a parish; in losing life to find life; in our openness to transformation.



STABILITY As a parish we find God here and now in the relationships and pattern of our life together.

OBEDIENCE As a parish we find God as we listen deeply to the world; to Scriptures; to the church, now and through the ages; to each other; to the creation; and to the deepest longings and prayer of our heart.

Benedictine spirituality is part of our Anglican DNA. It's the way of the Prayer Book and is embedded in much of the way we function as parish communities. We can make use of it in the work of congregational development: 1) as a way to see and enter into the depth of our own culture as Episcopalians and 2) because it is the spirituality of particular communities that have developed a capacity, over time, to maintain their integrity while renewing themselves in adaptation to the environment.

Look at the dynamics of parish life

You might think in terms of the whole parish or of a specific event or experience.

- What is the predisposition you see in the parish's behavior toward stability, change, or listening processes? Which direction do we generally tilt towards? Which is our anxiety often focused upon?
- In the parish's expression of stability, conversion of life, and obedience what seems healthy to you, what unhealthy? Is the stability simply being static? Is the conversion simply being driven by an impulse to change? Is the obedience endless listening and process or too little listening?

Develop a parish culture that is marked by:

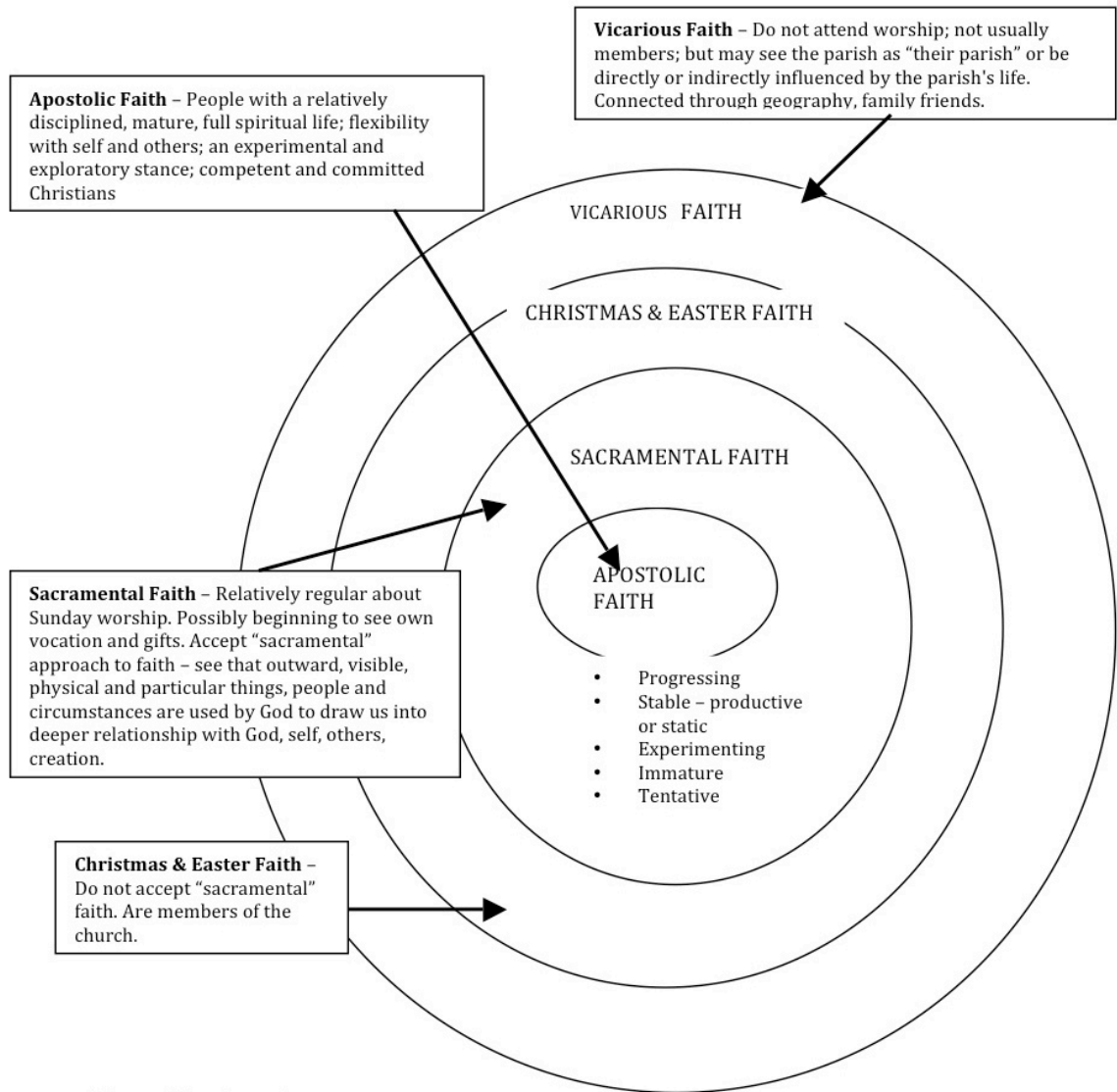
Stability – Especially seen in Liturgy, prayer and relationships.

Obedience – Seen in our openness to listen to, and respond to, one another, our bishop and the larger church.

Conversion of Life – Out of our life of stability or obedience we see and act on new challenges and opportunities for mission and building up the Body of Christ.

Copyright Robert A. Gallagher, 1987, 1997, 2002, 2003 For more on the model see Robert Gallagher's *Fill All Things: The Dynamics of Spirituality in the Parish Church*, Ascension Press, 2008

The Shape of the Parish



The model can be used:

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

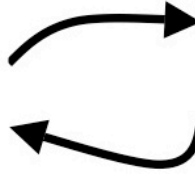
From *Fill All Things: The Spiritual Dynamics of the Parish Church*, Robert A Gallagher Copyright 2008
 "Shape of the Parish" Diagram -- Robert A. Gallagher/Mary Anne Mann, 1983; Revised RAG 1999, 2003

The Renewal – Apostolate Cycle

The Renewal - Apostolate Cycle is a way of describing a central dynamic of Christian life. The Cycle focuses our attention on the Christian's movement between being renewed in baptismal identity and purpose and living as instruments of God's love and grace in daily life. The Cycle is interested in both the individual's movement and in the ways in which the parish church supports and facilitates that movement. This is the primary task of any parish church.

RENEWAL

Renewal in baptismal identity and purpose in worship, study, the parish's social life, and being equipped for Christian action



APOSTOLATE

Participation in the work of Christ in service, evangelization and stewardship

In areas of:

- Workplace
- Family & Friends
- Civic Life
- Church

A Cycle

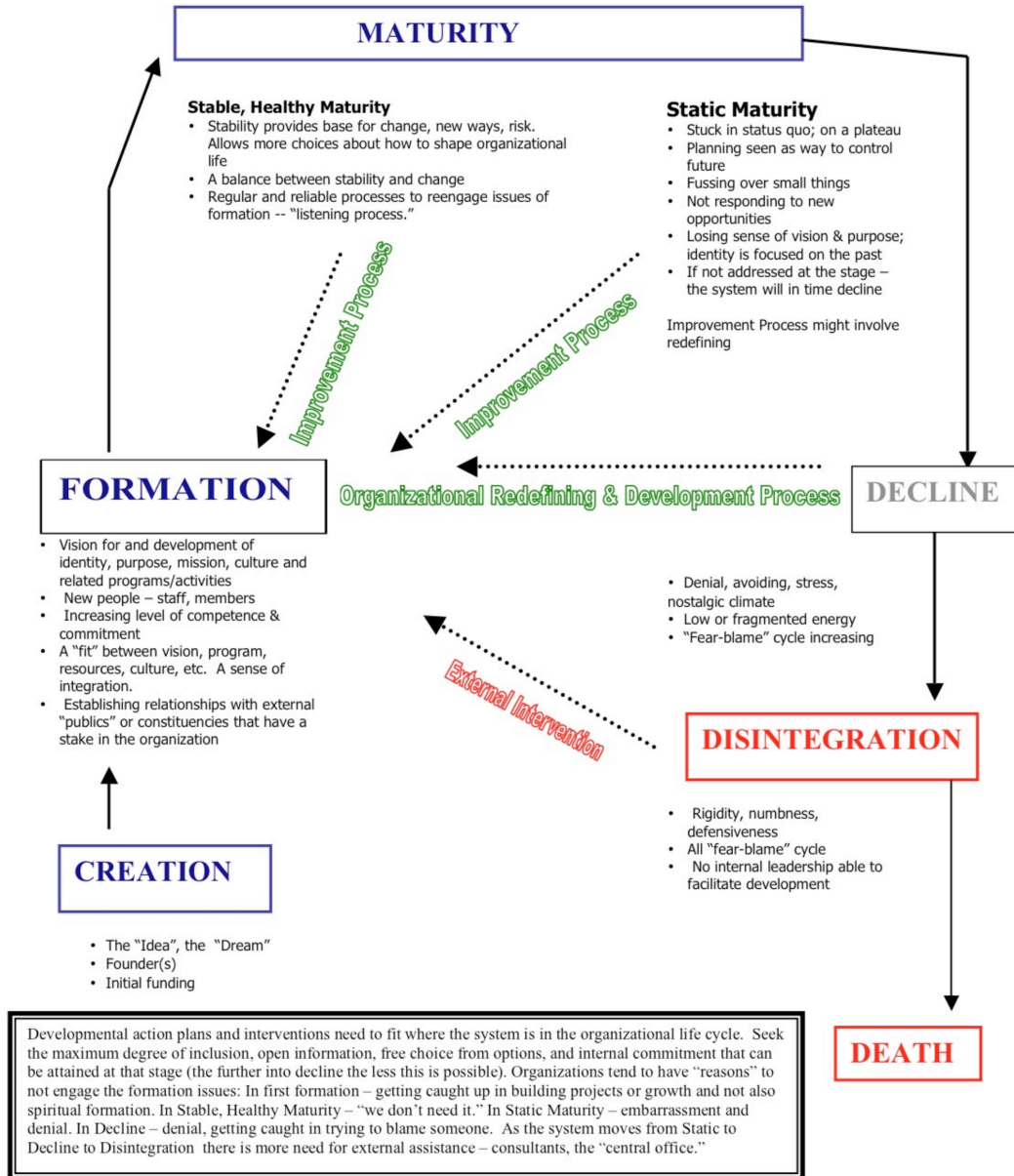
The cycle is between a conscious and intentional attention to God, prayer life, our relationships, Christian formation **and** a subconscious reliance upon God as members of the Body of Christ, in the workplace, family, friendship, civic life and congregational life.

In that Cycle:

We need:	Which is helped by:	Which the parish helps by:
To accept our dependence on God	Openness to spiritual guidance	An emphasis in its life on worship; nothing comes before the Eucharist and Daily Office. Also, more attention to formation and spiritual growth than other programs or ministries.
To accept responsibility for ordering our spiritual life	Establishing a rule of life	Offering programs and guidance in creating, experimenting with, and revising a spiritual discipline.
To accept our interdependence with others in the Church	Life in Christian community, a parish church	Being a healthy and faithful parish church and by helping people relate to the parish community in ways appropriate to their personality and the parish's capacities. Having opportunities for social life and the development of friendships.

From *Fill All Things: The Spiritual Dynamics of the Parish Church*, Robert A Gallagher, Ascension Press, 2008

ORGANIZATIONAL LIFE CYCLE



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Strategic Grid

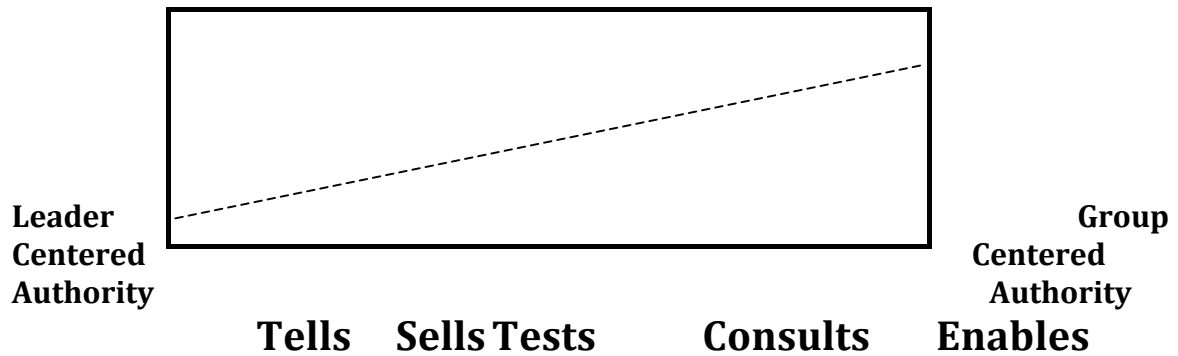
Resource in managing the “demand system.”

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

How to Improve the Parish’s Health:

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

LEADERSHIP STYLES



Joins

- | | | |
|----------|---|--|
| 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's ideas on problem. After receiving ideas, leader makes decision. |
| Enables | - | Leader enables group to make the decision. This may include the leader setting limits regarding what the group may consider and/or establishing procedures and processes for the group's work. |
| Joins | - | Leader acts as participant in the group. Group makes the decision. |

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

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

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

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

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

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

Type Profiles

Used in assessing team functioning.

What is the team's

- Strength
- Blindside
- Dynamics
- Potential areas of tension

Quadrants

Change, team or organizational culture; looking at relationships with people you are serving (clients, members, customers); leadership styles; work styles

Temperament

Leadership style & competence; issues around the leader; roles/authority/responsibilities

Functions

Communication issues, team direction

16 Types

Exploring interpersonal effectiveness; issues of personal fit for a task; looking at team strengths/blindsides

Decision Making Dynamics

Exploring dynamics in decision making, problem solving

For more information see *Introduction to Type in Organizations*, Sandra Krebs Hirsh and Jean Kummerow, CPP and *Introduction to Type and Teams*, Sandra Krebs Hirsh. CPP

Quadrants Profile

Change, team or organizational culture; looking at relationships with people you are serving (clients, members, customers); leadership styles; work styles

<p>IS</p> <p>Holds onto what has worked and served the group in the past. Pays attention to details. Good at administration; developing and using procedures. Tends to be quiet, reflective, practical. Helps systems maintain continuity. In change efforts will help the group hold onto what has worked and see what needs to be preserved. May resist change if the process isn't appreciative enough and clear about what we will maintain as well as what needs to be changed.</p> <p>David Hamilton Lynn Warner David Smith Fred Thomas</p>	<p>IN</p> <p>Has a vision for a new way of approaching things. Is usually thoughtful, reflective, internal. Can help the group think about things differently, open up new ways of doing the work. Makes good use of research and speculative ideas. In change processes is motivated by an internal vision of what might be; wants to reflect and think about the possibilities before acting. May be helped in a change process by being able to read relevant material before moving into action.</p> <p>Patty Downing (S) Betsy Chapin Ginny Wilder</p>
<p>ES</p> <p>Wants to take action and be focused on achieving results. Energetic, outgoing, practical. Frequently wants to move quickly. Values making things "work"; being effective and efficient. In change efforts wants to see how it will improve how things are done; that the change will bring better results.</p> <p>Margaret Valala (N, P) Kathy V (T) Donald Copson</p>	<p>EN</p> <p>Enjoys trying new things; likes change. Usually outgoing, high energy, active, can be sporadic. Talks about new ideas, ways of working and being. Is focused on change; wants to move into action promoting and implementing a new way or project. In a change process is helped by making the change and seeing what happens; wants to "just try it!"</p> <p>Rick Carroll Ken Brown Kathryn Jakabcin (T) Chris Ennis</p>

Team Profile: Temperament

Leadership style & competence; issues around the leader; roles/authority/responsibilities

SJ David Hamilton	SJ Lynn Warner David Smith Fred Thomas	NF Patty Downing (S) Ginny Wilder	NT Betsy Chapin
SP	SP	NF	NT
SP	SP	NF	NT Chris Ennis
SJ	SJ Margaret Valala (N, P) Kathy V (T) Donald Copson	NF Kathryn Jakabcin (T)	NT Rick Carroll Ken Brown

SJ—Guardians: Help stabilize, consolidate strengths. Strong sense of responsibility. Want to be seen as reliable and dependable. May be too bureaucratic; keep using same approach when something new is needed.

SP—Artisans: Troubleshooter; want to do things as they see fit. Want to be seen as risk takers, clever, resourceful, being spontaneous and playful. Can be too utilitarian and practical.

NF—Idealists: Catalyst; focused on values, vision, dreams, possibilities. Seeking something unique, special. Want to be seen as authentic, inspirational, and inclusive. Can be too optimistic, naïve.

NT—Rationals: Architect and builder of systems; logic and originality. Want to be seen as competent, logical, as good at analysis. May be too competitive and aggressive.

Team Profile: Functions

Communication issues, team direction

1. Place team members in the appropriate function area.
2. Discuss – in terms of communication processes --- what are the team’s likely strengths, weaknesses, areas of tension, and other dynamics?

ST	SF	NF	NT
<p>What steps are needed to get the job done? What will the cost be? What information is needed?</p> <p>David Hamilton</p>	<p>What will be the impact on people? What can be done to help people?</p> <p>Lynn Warner David Smith Margaret Valala (N, P) Kathy V (T) Donald Copson Fred Thomas</p>	<p>Who will be involved in the decision making? What are our core values in this work?</p> <p>Patty Downing (S) Kathryn Jakabcin (T) Ginny Wilder</p>	<p>What new ways of approaching this are available? What are related theories and models?</p> <p>Rick Carroll Ken Brown Betsy Chapin Chris Ennis</p>

Team Profile: Sixteen Type Preferences

Exploring interpersonal effectiveness; issues of personal fit for a task; looking at team strengths/blindsides

1. Place members of your team in one of the preference areas.
2. Discuss – what strikes you about the result?

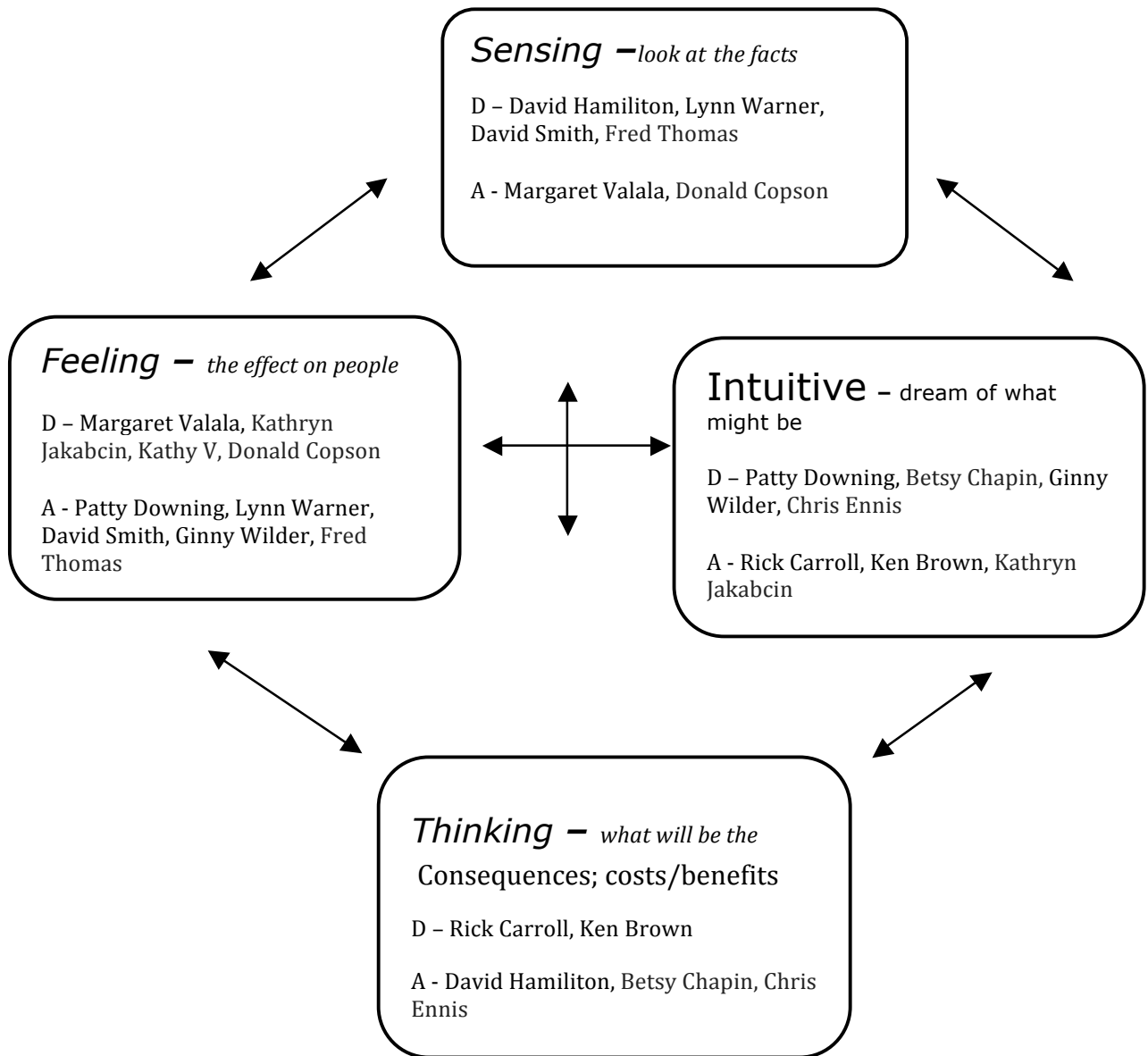
<u>ISTJ</u> David Hamilton	<u>ISFJ</u> Lynn Warner David Smith Fred Thomas	<u>INFJ</u> Patty Downing (S) Ginny Wilder	<u>INTJ</u> Betsy Chapin
<u>ISTP</u>	<u>ISFP</u>	<u>INFP</u> [Michelle Heyne Bob Gallagher]	<u>INTP</u>
<u>ESTP</u>	<u>ESFP</u>	<u>ENFP</u>	<u>ENTP</u> Chris Ennis
<u>ESTJ</u>	<u>ESFJ</u> Margaret Valala (N, P) Kathy V (T) Donald Copson	<u>ENFJ</u> Kathryn Jakabcin (T)	<u>ENTJ</u> Rick Carroll Ken Brown

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

Team Profile: Decision Making

Exploring dynamics in decision making, problem solving

1. Place team members in relationship to their dominant function (might also note auxiliary)
2. How could the team accept and use the strengths it has while also paying attention to all functions in decision-making?



Type – Vestry 2012

Trinity 2012 vestry

E - 8 I - 7 S - 5 N - 10 T-8 F - 7 P- 5 J- 10

Therefore Organizational Character:

-- by the numbers - NJ

-- by clergy leadership - INFJ

Type – Vestry 2014

Trinity 2014 Vestry

Trinity 2012 vestry

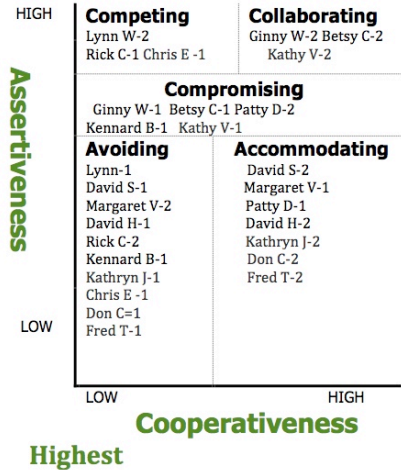
E - 7 I - 7 S - 7 N - 7 T-5 F - 9 P- 1 J- 13

Therefore Organizational Character:

-- by the numbers - FJ

-- by clergy leadership - INFJ

Trinity Vestry Conflict Styles Oct 2014: Two basic aspects of all conflict handling styles



Assertiveness – the degree to which a person attempts to satisfy his/her own concerns

Cooperativeness – the degree to which a person attempts to satisfy the concerns of another person

- We will look at five different styles or modes people use in managing conflict. Each is a mix of these two basic aspects – assertiveness and cooperativeness

- The style we use at any particular time is based on:

- The skills we have
- The situation
- Our ability to assess what is appropriate in that situation
- Our willingness to operate in an effective and appropriate manner

- The key to being more effective is in:

- Increased awareness of self, others and the situation
- An expanded range of behavior and skills
- Our commitment to becoming more effective at conflict management

Leadership: Usually requires some ability for assertiveness and high emotional intelligence, especially self-management of our moods and emotions. Being able to effectively use the competing and collaborating styles is essential in leadership. Not usually very important if work is primarily technical or a service profession.

