Trinity Church Wilmington

Annual Leadership Retreat

2015

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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:

1. 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
2. Community building among parish leaders
3. Spiritual development
4. 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
The "specific area of interest" in 2013 and 2014 was this -- "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."

That broad area was raised again as something requiring attention. Our assumption is that the need this year is less about the skills and knowledge of "strategic thinking and oversight" and more about skills and processes to keep things constructively and effectively in motion.

While working on parish issues that remain on the table we will work at
1) Clergy expanding their skill range by strengthening the more assertive areas (Competition and Collaboration, especially collaboration) and
2) Using methods in the vestry that encourage an increased assertiveness; especially in the ability to collaborate.

For example, last year when we all left the retreat there seemed to be agreement on the rector's proposal to reduce the number of vestry meetings. That didn't come to pass. The issue here isn't that someone did something wrong. Our assumption is that on reflection some members saw problems with the proposal that they only became fully aware of after the retreat was over. Our guess is that the rector would still like to see the proposed idea implemented and some on the vestry have concerns about that. Our approach will not be to invite debate on the proposal. We will come at this, and other matters, in this way:

1) A systems approach – If we change one piece of a system it creates a ripple effect of change because that piece is interdependent with other elements. We see some of those pieces as we work and others emerge either on reflection or as we experience the change and see the result.
2) Creating and maintaining parish health is dependent on two broad factors – listening to the parish community and knowing how to use models of pastoral theology. The second helps leaders know how to sort out all the information they hear from the listening processes. Without the listening processes a parish lives in an abstraction; without the pastoral theology the parish can be driven by a "majority vote" (or impressions of what most people want) that lacks the wisdom of Christian tradition as it arises from members who are not adequately formed in the tradition.

3) Blind spots develop in parishes. Those blind spots can be identified. We'll do some of that.
4) We will look at the system of pressures, demands, and expectations that serve to keep the parish system stable but can also become barriers to needed changes.

We have been looking at all this in relation to the instruments the vestry took last year (TKI and MBTI). That offers a take on the situation and a way of doing some useful work.

We'd agree that the parish system needs a sense of broad direction and "overall movement" in that direction. Also that some members of the vestry and the parish will be more inclined to work on "one shot" projects as individuals or in working groups.

One issue is how do we get the needed mix of gifts in the decision making-action process? People who will listen to the parish and one another, learn enough pastoral theology to keep the parish grounded in faith and practice, generate viable options, reflect on it all, and create a way forward. For that to be a realistic way forward it needs to take into account what all systems struggle with -- 1) how to manage the tension between change and stability? and 2) how to manage the polarity of the need to maintain and grow the parish's identity, integrity and integration and also adapt to the emerge needs of people and society?

MBTI

Between 2012 and 2014 the vestry's MBTI temperament profile shifted somewhat. It's more SJ.

That means more focus on stabilizing and consolidating 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. Guardians.

What we want to suggest is that 1) "the "natural resistance to change" isn't a "stumbling block" but a God given gift that we see in people of the SJ temperament. It is the contribution they make to the health of a parish (or any organization). Also, those most clearly scoring as SJs are also introverts. So, their caution about a proposed change may not fully emerge until they have had a chance to reflect on it a bit. All those people are still on the 2015 vestry.

That's in contrast to the two clergy who both score as NFs --- 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.

As you know it is 101 Christianity to 1) know that human beings have a tendency to assume that their way of coming at the world is correct (Is God's way) and 2) that the church and the world needs a diversity of gifts (*Now there are varieties of gifts, but the same Spirit; and there are varieties of services, but the same Lord; and there are varieties of activities, but it is the same God who activates all of them in everyone.To each is given the manifestation of the Spirit for the common good.*-1 Corinthians 12)

The natural tension between people with different gifts is managed in a healthy manner in two primary ways: 1) Staying grounded in the truth -- *Indeed, the body does not consist of*

one member but of many. If the foot were to say, 'Because I am not a hand, I do not belong to the body', that would not make it any less a part of the body. 1 Corinthians 12 and 2) Love -- *If I speak in the tongues of mortals and of angels, but do not have love, I am a noisy gong or a clanging cymbal. ... And now faith, hope, and love abide, these three; and the greatest of these is love.* 1 Corinthians 13

The size and schedule of the vestry and it's relationship to other elements of the parish system (adequate listening processes, using working groups, etc.) is certainly an important matter. Whatever you all decide to do about that needs to serve the parish for the next ten years (+/-). The long term matter of shaping a healthy parish culture is this -- the living of spiritual practices that continue to effectively and efficiently nurture 1) staying grounded in the truth and 2) love for God and one another.

A parish exists to : 1) worship God and 2) form members in spiritual practices that allow them to serve a responsible people in their workplace, citizenship, families and friendships.

Prescription:
1) Increase effective listening processes in the parish as a whole and smaller units. Pay attention to the principles of survey-feedback.
2) Make sure that all leaders know several pastoral theology models they can use in decision making processes
3) Strengthen the spiritual practices of the congregation by providing regular and frequent opportunities to explore Anglican spirituality and help people develop useful and balanced spiritual practices (Rule of Life). Increase overall proficiency in spiritual practices.
4) Address the need for a more balanced parish common life. As with most Episcopal parishes Trinity is stronger on Eucharist and Community and weaker on Daily Office and Reflection. How to maintain and build upon the strengths while also strengthen areas of weakness?

You'll notice that these are all longer term matters. Becoming stronger is a 7 year goal not something to expect in one year. We'd also note that most of these items are just about the core business of the parish. The parish clergy are the key actors in this.

TKI

Last year we used the TKI to look at "conflict styles." The instrument also helps us understand decision making preferences.

The clergy and vestry were noticeably weak in the more assertive processes and skills.

That wouldn't be a problem if this wasn't a leadership group. 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.

Prescription:
1) Clergy expand their skill range by strengthening in the more assertive areas (Competition and Collaboration, especially collaboration)

2) Begin to use processes in the vestry (and parish) that encourage an increased assertiveness; especially in the ability to collaborate.

Overall we'd like to use the vestry retreat in a way that will increase the range of behavior and skills.

Our intention is to have you work on real issues for the vestry and parish while learning methods that may help pick up the pace and comfort of decision making.

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

Friday Evening ... Feast of Latimer, Ridley, and Cranmer Bishops and Archbishop, 1555, 1556

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 Hymn 24
9:30 Social time

Saturday … Feast of Ignatius, Bishop and Martyr Bishop of Antioch , and Martyr, c. 115

8:00 Breakfast
9:00 Morning Prayer -- Ps 20 Matthew 11:7-15 Hymn 1
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 Hymn 24
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

Connecting activity: What do you bring to the table?

There are certain core abilities needed for a vestry to be most effective: proficiency in Episcopal spiritual practices, ability to work as part of a team, understanding and acceptance of Episcopal Church polity regarding the parish church, skill in areas of work that are routine for the vestry of this parish.

Assess yourself and the vestry as a whole in each area

1. Proficiency in Episcopal spiritual practices – This is central because it has to do with those responsible for aspects of parish oversight "getting the business we are in." It doesn't mean that vestry members should be experts in pastoral and ascetical theology but that the vestry will work most effectively if members live the Christian life -- have a stated spiritual discipline, are at the Sunday Eucharist weekly, pray the Daily Prayers of the Church in some form, have ways of being reflective about their life and responsibilities, participate in some aspects of parish community life (e.g., coffee hour), and can articulate the relationship between faith and their daily life (in workplace, family and friends, civic life)

a. My proficiency in Episcopal Spiritual Practices

Needs attention	1	2	3	4	5	Is adequate or strong

Notes:

b. My impression of the proficiency of the vestry as a whole

Needs attention	1	2	3	4	5	Is adequate or strong

Notes:

2. Ability to work as part of a team – All groups have three interdependent elements to manage; there's a task to work on, relationships to manage, and individuals come into a group with their own needs and wants. Each element has associate behaviors and skills that help effectiveness. The three elements that may work together in harmony or may come into tension. A group that is excessively task-oriented may be get the job done but may build up resentments among its members because relationship and individual needs are not adequately addressed. A group that is overly relationship -oriented may enjoy being together, but let its task drift. The most effective groups are those that learn how to attend to all three aspects of the group's life.

a. My skills for helping a team accomplish its task, manage its relationships and attend to individual needs and wants.

Low skill	1	2	3	4	5	High skill

Notes:

b. My impression of the skill of the vestry as a whole

Low skill	1	2	3	4	5	High skill

Notes:

3. Understanding and acceptance of the Episcopal Church's polity regarding the parish church – For example, the role of the diocesan bishop in relationship to the parish and the rector/vicar, national and diocesan canon law in regard to the parish, the authority of the Book of Common Prayer, the parish in relationship to the diocese and diocesan convention, that a vestry is not a board of directors, etc.

a. My understanding and acceptance

Low	1	2	3	4	5	High

Notes:

b. My impression of the understanding and acceptance of the vestry as a whole

Low	1	2	3	4	5	High

Notes:

4. Clarity regarding the role of the vestry in this parish - Is the role the basic work of overseeing property and finances (as required in the canons)? To what extent is the vestry going to be involved in setting and monitoring the overall direction of the parish or participate in the strategic management task of navigating the parish toward its goals and through its politics? Is this vestry willing/able to give the time needed given the extent of involvement desired? How much centralization do we want? – is everything to come through the vestry? Is

there acceptance of legitimate independent action by the rector/vicar? What degree of self management do we want from working groups and committees?

a. My clarity

Low	1	2	3	4	5	High

Notes:

b. My impression of the clarity of the vestry as a whole

Low	1	2	3	4	5	High

Notes:

5. ***Competence in areas of work that are routine for the vestry of this parish –*** The specifics of this will depend on how this vestry approaches the issues of role and centralization noted in #4 above.

a. My competence – the extent to which I bring skills that fit the work of the vestry in this parish

Low	1	2	3	4	5	High

Notes:

b. My impression of the vestry as a whole - the extent to which we collectively bring skills that fit the work of the vestry in this parish

Low	1	2	3	4	5	High

Notes:

6. ***Overflowing into the parish's life -*** Being effective at doing its work and managing its own internal life are the most obvious things for a vestry to engage. Beyond all that the vestry has another significant impact on parish life – it is the spirit that overflows from the vestry's life and manifests, or not, the Holy Unity of the church. In an October 2006 "Dearly Beloved" letter to the parish, Father Richard Downing, of Saint James Parish, Capital Hill, DC, wrote this (Note: I have slightly edited his words for this document.) *Leadership and sharing of gifts and talents, however, is not the sole task for our vestry. The whole is much greater than the sum of its parts as each carries within us a piece of a solution to a problem, a perspective that someone else doesn't know, unique experiences that inform our creativity and our compassion. The challenges in working together lie in shaping our actions and our words in consonance with our faith and belief in this communal strength, for it requires great personal discipline, an awareness of our own failings, and time and energy that we may often feel we do not have to give because of other very real demands at home and on our jobs. …This act can set our hearts free in new ways that could be quite surprising individually and corporately. It extends well beyond just keeping St. James alive but makes it a place where as soon as a person enters our door, they will know Christ is alive, God is worshipped, and human beings are valued.*

My impression of the degree to which this happens in regard to this vestry and parish

Not much	1	2	3	4	5	Very much so

Notes:

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Lectio Divina/Connecting Activity

Instructions:

1. Use the Lectio Divina method in reflecting on the passage.
2. Small groups – each person share what word or phrase drew them and what response they had to that.
3. If time allows – brief whole group sharing

Mark 10:35-45 (used this coming Sunday at the Eucharist)
James and John, the sons of Zebedee, came forward to Jesus and said to him, "Teacher, we want you to do for us whatever we ask of you." And he said to them, "What is it you want me to do for you?" And they said to him, "Grant us to sit, one at your right hand and one at your left, in your glory." But Jesus said to them, "You do not know what you are asking. Are you able to drink the cup that I drink, or be baptized with the baptism that I am baptized with?" They replied, "We are able." Then Jesus said to them, "The cup that I drink you will drink; and with the baptism with which I am baptized, you will be baptized; but to sit at my right hand or at my left is not mine to grant, but it is for those for whom it has been prepared."

When the ten heard this, they began to be angry with James and John. So Jesus called them and said to them, "You know that among the Gentiles those whom they recognize as their rulers lord it over them, and their great ones are tyrants over them. But it is not so among you; but whoever wishes to become great among you must be your servant, and whoever wishes to be first among you must be slave of all. For the Son of Man came not to be served but to serve, and to give his life a ransom for many."

About Lectio Divina

A slow, meditative reading of scripture. At a time when we are alert. In a quiet and restful place. You need time enough so there is no sense of being hurried. It's an example of a method used in spiritual reading which is a useful element of an effective Rule of Life. The method could also be use with non-scripture readings.

In relation to it's connection with personality type preferences – It combines all four functions of personality Type (MBTI)

1. Select a passage; possibly in advance, the day before. Possibly a section of a reading from the Daily Office readings or next Sunday's Eucharist.

2. ***Lectio*** Read the passage slowly, pause as you want. Read slowly, gently listening for God's word for you. Read it again, and possibly again. Notice the phrases and words. What word or phrase draws your attention or touches you? Possibly read it aloud. Let the facts settle in; brood over them, allow them to enter imagination & memory. It is a matter of our spiritual development to cultivate the ability to listen deeply, to hear "with the ear of our hearts."

3. ***Meditatio*** - Reflection on the text. Bring to mind memories and associations related to the text. Allow the reading to sink into your heart and mind. Join Mary "pondering in her heart." Gently repeat the word or phrase, allow it to touch your thoughts, longings and hopes.

4. ***Oratio*** - Listening & responding to God. Respond silently or aloud with thoughts, words, desires, feelings, commitments, sorrow, and gratitude. Are there major concerns or joys in your life at the moment that this reading is addressing? Is there some area of your life where God may be inviting you to grow?

5. ***Contemplatio*** - Sit and enjoy the presence of God. Allow God to enter a deeper place in us. Trust that God is working within even if we do not notice. Rest in God's presence

Do not be overly tight about the steps. In practice they may flow from one to another; may happen at the same time. It may be a useful learning method to stay with the steps as separate acts for an initial period.

The Rhythm of Christian Life and of Lectio

The Christian life can be seen as a cycle between being renewed in out baptismal identity and purpose and an apostolate in which we are instruments of God's love in the world. 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. (See *Fill All Things*, Robert A. Gallagher, Ascension Press, 2008)

The practice of lectio *divina* depends on that cycle. It is grounded in our developing the capacity for a gentle oscillation between action/practice and receptivity and renewal. In the one we are being transformed into the likeness of Christ. In the other we are actively cooperating with God's grace in human life.

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Communication Skills

Paraphrase - saying back to the speaker what you heard them say. The goal is to accurately grasp the content of their idea. You may either repeat exactly what was said or you may summarize, restate the essence of what the speaker said.

- A useful method is to begin your response with ***"I hear you saying …"***

Active Listening - trying to state the feelings and underlying message that the speaker is communicating. Stating this as something you are "testing" rather than as a "truth". Allowing yourself to be corrected as the person restates their message.

Itemized Response - this involves giving a full response to a person's idea by telling them what you like/appreciate/can use in their idea and what concerns you about the idea. The assumption here is that it helps the group's work when we enable participation and seek what may be of value in each idea. Itemized Response helps: keep unformed but possibly useful ideas alive, establish a supportive group climate, and helps us see the fullness of an idea.

- A useful method is to frame your responses using the following:
  "What I like about it is …." ***"What concerns me is …"***

Making Statements Rather than Asking Questions or Sharing Opinions - this is to enable the group to stay with the issue being worked on. Frequently questions are really hidden statements, e.g., "don't you think it would be better if ...". Opinion sharing may better fit after work with beer or coffee.

Stating a proposal – Done to advance the conversation and decision making process. Given what you've heard, what do you know think is a way forward?

The use of core communication skills:

- Tends to help focus the group's discussion. It reduces repetition and explaining "what I really meant to say ..."
- Important in de-escalating conflict; also in preventing misunderstandings. It provides everyone with a way to build agreements, clarify misunderstandings, negotiate.
- Helps the group build on each other's ideas. Builds trust and strengthens relationships.
- Requires "group discipline" - using the skill even when it feels awkward; giving energy to it; putting aside your own judgments for the moment; being congruent in the body language and tone of voice.
- You are working to respect others and yourself in a manner that is responsive and assertive rather than evasive, passive or aggressive. The skills assume that you are ready to give positive attention to the other person rather than only appearing to be engaged and listening.

Feedback – Negotiation Worksheet

Formula	Intention	Your Notes in Preparation
1. "When you ….."	Note the behavior; describe it as specifically as possible.	
2. "I felt …."	Share how the behavior affected you. Just a few words – frustrated, pleased, angry, etc.	
3. Because I …"	Share what is going on with you that causes you to be affected that way. Note: this "owns" that the impact on you is not based only in the other person's behavior but also in the filters you bring to the situation	
4. "I would like …"	What would you like the person or group to consider doing?	
5. "Because …"	Why you believe it will help.	
6. "What do you think?"	Invite and listen to the response; explore options; problem solve together.	

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CHANNELING PROCESS: Parish Church Use

The goal in this process is to gather information on the "rubs" people are experiencing in the parish, e.g., concerns, new ideas for improvements, etc. The process if done regularly and frequently to keep issues in a process planned change and renegotiation. It is also designed to help the parish's leadership stay in touch with the system.

There are two primary ways that most parishes can make productive use of a Channeling Process:

1. As part of a parish conference or community meeting – a yearly gathering, open to all members; use the process to allow comments on any aspect of parish life.
2. The Vestry and Rector do the process about six months after #1

The Process

1. On newsprint, gather the team's "rubs" in two columns

date **CONCERNS**	**WISHES FOR IMPROVEMENTS**

Record all comments. Use the speaker's words.

2. Have the team prioritize items in each column.

Give each person one vote for every 3 or 4 items in a column. Members of the team go up to the newsprint to place a check mark showing their votes.

Do not try to "group" items that seem alike until after the voting.

3. On another sheet of newsprint, list the priority items and indicate a follow-up action for each.

date **PRIORITY ITEMS**	**FOLLOW UP**

The follow up action listed would be along the following lines:

- a person (or special team) agreeing to do some work on the issue and report back to the whole team
- a person (or special team) being authorized to take action as they see fit
- agreement to consider the issue at a future meeting the team for problem solving or strategy development
- Items could be referred to the vestry.

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Variations

- The use of a broad system assessment process may help the Channeling Process cover a broad field while also focusing on critical elements of the parish system
- Focus the process on a specific area of parish life, e.g., spiritual formation, adult education.

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Working with underlying concerns rather than jumping to positions

There are a number of skills and methods that are useful when you're trying to have more collaboration and/or to reduce the level of conflict in the parish. Collaboration is probably the hardest conflict management style to use because it requires more skill and emotional intelligence than other styles. Collaboration calls for a high level of assertiveness and an equally high level of cooperativeness. You are trying to address both your own concerns and those of others.

Collaboration: Easy to be in favor of--hard to do in practice.

To get collaboration you need a positional leader and a critical mass of people with the required skills and the stance. Possibly the most important skill is learning how to seek the positive and underlying concerns of the parties involved instead of jumping to a position.

Our tendency is to start with our position on an issue. We explain what we want and why what we want is reasonable and just. Our positions are usually rather specific.

Interests or underlying concerns are what sits within or under the position. Most people find it difficult to identify their interests as they tend to be elusive. They are connected to our hopes and dreams, our fears and anxieties. At times we resist exposing them because we fear we will not get what we want in the situation. We fear that letting others know will make us vulnerable.

Our positions are what we want. Our positive underlying interest is what we need. As in "We want the parish to have ten minutes of silence in the Sunday Eucharist" vs "We need less rush and business in our lives; more calmness and stillness."

To figure out the positive underlying concerns in a disagreement

You might begin with yourself. Look for your own interests. What is your longing or fear in the situation? Understanding your own concerns are just as important as understanding those of others.

Early in this process I invited people to share what they got out of having more silence and stillness? I repeated that invitation each time they discussed it. Over time they increased their skill at sorting out positions and positive underlying concerns.

To identify the interests of the others you need to do things such as:

Ask them what is the concern under or within the position they are taking. "I understand that you'd like more silence in the liturgy. Could you share what impact such silence has on you?" You're not asking for the person to make a case for their position. You're trying to understand their needs in the situation.
The stance needs to be empathetic. You are trying to understand the person's hopes, fears, anxieties, and needs.
It may help to ask open ended questions or about feelings – "Will you share how silence sometimes cause anxiety in you and at others times peace?" or "What do you think will happen if we increase the amount of silence and stillness?"
Be especially alert for basic needs being expressed – safety, sense of belonging, impact on relationships, issues of personal or parish identity and integrity, sense of accomplishment and competence, a longing for holiness and wholeness of life.

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Stepping aside from positions and looking for our positive underlying interests

By focusing on positions we tend to set ourselves up for a win-lose outcome. Someone gets to have incense or they don't. Or maybe there is a compromise in which we use incense on major feast days and one or two seasons of the church year but not at other times. Compromise by definition means both parties walk away unhappy. Sometimes it's the best we can do but by its nature a compromise is an unstable solution. Because we want to be able to be together as a community we all need to accept the compromise. People remain dissatisfied and usually a time comes when the issue is reopened.

Collaboration is the path if we want both to get the issue off the table in the short term and also establish longer term stability while increasing trust and the abilities of leaders to manage differences. The skill at the center of that is our ability to identify our positive and underlying concerns and avoid jumping to a position. When the parties lock themselves into expecting a particular outcome it becomes much more difficult to keep conflict at a lower level and manage it effectively.

Seeking the positive underlying concern of each party involves empathy and a willingness to set aside for the time being our positions. If we are to collaborate and find or develop an approach that is more likely to be owned and sustainable in the parish we need to find within ourselves some degree of respect and love toward those with whom we disagree.

Robert A. Gallagher, 2015

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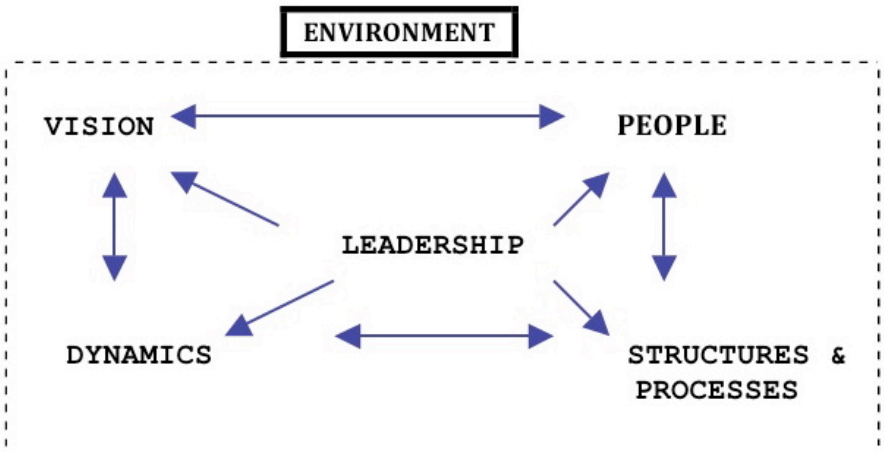
Organizational Diagnosis:
Six Primary Elements of the System

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

B. PEOPLE
1. Competence and commitment for the job and teamwork
2. Personality Type
3. Satisfaction with the job and the organization



C. DYNAMICS
1. Managing change & stability
2. Trust
3. Climate

D. STRUCTURES & PROCESSES
1. Adequate and appropriate resources for the task, e.g., technology, architecture, & space, etc.
2. Processes for effective information flow, problem solving, planning, conflict
3. Teams to carry out needed tasks
4. Effective linkages and cooperation between subsystems

E. LEADERSHIP
1. Ability to think and manage strategically
2. Ability to stay in touch with the system
3. Ability to set direction and enable movement

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

"FIT" – Not a system element in itself but the core issue to look at in relationship to the elements. To what extent do they fit together? The task is to identify areas of strong and poor alignment in the system.

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SHARED LEADERSHIP: The Maintaining of Task and Relationship Functions

Shared Leadership

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

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

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

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

Three Aspects of a Group's Life

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

Task – the group needs to accomplish some task, it needs to engage in behaviors that help it accomplish that task

Relationships – the group is a network of relationships; attending to relationship needs allows for both a more effective and more satisfying experience.

Individual Needs and Wants – each member of the group brings with them there own needs for acceptance, influence, and intimacy.

All groups have these three elements. They each require attention if the group is to be productive in its work and satisfying to its members. There is a tension among them. A group that is excessively task-oriented may be get the job done but may build up resentments among its members because relationship and individual needs are not adequately addressed. A group that is overly relationship -oriented may enjoy being together, but let its task drift. The most effective groups are those that learn how to attend to all three aspects of the group's life.

Task Functions

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

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

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

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

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

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

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

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

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

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

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

Relationship Functions

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

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

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

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

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

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

Individual Needs & Wants

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

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

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

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

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

Controlling or aggressive behavior - Intimidating other group members, stating a position in a way that brooks no opposition.
Condescending – Putting down the contributions of others
Blocking - Arguing too much on a point; rejecting ideas without considering them; resisting stubbornly, reiterating a point after it has been discussed and rejected, changing the subject or continuing to raise objections when the group attempts to settle on a decision.
Dominating - Asserting authority, status or superiority, excessive talking, interrupting or overriding others' comments.

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Avoiding - Ignoring relevant information, ideas and feelings.

Recognition seeking - Horseplay, recounting unrelated personal experiences, pontificating.
Withdrawal - Refusing to participate in group discussions, giving off non-verbal signals of disapproval or opposition; missing meetings; arriving late, leaving early
Pairing up – Creating a caucus within the group of people who protect and support one another while ignoring the relationship functions
Dependency – Counterdependency – A pattern of leaning on or resisting anyone in the group whom represents authority or expertise.

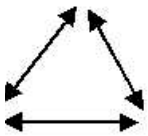
Robert A. Gallagher, 2001 This document is a revised version of earlier writings on group functions that has appeared in training manuals of MATC, LTI, NTL and other groups for many years

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.

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.

CONVERSTION 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.

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:

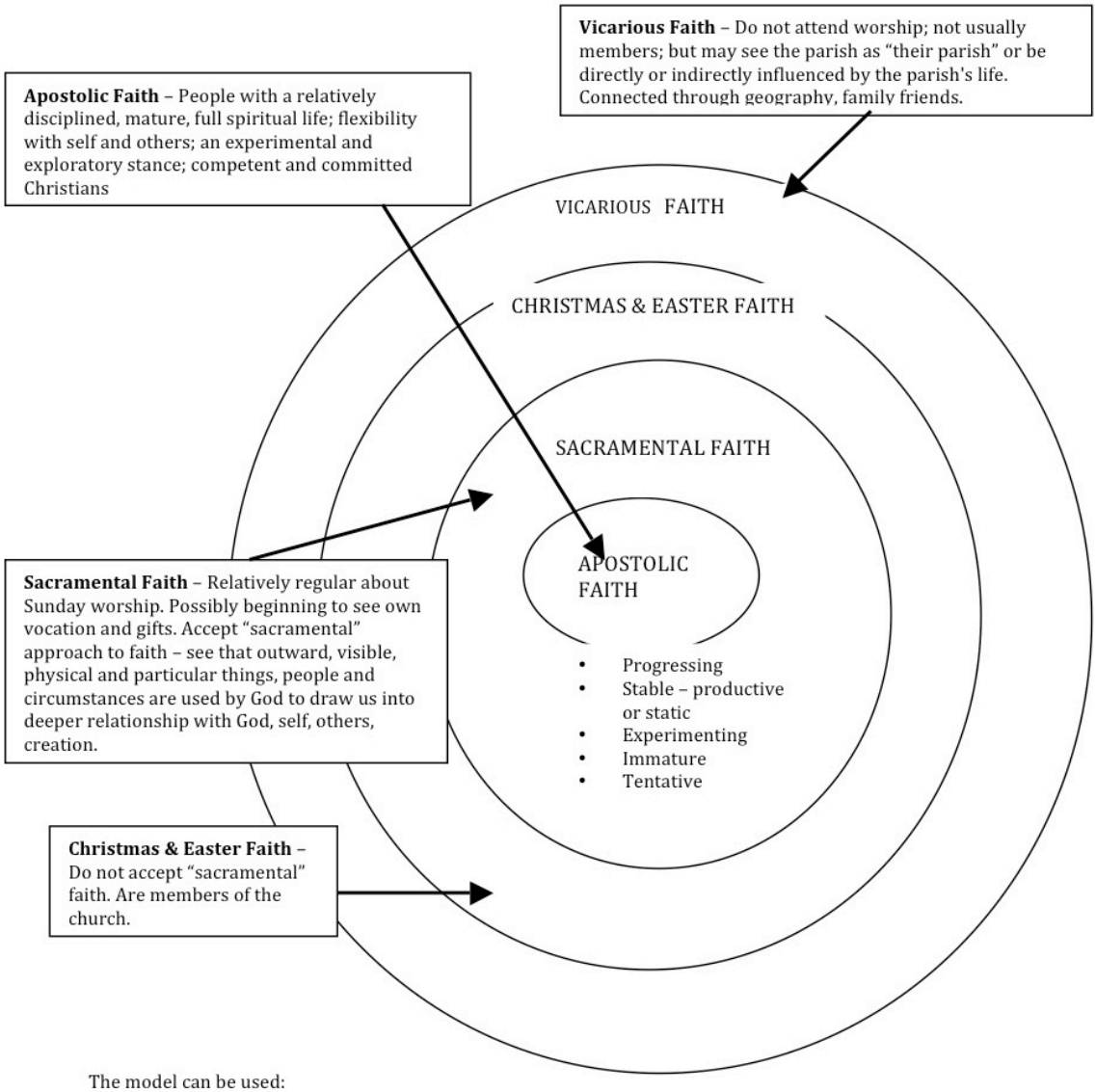
Stability – Especially seen in Liturgy, prayer and relationships.

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:

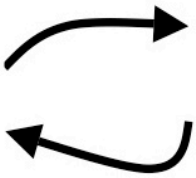
- To assess the health of a parish, and
- In developing a strategy that deepens the parish's spiritual life, while staying open the various places people are in their faith journey.

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
- Civic Life
- Family & Friends
- 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

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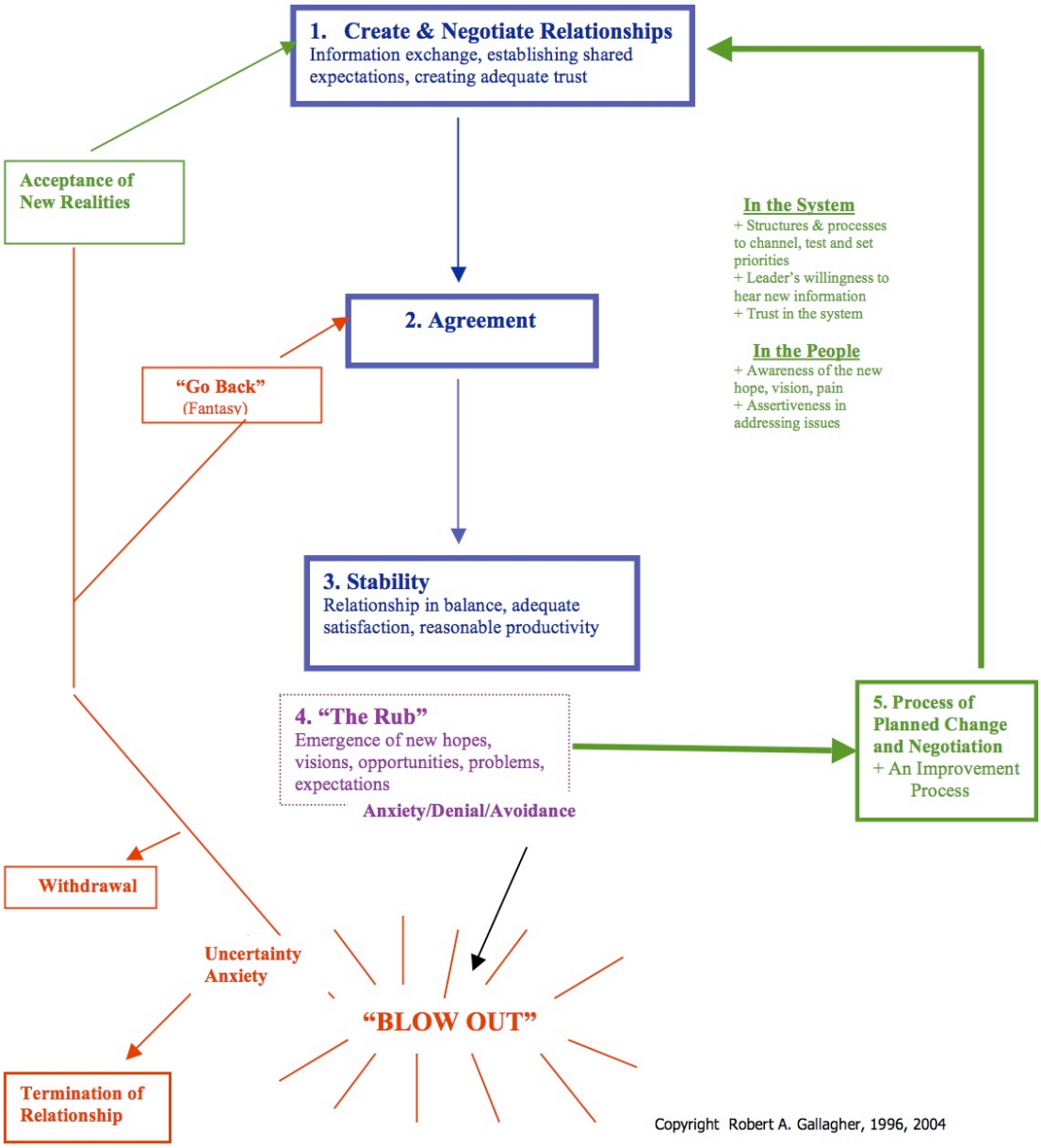
RELATIONSHIP CYCLE IN ORGANIZATIONS



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

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Quadrants Profile

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

IS	IN
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. David Hamiliton Lynn Warner David Smith Fred Thomas Kim Denhardt (IT)	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. Patty Downing (S) Betsy Chapin Ginny Wilder Janet Gorden (E)
ES	**EN**
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. Kathy VanDevender (T) Donald Copson	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!" Rick Carroll Kathryn Jakabcin (T)

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Team Profile: Temperament

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

SJ David Hamiliton	**SJ** Lynn Warner David Smith Fred Thomas Kim Denhardt (IT)	**NF** Patty Downing (S) Ginny Wilder	**NT** Betsy Chapin Janet Gorden (E)
SP	**SP**	**NF**	**NT**
SP	**SP**	**NF**	**NT**
SJ	**SJ** Kathy VanDevender (T) Donald Copson	**NF** Kathryn Jakabcin (T)	**NT** Rick Carroll

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.

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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**
What steps are needed to get the job done? What will the cost be? What information is needed?	What will be the impact on people? What can be done to help people?	Who will be involved in the decision making? What are our core values in this work?	What new ways of approaching this are available? What are related theories and models?
David Hamiliton	Lynn Warner David SmithKathy VanDevender (T) Donald Copson Fred Thomas Kim Denhardt (IT)	Patty Downing (S) Kathryn Jakabcin (T) Ginny Wilder	Rick Carroll Betsy Chapin Janet Gorden (E)

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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?

ISTJ David Hamiliton	***ISFJ*** Lynn Warner David Smith Fred Thomas Kim Denhardt (IT)	**INFJ** Patty Downing (S) Ginny Wilder	**INTJ** Betsy Chapin Janet Gorden (E)
ISTP	**ISFP**	**INFP** [Michelle Heyne Bob Gallagher]	**INTP**
ESTP	***ESFP***	**ENFP**	**ENTP**
ESTJ	**ESFJ** Kathy VanDevender (T) Donald Copson	**ENFJ** Kathryn Jakabcin (T)	**ENTJ** Rick Carroll

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

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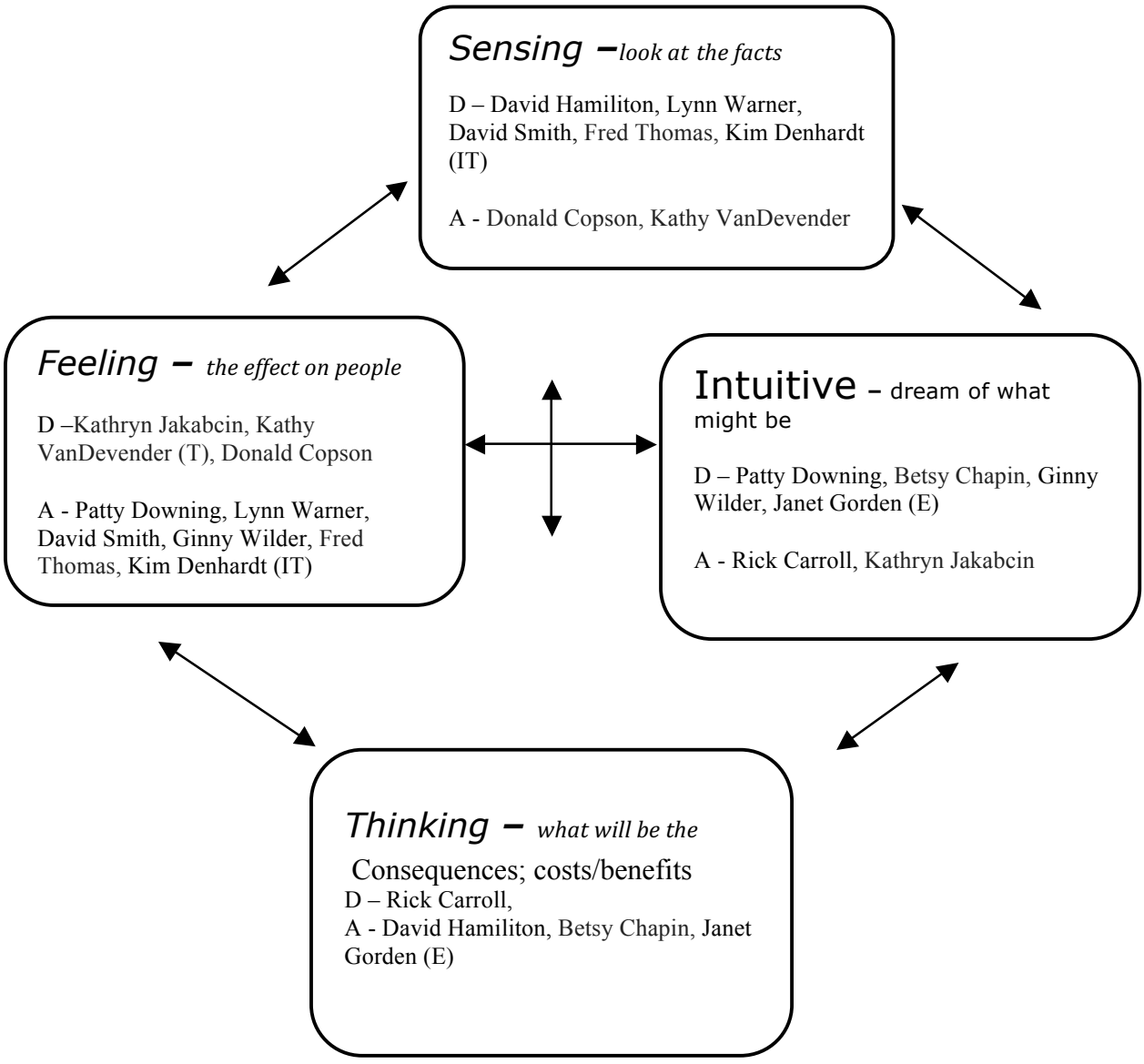
Team Profile: Decision Making

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?



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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

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

Type – Vestry 2015

Trinity 2015 Vestry

E - 4 I – 9 S – 7 N – 6 T- 4 F – 9 P- 0 J- 13

Notes – information missing for one member. Several scoring F are close on T

Therefore Organizational Character:
-- by the numbers - IFJ
-- by clergy leadership – INFJ

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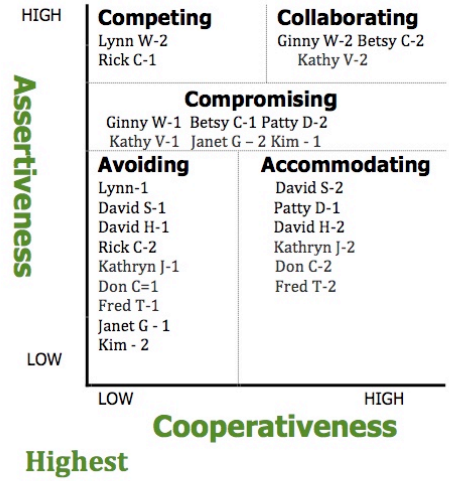
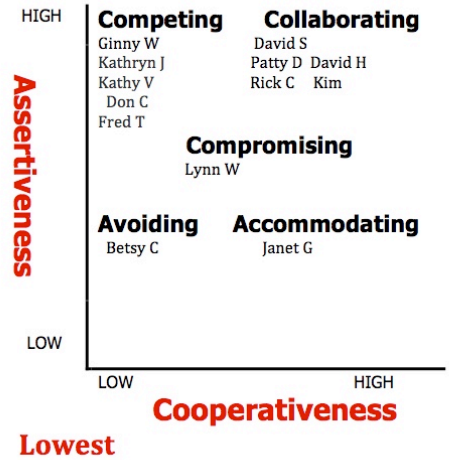
Trinity Vestry Conflict Styles Oct 2015: Two basic aspects of all conflict handling styles



Highest



Lowest

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.

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