Training for Interim Ministry
Diocese of New Westminster

Facilitated by Bishop Melissa Skelton and
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Process Consultation Revisited: Building the Helping Relationship

Edgar H. Schein

Process Consultation and the Helping Relationship in Perspective

In this chapter I want to summarize, comment on and reflect on what has come before. Some of the questions I want to address were stimulated by the detailed feedback from my colleagues, Otto Scharmer and his wife Katrin, who read the manuscript carefully and thoughtfully. I am grateful for their suggestions. I also benefited greatly from the reviews of our colleagues—Dick Beckhard, Warner Burke, Michael Brimm, and David Coghlan. Their thoughts and suggestions have been incorporated into this volume and have strengthened it greatly. What then is to be said in a concluding chapter? First, I want to revisit the ten principles of process consultation because I find them increasingly helpful as a diagnostic of where I have gone wrong when things do not work out as I expected them to. Then, I want to take up some remaining issues, especially pertaining to the teaching of process consultation.

Ten Principles as the Essence of Process Consultation

In reflecting on process consultation and the building of a "helping relationship," the question arises: where is the emphasis or the essence that makes this philosophy of helping "different"? Why bother to learn all of this stuff? In my reflections on some 40 years of practicing "this stuff," I have concluded that the essence is in the word *relationship*. To put it bluntly, I have come to believe that *the decisive factor as to whether or not help will occur in human situations involving personality, group dynamics, and culture is the relationship between the helper and the person, group, or organization that needs help*. From that point of view, every action I take, from the beginning contact with a client, should be an intervention that simultaneously allows both the client and me to diagnose what is going on and that builds a relationship between us. When all is said and done, I measure my success in every contact by whether or not I feel the relationship has been helpful and whether or not the client feels helped. Let us review the principles from that point of view.

1. ***Always try to be helpful.***

Obviously, if I have no intention of being helpful and hardworking at it, it is unlikely to lead to a helping relationship. I have found in all human relationships that the intention to be helpful is the best guarantee of a relationship that is rewarding and leads to mutual learning.

2. ***Always stay in touch with the current reality***.

I cannot be helpful if I cannot decipher what is going on in myself, in the situation, and in the client.

3. ***Access your ignorance***.

The only way I can discover my own inner reality is to learn to distinguish what I know from what I assume I know from what I truly do not know. And I have learned from experience that it is generally most helpful to work on those areas where I truly do not know. Accessing is the key, in the sense that I have learned that to overcome expectations and assumptions I must make an effort to locate within myself what I really do not know and should be asking about. It is like scanning my own inner database and gaining access to empty compartments. If I truly do not know the answer, I am more likely to sound congruent and sincere when I ask about it.

4. ***Everything you do is an intervention***.

Just as every interaction reveals diagnostic information, so does every interaction have consequences both for the client and me. I, therefore, have to own everything I do and assess the consequences to be sure that they fit my goals of creating a helping relationship.

5. ***It is the client who owns the problem and the solution***.

My job is to create a relationship in which the client can get help. It is not my job to take the client's problems onto my own shoulders, nor is it my job to offer advice and solutions in a situation that I do not live in myself.

6. *Go with the flow*.
Inasmuch as I do not know the client's reality, I must respect as much as possible the natural flow in that reality and not impose my own sense of flow on an unknown situation. Once the relationship reaches a certain level of trust, and once the client and helper have a shared set of insights into what is going on, flow itself becomes a shared process.

7. *Timing is crucial*.
Over and over I have learned that the introduction of my perspective, the asking of a clarifying question, the suggestion of alternatives, or whatever else I want to introduce from my own point of view, has to be timed to those moments when the client's attention is available. The same remark uttered at two different times can have completely different results.

8. *Be constructively opportunistic with confrontational interventions*.
When the client signals a moment of openness, a moment when his or her attention to a new input appears to be available, I find I seize those moments and try to make the most of them. In listening for those moments, I find it most important to look for areas in which I can build on the client's strengths and positive motivations. Those moments also occur when the client has revealed some data signifying readiness to pay attention to a new point of view.

9. *Everything is a source of data; errors are inevitable—learn from them*.
No matter how well I observe the previous principles I will say and do things that produce unexpected and undesirable reactions in the client. I must learn from them and at all costs avoid defensiveness, shame, or guilt. I can never know enough of the client's reality to avoid errors, but each error produces reactions from which I can learn a great deal about my own and the client's reality.

10. *When in doubt, share the problem*.
Inevitably, there will be times in the relationship when I run out of gas, don't know what to do next, feel frustrated, and in other ways get paralyzed. In situations like this, I found that the most helpful thing I could do was to share my "problem" with the client. Why should I assume that I always know what to do next? Inasmuch as it is the client's problem and reality we are dealing with, it is entirely appropriate for me to involve the client in my own efforts to be helpful.

These principles do not tell me what to do. Rather, they are reminders of how to think about the situation I am in. They offer guidelines when the situation is a bit ambiguous. Also they remind me of what it is I am trying to do.

Can One Develop a Useful Typology of Interventions?
In previous versions of this book I attempted to categorize interventions. As I reflect on possible ways to do this, I have concluded that such categories are not really useful because they divert one from the more fundamental question of figuring out what will be helpful at any given moment in the evolving relationship. I prefer a general concept of *"Facilitative Intervention"* that implies that the consultant should always select whatever intervention will be most helpful at any given moment, given all one knows about the total situation. Certainly the consultant should be familiar with a variety of questions, exercises, survey-feedback technologies, and other forms of intervention many of which have been illustrated in the previous chapters and well described in other books on organization development. But knowledge of many different kinds of interventions do not substitute for the know-how of sensing what is needed "right now" in terms of facilitating forward movement in the relationship. In fact, having a skill set of interventions "at the ready" makes it harder to stay in the current reality because one is always looking for opportunities to use what one believes oneself to

be good at. As the saying goes, if all you have is a hammer, everything in the world looks like a nail. What then is the *essential skill* we are talking about?

Formal Knowledge, Skill, or Tacit Know-How?

When I conduct workshops on process consultation, I am often reminded that much of what I suggest to young consultants may work for *me* because of my experience and stature, but it would not work for them. This issue has two components. What exactly do I have that they assume they do not have? And how much of what is relevant to creating a helping relationship is explicit formal knowledge, skill based on formal training, or tacit know-how based on experience? The reader will have noticed that I did not distinguish these three levels of knowledge throughout the previous text. The reason is that all three are relevant to the creation of a helping relationship. Formal knowledge, such as the simplifying models presented in several of the chapters, is essential. It is especially important for the budding consultant to understand as much as possible about psychology, group dynamics, and organizational dynamics. But formal knowledge is clearly not enough. With workshop training, apprenticeships, and actual trial and error one develops the skill and—most important—the know-how that gradually becomes tacit and automatic. It is in the last two categories of knowledge that I clearly have an advantage over the novice, but I always point out that if an essential element of the philosophy is to deal with reality, then the novice must work from his reality, whatever that implies. Let me illustrate. If I am working with a manager who is familiar with my work, I know that she understands that I am supposedly expert in this form of consultation. I must appreciate that set of perceptions and make my interventions accordingly. If a younger, novice consultant goes to that same manager, he knows that the manager is relatively unfamiliar with the consultant's experience or skill, and he must therefore operate from that reality. Consequently, we would make quite different interventions, but we each would be trying to build a helping relationship, and we each could succeed. The relationship might evolve differently, but there is nothing in each of our experiences that would automatically determine that I would be more successful than the novice. When I have observed novices in these situations, their lack of success is invariably connected to not sticking to the principles, of trying to be prematurely expert, or of giving advice when none was called for. Of course, those errors themselves are the result of lack of experience; but this does not invalidate the principles. If the novice does stay in the helper role, if he stays focused on what has been described here, he will be just as successful as I would be in the same situation.

I have observed this over and over again in my classes on managing planned change where project groups are from time to time trying to help each other with their projects. If I play the role of consultant, I can help, but—more importantly—when I encourage fellow students to try their hand at being helpful, the ones who operate by these principles are as or more helpful than I could have been. It is their insight that is crucial, not their length of experience. It is their willingness to give up the expert role and deal with current reality that is crucial, not how many hours of practice they have had. It must also be acknowledged that the helping relationship is a product of two personality styles. Two equally experienced consultants might produce two quite different kinds of relationships, each of which would be helpful. It is not accidental that a number of my clients did not want to proceed only on the basis of what contact clients had told them about me. They wanted to meet me and test the "chemistry" between us for themselves. From that point of view, in any relationship, a novice with the right chemistry could do as well or better than an experienced consultant with the wrong chemistry.

In conclusion, tacit know-how and skill are important even when the novice consultant has some history of human experiences to draw on. Lack of experience is not nearly as predictive of problems as is not understanding what it means to help someone and not doing one's best to operate by those principles.

A Concluding Personal Note

I sometimes ask myself why I am so passionate about preaching the stuff. My experience has taught me some lessons that I want others to understand. In watching my own helping efforts, and especially in observing the helping efforts of others, I keep rediscovering the same simple truths. We have learned much about these truths in related fields—psychotherapy, social work, teaching, coaching. Yet we persist in treating organizational consultation as something different. Consultants tell me over and over how important it is to make a formal diagnosis, to write reports, to make specific recommendations, or they feel they have not done their job.

I cannot really figure out why the learning we have acquired in the other helping professions about client involvement, about people having to learn at their own pace, about helping clients to have insights and solve their problems—has not generalized more to the field of management and organizational consulting. If I take a cynical view, I think it is easier to sell products, programs, diagnoses, and sets of recommendations than it is to sell a helping attitude. Consulting firms are businesses and they must survive financially, so there is inevitably a great pressure to have products and services that clients are willing to pay money for. However, once consulting becomes a business, I believe it ceases to be consulting in the sense I mean it. It becomes transformed into the sale of some expert services. Consulting firms sell information, ideas, and recommendations. But do they sell help? For me that is the tough question. Helpers also have to make a living and charge for the services. But therapists and social workers do not define their work at the outset in terms of specific longer-range projects involving formal diagnostic methods and formal programs of therapy. They first build a relationship and only recommend other services as they decide jointly with their client that something else is needed. What I find missing in so much managerial and organizational consulting is that initial relationship-building that would permit clients to own their problems and make sensible decisions about whether or not to do a survey, or have an off-site confrontation meeting, or engage in a two year formal change program run by the consulting firm.

The strength of my feeling about the need to build a relationship first derives from the experience of working with organizations that have previously been subjected to an expert consultant who had formal programs to implement. As a result, I have to confront again my own reality that help will not happen until the kind of relationship has been built with the various levels of clients we may have to deal with, and that the building of such a relationship takes time and requires a certain kind of attitude from the helper. In the end, then, this book is an attempt to articulate what that attitude is all about.

Edgar H.Schein (1999) *Process Consultation Revisited. Building the Helping Relationship* Addison–Wesley Publishing Inc.: Reading, MA

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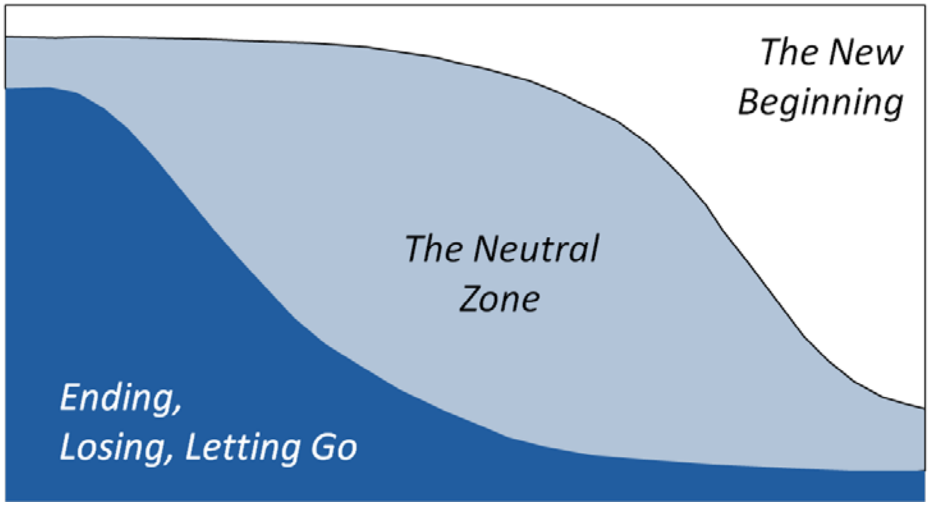
Change, Transition and its Stages from the work of William Bridges



Change happens. Change is not only the path ahead, it is the path behind us, the one we traveled along to wherever we are now trying to stay.

Transition is the process of letting go of the way things used to be and then taking hold of the way they subsequently become. Transition refers to the actual passage or movement from one place to another. Without transition a change is mechanical, superficial and empty. Transition takes time. We often resist it because it means we have to let go of something cherished and familiar, because it takes time and is uncomfortable and painful and because it reminds us of other losses that were painful for us.

Bridges identifies three phases within transitions

Ending
Every change begins with an ending. Something that was, it no longer, or somebody or something we counted on is gone. We lose or let go of an old outlook, our old reality, our old attitudes, our old values, our old self-image. Our natural tendency is to resist and try to hang onto the past. With any ending we often have feelings of anger, sadness or grief.

The Neutral Zone
After letting go of the past, we do not have anything certain to grab on to. We are neither in the past or in the future. This confusing state is a time when our lives feel as though they have broken apart or gone dead. We get mixed signals, some from our old way of being and some from a way of being that is still unclear to us. Nothing feels solid. Everything feels up for grabs. Yet, for that very reason, it is a time when we sometimes feel that anything is possible. So the in-between time can be a very creative time too. Bridges himself likened it to the wilderness wandering of the Jewish people after their flight from Egypt.

Beginning
Though it may feel strange and uncomfortable at first, we finally take hold of and identify some new outlook or reality as well as the new attitudes and self-image that accompany it. When we have done this we are finally starting a new chapter. No matter how impossible it was to imagine a new chapter in our lives earlier, now life feels as though it is back on track again. We have a new sense of ourselves, a new outlook, and a new sense of purpose and possibility.

Transition Apparitions: Why Much of What We Know about Pastoral Transitions is Wrong

Russ Crabtree (Magi Press, 2015)

Background to Russ Crabtree's take on interim ministry

- An innovation that come with the development of interim ministry was a focus on the actual thoughts and feelings of members: experience matters (not just count data: people, dollars, and facilities)
- The frame for understanding the experience of transition has been Elizabeth Kubler-Ross's stages of grief
- Despite the attention to member experience, there has not been an effective and consistent means to assess this member experience.
- Holy Cow Consulting, using the Congregational Assessment Tool (CAT), has significant findings on member experience. They have analyzed responses from churches prior to transition (662 churches with 82,000 members, churches entering transition (177 churches with 30,000 members), and churches with interim clergy (74 churches with 10,000 members)

Assumption about Parishes in Interim/ Transition	**Reality as identified by the Congregational Assessment Tool (CAT)**
Pastoral transition traumatize congregations like the death of a spouse (initial depression followed by recovery)	A congregation's reaction is not the same as with the death of a spouse. Rather, the climate and vitality of the organization continue to erode and this accelerates over time. The primary impact of entering a transition is a feeling of "wait and see," uncertainty rather than pain or negativity.
After an initial trauma, churches gradually recover under interim clergy	If action isn't taken, uncertainty and ambivalence erodes into a negative climate. There is a decline in morale. Satisfaction and energy decline.
Poor performance by interim clergy is the primary reason churches have difficult pastoral transitions	Congregation rate interim clergy the same or better in communication and listening as permanent clergy. They rate interim clergy slightly lower in preaching (more express being "on the fence" in terms of their satisfaction with interim clergy preaching).
Conflict levels go down	When focusing on members' experience of conflict, the CAT assessment found that conflict increases in a prolonged transition
Members have no good reason to be impatient to get through the interim; they are "anxious" for no cause	Congregations loose members and revenue at an increasing rate during transitions. Half of the increase in conflict levels in churches in transition are because of factors within the transition process itself
We don't know why members explore other churches during transitions	Members explore other churches during transitions because • They feel burned out, undeveloped, underappreciates in their current faith community • They are concerned about the quality of relationships • They want more Christian education Sometimes is it because they are concerned about • The atmosphere in the church • The way leaders and members engage one another • The way conflict and disagreement is handled
Members don't want to do more during the transition	In the early stages of transition, members frequently want to participate; however, with no ability to exert influence, this desire wanes.

Crabtree's Learning Coaching Tips on Transition Times

Crabtree's research suggests that **the primary issues in any time of transition** are:

1. **"state uncertainty"** that is members cannot answer the question : "What kind of experiences are our members having in our church? What are the perspectives of our members on issues within the church? What are the aspirations of our members for the church's future?"

2. **"effect uncertainty"** that is , the inability of members to understand the causes of certain events, to answer the question: "Why? Why did the last priest resign?" or if there has been a series of repeated events/failures in the calling of priests, "Why does this keep happening to us?" Other "why" questions are "Why is the call process taking so long?" What are other churches growing and we are not?" Why are people leaving?" "Why is giving down?"

3. **"result uncertainty,"** that is, the inability of members to predict the consequences of specific actions, to answer the question "what if?" Some of the questions are "What if we have a long-term interim—will that help us get ready for the next priest or will it cause us to lose momentum?" "What if we call a younger priest—will that help us attract young families?"

During a protracted transition period (2 or more years), all of these uncertainties increase.

One of the ways to help people deal with uncertainty is increasing people's sense of agency—that is, the ability to exert influence in order to reach certain goals. Crabtree believes there are three elements to agency: transparency, predictability and influence.

- **Transparency**—is access to information that describes the entire system or an important subgroup in that system, information that gives people information about the whole (e.g. the Church Assessment Tool or other tools for important subgroups). I would also add here—access to information about what is going on in the transition—process, who is doing what, how is the parish to be kept informed (all the different ways) etc.

- **Predictability**—confidence that a particular course of action will have a desired result. Formulating specific goals and specific plans and communicating them (even if they have to be modified a bit as time goes on). Also helps people participate and engage.

- **Influence**—the capacity to affect things. Though some may not want to serve in a governance or a search (canonical) committee role, the research suggests that many (on average over a third) want to play a supportive role in the transition. Engaging as many of these as possible in a variety of meaningful roles helps people deal with uncertainty.

Based on these learnings, Crabtree recommends that during the transition time:

1. Provide opportunities for as many "leaders" as possible to participate in the transition process. These would include not only the governance of the parish but also staff members, other groups, committees or teams, lay ministers, past leaders. This not only increases people's sense of influence and encourages teamwork, it also reduces polarization.

2. Collect "organizational intelligence" that gives insight into where the entire parish is as well as where significant subgroups are (governing groups and staff). This reduces "state anxiety" and can feed into goals and

3. Formulate a vision for the transition and develop concrete goals for the parish in the areas of transition, search, start up etc., and communicate at every opportunity what the vision is and where things are in the vision, on the timeline, in the process. Do this in writing, in meetings, at events, on the website etc. etc. etc. This provides a sense of predictability (setting goals and achieving them) and a positive, collaborative experience for the leadership body and others.

The Seven Tasks of the Interim Period

Based on Russ Crabtree's research and Diocesan priorities, this training proposes that throughout the period of interim ministry, the interim priest has seven main tasks.

ONE: Increasing parishioners' sense of predictability

Work on this begins **within first month of the interim** and sets the stage for the rest of the interim. Practical ways to do this involved goal setting, developing a vision for the interim period, and surfacing shared expectations between clergy and lay leaders.

Working with wardens and parish council, the interim priest initiates

a. **Initial goal setting.** One way to do this would be to present the seven tasks, and invite lay leaders to identify the most pressing priorities as they present in the parish. For example, parish leaders may wish to pay particular attention to regular communication related to where things stand in the interim process, the search, etc. They may wish to focus on the quality of Sunday morning. Or, they may wish to focus energy on bringing practices into alignment with Diocesan policy and practice. In some instances, the Interim priest will need to initiate a priority if vulnerable people are at risk, such as instituting safe church.

   About six months into the interim period is a good time to check back in about the priorities and make adjustments as required.

b. **A vision for interim.** In formal and informal conversation with parishioners, the interim priest should identify a Biblical story or image, a story or image from the tradition, or a story or image from the history of the parish that will help parishioners make sense of the current transitional state of the parish. This story or image can be used in preaching, in prayers, and in conversation.

c. **Shared expectations** between interim and wardens (see instructions in this manual).

TWO: Building relationships between the interim priest and the parish and especially among parishioners with each other

Throughout the whole interim period, the priest will nurture relationships

d. Between interim and people, leaders, staff
e. Amongst people
f. At coffee hour, in meetings.

Practical ways to do this include town hall meetings (can be as short at 30 minutes) using various data gathering exercises such as Preferred Styles—Four Corners. One-on-one pastoral visits, while effective at cultivating relationships between clergy and parishioners, do not have the added benefit of helping members get to each other and the whole community better. Use your time wisely!

THREE: Bringing practices into alignment—where important and essential—when it comes to Diocesan policy and practice (also called "norming").

This is a priority for the duration of the interim contract. It involves

a. Bringing the parish closer to Diocesan policy and practice. Particular areas of focus include Safe Church, liturgy, governance, stewardship and finances.
b. Strengthening the relationship with Diocese; for example, being in conversation with Diocesan leaders such as the Bishop, Archdeacon, staff
c. Calling on your Archdeacon or diocesan resources for support

This priority can be sensitive to manage. How do you decide what to focus on? Be judicious: Ask yourself whether there is there risk to vulnerable people, can something be adjusted easily (low hanging fruit), or can you achieve it in the time you have available?

FOUR: Helping the parish get in touch with its story (data-gathering)

This priority needs the most intense and formal focus in the first six months. Attention to this area will promote relationships (see priority number two) and is critical for generating content for the parish profile. In that it is directly related to most parishioners' desire to move quickly into the canonical process, it should receive a reasonable degree of support from lay leaders.

Who does it? A small team including the interim priest and lay leaders. Some of the people who will serve on the Canonical Committee can serve of this team to improve continuity, and members with special skills, aptitude, and knowledge of the parish can also be recruited.

You do not have to make anything up for this work: There are many resources to support this priority, including bringing in a member of the Diocesan consulting group. Consultants are experienced facilitators who provide the added benefit of allowing clergy to observe participants and learn more about the parish.

Bishop Melissa has identified five questions to guide the data gathering (see also handout, page XX)

1. What do the parish and the parish's leaders most value/appreciate about the parish? Building on this, how would you describe the parish's identity—what does it uniquely offer its members and prospective members?
2. What are the challenges that the parish faces and what is an approach to meet these challenges?
3. What sense do parish leaders or the parish make of any difficult or troubling events/happenings/patterns in the parish? What insights have been gleaned from engaging those areas of the parish's story that are difficult to talk about but have a lingering effect on the parish, its people and its choices?
4. What are the limited number of goals that the parish desires to pursue over the next 2-3 years? These goals should have *both* to do with the ministry of the parish and the ways in which the parish will nurture its people in the Christian faith and life. What needs to be built upon, improved or initiated in the next 2-3 years?
5. What are the qualities and experience that the parish desires in its next incumbent that will assist the parish in meeting the above goals?

You may also have a hunch about other areas that parishioners would benefit from examining collectively.

FIVE: Activating participation
Activating participation needs attention throughout whole interim period. It is in direct response to the desire for greater involvement at the start of a transition that Russell Crabtree identified. Encouraging members to participate increases their capacity to influence the outcome and encourages teamwork.

SIX: Increasing transparency
A focus on increasing transparency is needed throughout whole interim. It entails being transparent about how decisions are made, the stated of the finances, updates on the progress towards the canonical process and the search, and other items depending on the parish.

The usual communications channels are appropriate: email blasts/newsletters, announcements and the website.

This is an opportunity to bring lists up to date.

It should be led by lay leaders with support from interim clergy.

SEVEN: Maintaining or building the quality of the total Sunday morning experience
The Sunday morning experience needs attention throughout the whole interim period. Areas to explore include preaching, coffee hour, the liturgical space, music and lay leaders in worship (readers, intercessors, servers). Ask yourself: what might I do as interim clergy to make this as high quality as possible?

Mutual Ministry Review (adapted for Interim Ministry)

OBJECTIVE

An opportunity for Interim Priest and lay leaders to identify common goals for the interim ministry period. Answers the question "What should we focus on through this period of transition?"

TIME One 2 hour meeting

GROUP SIZE OR COMPOSITION Clergy, wardens, parish council/church committee

MATERIALS

Newsprint/flip chart paper
Markers
Painter's tape
Large Post-it notes (5" x 8" if available) (optional)

PROCESS

Preparation for the meeting: Participants think about on their experience of the parish in the previous three months and come to the meeting having reflected on

a. What they feel are the parish's gifts/strengths
b. What they feel are the important challenges before the parish during the interim

At the meeting:

a. Brief connecting exercise; go over purpose and design of meeting.
b. Participants share their thoughts about the parish's strengths, either by talking in pairs or in the whole group (if the group is small enough).
c. Facilitator elicits what members feel are the important challenges during the interim. (Use a go-round process, where each member speaks without interruption.)
d. Each person on their own writes three goals on big Post-it notes
e. Post on the wall; participants with help from the facilitator move the notes to cluster by themes, elaborating as necessary on what they mean
f. Participants discuss each cluster, coming up with a summary/short form of each area, written and placed in the middle of the cluster
g. Participants prioritize the top three goals. The top three goals chosen must have the endorsement of the clergy and a large number of the parish council/church committee.
h. Facilitator invites participants to look at the priorities among the actions and come up with specific expectations under each goal. Be sure to specify what actions are needed by the Interim Priest and the parish council and any others and timing if possible. The aim is to become quite specific and concrete.

> You might want to ask, "How are these priorities going to impact the Interim's work?" "How much time will she spend on these areas of focus every week?" These questions make the exercise more concrete and less likely to be shelved

Shared Expectations

OBJECTIVE

To establish common expectations between the Interim Priest and lay leaders at the beginning of the interim period, when there are new lay leaders (such as after Vestry), or when it would be helpful to clarify expectations. Identifies where expectations are aligned and where they are not, and therefore need further work.

TIME One meeting of about 1.5 hours

GROUP SIZE OR COMPOSITION Interim priest and wardens. Can include the treasurer if appropriate. It is also possible to use this process with parish council and Interim.

MATERIALS

Newsprint/flip chart paper
Markers
Painter's tape

PROCESS

1. Each party prepares two pieces of newsprint and writes the following at the top of the two pieces:

What I want/need from you	What I think you want/need from me

2. Both parties go to a separate space and use a brainstorming process to create a list of expectations each party has of the other as well as a list of what each party <u>believes</u> the other party wants or needs from him/her/them.

3. The two parties come back together, and post their newsprint sheets side by side, matching up the expectations and imagined expectations of each.

As an example

What the Parish Council wants/needs from the Interim.	What the Interim thinks the Parish Council wants/needs from her.	What the Interim wants/needs from the Parish Council.	What Parish Council thinks the Interim wants/needs from it.

4. Both parties review the lists together, identifying where expectations are in agreement and where they are not, negotiating any differences.

5. Both parties identify any next steps related to the conversation.

Methods for Engaging Parishioners in Telling Their Story

Handout from Caroline McCall, principal, Areté Consulting

Method	Benefits and When to Use	Limitations
Parish Survey	Easy to administer (on-line) Can reach large numbers of people Easy to synthesize and report (unless all open-ended questions) Use to get demographic information, when you need to have a large sample and when questions are easy to frame as yes/no, multiple choice, or ranking	Little room for interpretation beyond the specific response options Open-ended questions are difficult to synthesize and report No room for storytelling No community building or learning through the process unless review and reflection follow a presentation of survey results.
Small Group Meetings	Allows all voices who participate to be heard and tell stories Can modify format and questions based on responses, and allow conversation to deepen understanding of the issues at hand Builds community and offers opportunities for learning from one another in structured dialogue Use when exploring issues that demand more complex answers and dialogue and/or when building community is a desired outcome.	Time intensive to design, train facilitators and host meetings Can be logistically complicated Can limit the number of participants Participants hear from and engage with only those in their small group, which can be confusing if overall outcomes are not consistent with the specific group conversation
Representative Meeting or Survey (i.e. ministry leaders)	Assures representation from key groups and perspectives Builds accountability and ownership among leaders Use when issues are more complex	Assumes parish diversity can be adequately represented by a sub-set Builds on status quo for leadership and involvement
Full Parish Forum/Town Hall	Offers opportunity for all in parish to explore important issues together through stories. Builds community and offers opportunities for learning from one another Use to build a common story, test ideas, report back from survey or small groups and deepen understanding	Not all voices can be heard – those who are most comfortable in large groups are most likely to be heard. Good design and facilitation are critical Need to vary agenda to increase engagement.

Questions to be Explored, Responded to and Articulated During the Interim Period

The following are some basic questions that need exploring during the interim period in preparation for writing the profile and as a way to prepare the parish to receive its next incumbent in a healthy and engaged way.

1. What do the parish and the parish's leaders most value/appreciate about the parish? Building on this, how would you describe the parish's identity—what does it uniquely offer its members and prospective members?

2. What are the challenges that the parish faces and what is an approach to meet these challenges?

3. What sense do parish leaders or the parish make of any difficult or troubling events/happenings/patterns in the parish? What insights have been gleaned from engaging those areas of the parish's story that are difficult to talk about but have a lingering effect on the parish, its people and its choices?

4. What are the limited number of goals that the parish desires to pursue over the next 2-3 years? These goals should have *both* to do with the ministry of the parish and the ways in which the parish will nurture its people in the Christian faith and life. What needs to be built upon, improved or initiated in the next 2-3 years?

5. What are the qualities and experience that the parish desires in its next incumbent that will assist the parish in meeting the above goals?

Using Survey Feedback in a Town Hall

OBJECTIVE

An opportunity for clergy and members to learn about members' thoughts and feelings on a specific topic. Provides a quick snap shot.

TIME

One one-hour meeting, typically after the principal Sunday worship

GROUP SIZE OR COMPOSITION

Whole parish. Can also be used effectively with a small group

MATERIALS

Newsprint/flipchart paper
Markers
Painter's tape

PROCESS

Note: All times are approximate

1. Before the meeting, write up the survey questions on flipchart paper.
2. **Short introduction** explaining the purpose of the gathering: (about 5 mins)
   Include why this data is being collected and who will follow up

2. **Explain Survey Feedback** (5 mins)
   a. It's not scientific but is a way to quickly get a sense of how people feel about the subject
   b. The scores only make sense when the people who made them can explain what they were thinking
   c. Participants will complete short survey on the flipchart paper and then have a discussion about it

   Check for questions, comments

3. **Survey** (10 mins)
   (note: Hang the papers half folded so that people don't see the questions until you uncover them at this point. Have many markers ready; don't let people use pens, you can't see the mark)
   Read through survey; ask for questions for clarification; hand out markers and encourage people to come up and make their marks.
   Chart 1:
   Please indicate your level of agreement with the following questions:
   1 = strongly disagree
   2 = disagree
   3 = tend to disagree
   4 = tend to agree
   5 = agree
   6 = strongly agree
   NA = does not apply

Alternate question, On a scale of 1-6, how satisfied are you with…

4. **Discussion**: 10 mins? Depends on time available
    a. What do you see? Where are the marks? (No interpretation yet)
    b. Turn to your neighbour; in twos and threes, as you are comfortable, talk about why you put your marks where you did; what do you think this data suggests? (Note: chart these questions)

5. **Whole group discussion:** 5 mins? Depends on time available
    a. "I'd like to hear back from people. As you feel comfortable, can you share some of your discussion? (Note: If possible, ask someone to scribe on flipchart paper)

6. **Conclusion (5 mins)**
    a. Thank people for participating, sharing thoughts that are important.
    b. Remind participants of next steps: the group that will reflect on this discussion and how it will inform the interim process

Sample survey questions, based on the Sources of Transformation model

On a scale of 1 to 6, please indicate your level of agreement with the following statements:

Worship and Prayer

- The parish's Sunday Eucharist renews people for their Christian life in the world.
- The parish offers or equips its people to pray the Daily Office.
- The parish equips individual people to pray in a prayer style that works for them.

Action

- The parish equips its people to be faithful and effective stewards of all their resources (time, money, talent, the earth)
- The parish equips its people in sharing the good news of God in Christ with each other and with those outside its walls.
- The parish equips its people to serve each other and to serve others in the world.

Life in Community

- The parish offers opportunities for its people to just hang out together.
- The parish provides for silence in its life.
- The parish has listening processes as a part of its common life.

Study and Learning

- The parish provides adult Christian formation experiences that form the whole person (mind, heart, practice)
- The parish provides children's formation experiences that form the whole person (mind, heart, practice)

Preferred Styles—Four Corners

OBJECTIVE
An opportunity for clergy and members to learn about members' preferred working styles.

TIME
15 to 30 minutes, depending on the size of the group

GROUP SIZE OR COMPOSITION
Works well with many configurations, from small groups to the whole parish.

MATERIALS
Worksheet/handout (see next page)
Extra pens or pencils

PROCESS
1. Handout the worksheet. Invite participants to complete it. (About 5 to 10 minutes)
2. Invite participants to sit in groups of about four people and compare their responses (5 to 10 minutes)
3. Invite participants to move to the four corners of the room according to their preferences. Invite them to compare their responses to one or two questions (for example, questions 1 and 2 or question 4), depending on what you think would be the most fruitful discussion (5 minutes).
4. Invite everyone to resume their seats.
5. Conclude with a brief whole group conversation. Some possible questions are: What, if anything, did you learn from this exercise? Do you think this will change how you perceive your fellow parishioners? Or some other question along these lines. (2 minutes)

Note for smaller groups: If you are doing this with a small group (such as parish council), skip step 2 and move directly to the corners. When participants resume their seats, have a fuller conversation about preferences.

What's Your Preferred Style?

Action: Just do it!

Meaning: Imagine, generate, create.

Caring: We need to consider feelings!

Structure: Who, what, when, where?

Circle your preferred style.

1. What are the strengths of your style?

2. What are the limitations of your style?

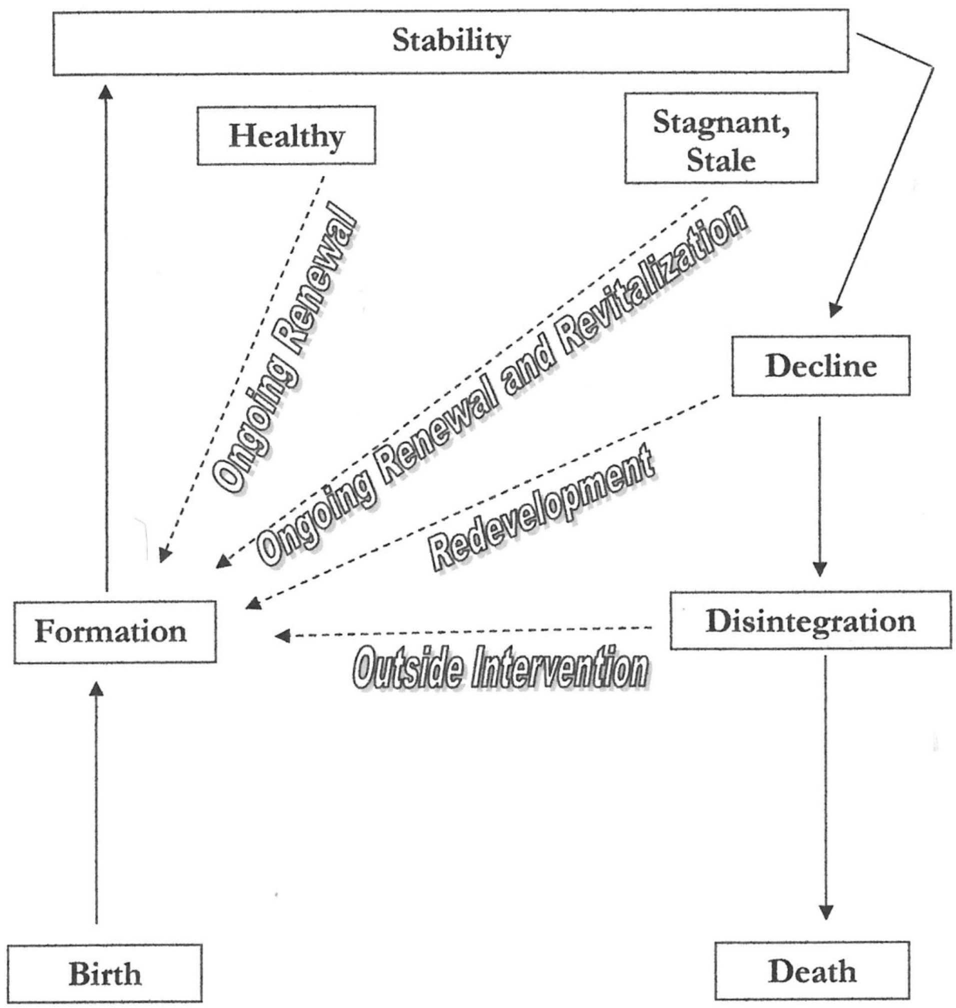
3. With which styles is it difficult for you to work and why?

4. What do the other styles need to know about you so that you can all work together most effectively?

5. If you had to guess about your parish council/church committee, what preference(s), if any, would you say is dominant? What are the resulting strengths and the limitations of this (these) preference(s)?

Life Cycle of Organizations

Adapted from Alice Mann's *Can Our Church Live: Redeveloping Congregations in Decline*



Birth: A founder or founders, an idea, a dream

Formation: Identity, Who are we (at the faith level)? What are we here for? Who is our neighbor and how are we related to our neighbor?

Stability: Fruitful and sustainable ministry, institutionally and spiritually. A time when the elements of organizational life fit together (money, vision for ministry, property, people), this can be a **place of health** or can tip into feeling **stagnant or stale,** with growth stalling and new opportunities being ignored. Sometimes experienced as a membership plateau followed by declining numbers.

Decline: Numbers fall off, energy declines, fear and blame in the system, confusion, focus on small things rather than central issues.

Disintegration: Conflict, hopelessness, feeling stuck, internal leaders unable to effect change

Congregational Renewal and Redevelopment

The hour has come for the Son of Man to be glorified. Very truly, I tell you, unless a grain of wheat falls into the earth and dies it remains a single grain; but if it dies, it bears much fruit. (John 12:23-24)

Healthy Stability and Ongoing Renewal

Healthy stable congregations stay healthy either through leadership that instinctively raises and acts on formation-related questions in the overall congregation or through processes that continue to renew the entire congregation or important parts of the congregation that need attention. Some leaders organically recognize and act on areas in a congregation that need improvement; some leaders/congregations have in place processes that scan the life of the congregation, listen for and act on areas that need improvement.

Stale, Stagnant Stability and Renewal/Revitalization

When stability becomes stale and stagnant, a congregation and its leadership will need in a more focused way to take a look at formation questions: Who are we? (identity) What are we here for? (purpose) Who is our neighbor? (context). These are typically system-wide interventions that when done skillfully also introduce and teach the congregation language and models or frameworks that help to focus the discussion. Sometimes the self-study before the calling of a new rector can be the context in which some of this work is done.

Decline and Redevelopment

The further down the path a congregation goes in declining numbers, finances, energy and flexibility, the more costly it becomes for a congregation to engage the formation questions that have the potential to activate what it will take to return to formation. Redevelopment is a possibility when serious declines have occurred in a congregation, but significant effort will be needed to increase the likelihood that redevelopment efforts will bear fruit. Often third-party help or a dramatic change in leadership is needed to face the situation, to let go of old patterns of doing things and to face into what will be needed to turn things around.

Disintegration and Outside Intervention

When disintegration begins and things begin to fall apart, conflict or paralysis can set in. At this point a diocese will often intervene, taking charge of the decisions in that there is no internal capacity to do what may be needed.

Writing the Story of St. Swithin's in Four (or Five) Chapters

OBJECTIVE

This exercise entails a large group of people exploring their subjective recollections of their parish's founding, the best times, the most difficult times and their current circumstances. Having completed this process, participants will gain a better understanding of some of their own assumptions and greater insight into others' experiences. Newer members of the parish will learn stories from before their time. It is possible that stories will emerge that help parish leaders in understand or bolster different aspects of community life, such as stories of resilience in difficult times, or past examples of community engagement.

The underlying principle is that a community that understands its history will have a greater capacity for engaging the future.

TIME
About 2 hours; more if adding the Fifth Chapter

MATERIALS

Newsprint/flipchart paper
Markers
Painter's tape

PROCESS

1. Participants divide into small groups with as much diversity as possible within each group. You may need to ask how many people have been with the parish over 20 years, 10 years, 5 years and less than 5 years and move people around to get diversity.

2. Each group is given four sheets of flipchart papers and several markers. Their task is to "write the history" of the parish in four chapters, using one piece of flipchart paper per chapter. The chapter headings are
   Chapter 1. The Beginning
   Chapter 2. The Glory Days
   Chapter 3. The Difficult Times
   Chapter 4. St. Swithin's Today

   Let them know that they will be presenting their stories to the whole group. You should allow for about 10 minutes for people to get organized and then they have 60 minutes for this process and can decide how they want to use their time. They can express their stories using words or pictures, poetry or prose.

3. Once the four chapters are written, each group presents their stories to the whole group. You may want to say a few words about safe space before presentations. For example, "Sometimes, exercises

like these can bring up a lot of emotion. We need to be sure that we create a safe space for people to share their stories and tell their truth. Let us hold each other in love and fellowship as we proceed." You may even wish to say a separate prayer about that. You may also want to remind people that if they need a few minutes alone that they can go to…. (church, chapel, wherever is appropriate in the space).

As the facilitator, you should circulate and spend some time observing or even participating with table groups. Sometimes, you may need to "intervene" if it appears people are stuck, going off on tangents or if it appears only strong voices are being heard. You may need to sit down with a group and gently steer them.

When planning your time, the number of groups that need to present will dictate the time. Allow a minimum of 5 minutes per group but be flexible as sometimes people need more time especially if there is some emotion.

Groups report all Chapter 1 together, then all Chapters 2, etc. Post all the same chapters together in the same space.

4. The process can conclude here, or groups can reform to write a fifth chapter, The Next Chapter – the Future. Typically, they need about 20 to 30 mins to write it. Again they will report out. Once you post all the Future chapters, ask people to get up and review them and look for what's common, what's unique. Then you can facilitate a group discussion about what they observed/learned from the exercise.