



THRIVING CONGREGATIONS WORKBOOK

WITH LEADER'S GUIDE

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Thriving Congregations Workbook With Leader's Guide

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Andover Newton Seminary

AT YALE DIVINITY SCHOOL

Dear Readers:

In 2021, Yale Divinity School received a grant from the Lilly Endowment's Thriving Congregation's Initiative. Part of YDS's proposed programming included a project entitled "Reimagining Church," where two senior executive leader-educators pulled together a group of student-consultants to assist churches in envisioning a vital future. Those senior leaders invited me to create a curriculum for student-consultants ("facilitators") to use with congregations. What follows is my response to their challenge.

Even though the workbook has a particular program structure in mind, which aligns with the Reimagining Church project, my hope is that you, reader, can adapt it to your setting in ways that lead to hopeful and honest conversations about what God is doing now in your faith community.

Yours truly,

Sarah B. Drummond, Founding Dean
Andover Newton Seminary at Yale Divinity School

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GLOSSARY

Visionaries:

visiting
speaker-coaches
with new ideas
to seed.

Facilitators:

student-
consultants.

Working groups:

five lay leaders
and one pastor
from each
congregation.

Instructional staff:

student-
consultants'
teacher-coaches.



INTRODUCTION

INTRODUCTION

Facilitator Notes

The Facilitator, in consultation with the Working Group, might choose to engage the Introduction through group reading. This practice simply involves those who do not mind reading aloud doing so, alternating paragraphs.

Group reading can be bonding – like story time in elementary school – as people tend to internalize what they both see and hear more than what they merely see. The synchronous nature of group reading causes the groups to begin the process of digesting new material both simultaneously and faster, much like digestion begins not in the gut but in the mouth. Like chewing food, group reading helps us break ideas down. Practically, it also ensures that all have done the reading and reduces prep time between sessions.

“WE HAD TO HAVE TO.”

The words above sum up the stance toward change lived out by thousands of congregations during the Covid-19 pandemic. Faith communities that had long resisted technological innovations – or any other kind – suddenly had only one real option: want to use new technologies to get your community together? Or would you rather risk lives and break the law by getting together? Or not get together at all? Option #1, please!

Churches now find themselves in the midst of a post-Covid reopening reckoning. This workbook is designed as a resource for those who consider this time-like-no-other to be an opportunity to face realities. It is for those who feel emboldened by new knowledge and confidence that we are capable of much more dramatic change than we once thought. Fear of change might have kept us from exploring innovations before. When faced with fear of oblivion, change starts looking pretty good.

Ours is not the first generation of faith communities that have had to change in order to continue to live out an unchanged mission. If the mission of the church in

the world is to embody God's vision and extend life-giving love into the world, it is only natural that the mode of operation would need to evolve with culture and circumstance. That which made the Christian faith resilient from the start was its adaptive capacity.

The early church was a Jesus movement, where Jesus' followers lived out their faith differently depending on their settings. The letters of Paul in the New Testament show us that members of Christian churches worked hard to live out their missions and stick together, and they did so differently in Rome versus Corinth versus Ephesus.

In the fourth century, we see what happens when Christianity becomes a state religion, when a brutal emperor – Constantine – converts. From prosecuted to prosecutor, the church preserved itself inside militarism. It also did incredible things for communities and lives during the same years. The church migrated from its military bunker to a new shelter inside the walls of institutions. Again, the church found preservation that resulted in both good and ill; the point is, the church survives.

We find ourselves at a new juncture. The walls of institutions are no longer going to protect faith communities. Our wider world has woken up in the early twenty-first



century to the notion that no institution is too big to fail. Even our natural world is fragile, we have begun to understand. From oceans and mountains, to bees and microbes, that which we thought impervious to human activity turns out to be vulnerable.

We can no longer vest institutions with ultimate responsibility for ensuring we, or the communities that matter to us, are safe from forces that would dissolve or doom them. And that is good.

First, the fantasy of the invulnerable institution enabled passivity anathema to a passionate lived faith. Many scholars of theology and ethics have argued that Christianity simply works better as a movement than as an institution. In the words of Sue Phillips of the Sacred Design Lab, the institutional church of today is a “broken delivery system” for something the world needs badly.

Second, “faith” does not mean that we live expecting someone else – the institutional church, the pastor, or even God – will handle everything we do not want to face. Faith means that we believe God can work through us to change the world.

What follows is a ten-unit guide for groups within congregations to consider what it would take for them to become a functional delivery system for the Gospel in their communities today. We know that spiritual hunger is out there. If not, why would Soul Cycle and Peloton online classes be all the rage in fitness? People want to do something good for their inner lives, they want to be together, and they want to be inspired.

Following Jesus together. That is what the church delivers. Breaking that phrase into three parts, we find richness beyond what meets the eye.

Following suggests a way of life to which we tend through worship but which touches every aspect of our lives between worship services.

Jesus provides the guide for that way of life. His birth, life, ministry, death, and resurrection each provide amazing insights into life’s meaning. Jesus’ significance cannot be boiled down to a single lesson. Cosmic battle between good and evil? Teachings of gentleness and preferential compassion for the poor? Models of community and friendship? Yes, yes, yes. We could spend our whole lives following Jesus – and many do! – and discover something new every day.

Together suggests that Jesus might be our personal Lord and savior, but the life of faith is not purely solitary. Jesus came among us in the flesh and had relationships. Those he loved, and who loved him, challenged and nurtured him. Following his example, we humble ourselves by joining communities where we are constantly reminded that faith isn't all about us.

What do these times demand of us if we are to follow Jesus together? Where are we and others seeking meaning and purpose? Why are our churches important to our communities? How can we be of greatest and best service to the world? When can we start answering these questions? First, we need to ask them. Church, are you ready to ask and deal with what God is doing now? If yes, let us do so together.

Facilitator Notes

Early and mid-twentieth century theologian Paul Tillich wrote that humans' ultimate fear is the fear of death. All fears find their root in that ultimate fear, and that is good news. Why? Because by that logic, the resurrection should release us from not just fear of death but from all fears.

Facilitators can help normalize fear from the start while also reminding Working Groups to temper their fears with constant remembering: life wins.

Facilitator-Led Group Discussion

1. What are some examples of changes we as a faith community made during Covid-19 that we didn't know we had in us?
2. What are some examples of changes each of us made in our own lives? Were they similar, easier, or harder than those the church went through?
3. In what way did those changes scare us? Of what were we afraid, and how did we overcome those fears?
4. What fears do we bring with us into this process of discernment now? What would we consider to be the "worst thing that could happen" to our churches?

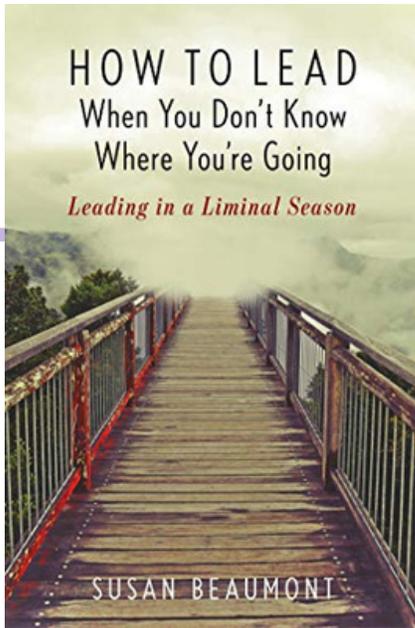


UNIT 1: COVENANTING

building trust - clarifying expectations - setting goals

Recommended Reading:

Susan Beaumont's
*How to Lead When You Don't Know
Where You're Going*



“Move at the speed of trust.”

– Stephen M.R. Covey

Covenants are mutual agreements through which human beings bind themselves to God and to one another. The Bible is full of them. God makes a covenant with Abraham, promising a great nation for Abraham and his descendants. After the flood, God covenants with Noah not to (literally) rain down wrath on humanity again, hanging a rainbow in the sky that symbolizes the bow the warrior hangs up when a war is over.

When a person joins a church, they enter into covenant. In congregational polity, covenant is that which binds churches to one another and a denomination; nothing less and nothing more. Covenants are similar to contracts in that they only work if participants understand the terms to which they are agreeing. They are different in that we enter covenants knowing we will need God's help to honor them.

At the outset of work together, Working Groups must define how they will be in community together. Creating a group covenant is a way to build trust from the start, with the understanding that God will strengthen bonds of trust as relationships grow.

At the center of a covenant is a shared purpose. God can help bind people together, but ultimately, if they are working toward different purposes, covenants are not enough. Marriages that break apart often do so because the couple has different visions for their lives together. When members of community are striving hard, but in opposite directions, the organization pulls apart like taffy, where the center cannot hold.

Defining a shared purpose takes time, however. Thus, we find ourselves in a curious bind. When we covenant with one another around a shared cause, we do not fully understand each other or that cause. When we marry a person, we do not know what challenges lay ahead. When we commit to a mission, we do not know how the context around that mission will metamorphose, nor do we know how our own passions might wax, wane, and evolve.

It is all the more important, therefore, that we cultivate and curate our covenants with care. Working Groups should begin their time together with intentional covenanting around basic parameters for what they will do and how they will do it. Then, as they progress, they should return to their covenant, reminding themselves of its core values and amending it as they create new wisdom through experience and reflection.

All groups need God's help in honoring covenants, for they can be astonishingly strong (like the family that stays together through tragedy and loss) or frighteningly fragile (like the family that cannot). When a community covenants together, it builds a supportive scaffold that surrounds it. We stand on that scaffold as we build and sculpt. The strong and steady scaffold is not ultimately what we are building, but it is the reason we can build at all.

We build the scaffold unsure what winds or rains might come to blow it down, as well as that which we are building. We have every reason, however, to think we can withstand whatever comes our way with the help of mutual trust and God's help in honoring that trust.

Facilitator Notes

Trust is essential to the effectiveness of the Facilitator in the Working Group. The Facilitator might be the only person unknown by the others, which means that trust must be earned over time. The best way the Facilitator can win trust early is by making it clear that they have no agenda but for the flourishing of the Working Group as it discerns God's will.

Congregations often worry that new ministers will tear down traditions, not knowing how important they are to people. They say - and mean - that they welcome new ideas, but until the congregation trusts their leader, they will not feel safe to let go.

The shadow side of trust is fear, and underlying fear is fear of loss and its accompanying grief. The Facilitator therefore must hold the Working Group's trust as they would hold an egg, recognizing trust's potential and handling it gently. The good news is that, once trust is established, it is amazing what the Facilitator can say, do, and accomplish.



Facilitator-Led Group Exercise

1 Each person in the Working Group takes a turn describing why they joined this team and what they understand its purpose to be. Using a flip-chart or other means, the Facilitator captures key phrases and themes as each speaks.

2 Then, the group discusses ground rules for work together. Each person in the Working Group offers one ground rule to a list also captured in-writing (flip-chart or other means). The Facilitator keeps going around the circle until no new ground rules are up for consideration.

Typical ground rules include attention to:

- a. **Timeliness:** starting and ending meetings on-time, limiting comments in duration so that everyone has a chance to speak
- b. **Confidentiality:** what is shared in meetings stays within the group, except that any should feel free to share what they themselves have said, or to convey what others have said with that person's explicit permission
- c. **Listening:** honoring each other's words by refraining from interrupting, seeking understanding rather than "winning" a debate

#1 in this Group Exercise is of crucial importance. Groups tend to rush to #2 - talking about the "how" - because they assume that all in the group have the same idea of their shared purpose (the "what"). The Facilitator needs to slow the Working Group's roll.

For instance, if the second person to speak says they simply agree with what the first person said, the Facilitator should press them for specifics. Shared habits are unhelpful in the absence of shared purpose.



Facilitator Notes

The Facilitator takes the list of ground rules home after the session and writes up a group covenant, sending it to the group for comments and corrections. The format for the covenant should look something like this:

Covenant

We, the _____ Working Group, are here to: **[list themes from #1 above]**

We commit to honor each other and our shared task by: **[list themes from #2 above]**

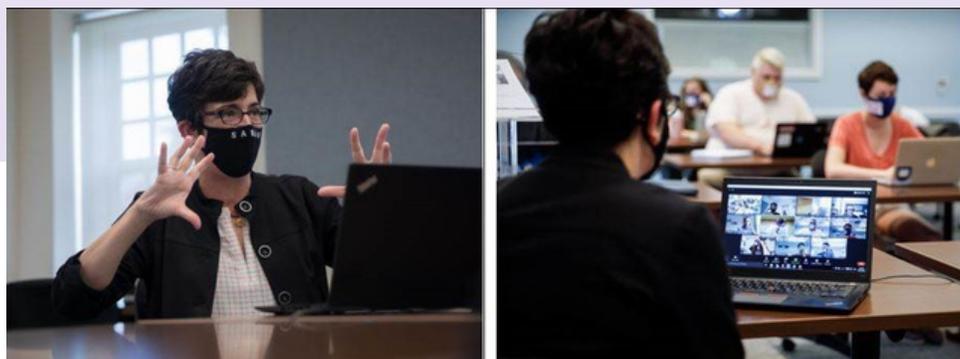
We will revisit this covenant every **[name regular intervals]**, or when we find ourselves at cross-purposes.

We covenant to respect these goals and guidelines with the help of God.

*At the start of the next meeting, the Facilitator should **read the covenant aloud** and ask for either verbal or written assent to what has emerged as the group's shared understanding of how it will work together.*

The Facilitator's role in this exercise is to capture thoughts, lift up themes, and then encourage buy-in to the covenant the group has created.

One productive way to foster buy-in is to have the group review a draft so they can clarify and sharpen the language. With the final draft, the Facilitator can format the covenant into an attractive and professional-looking document to share with the group and to post on a physical or virtual wall.





UNIT 2: THEORIES OF CHANGE

Recommended Readings:
Brest and Thompson articles

Facilitator Notes:

This is one unit where everyone in the Working Group will answer questions in advance of meeting together. You could engage in group reading (see Facilitator guidance for the Introduction) the meeting before if the group is enjoying that practice.

How does change happen?

Each of us carries assumptions around with us about how to answer that question.

We do not talk together much about those assumptions, but conversations sometimes surface evidence of them. We might hear someone say, "All will work itself out in time," or, "This too shall pass." Another person might sigh, describing a human or institutional mistake, saying "Well, what did you expect? This was bound to happen, has happened before, and will happen again." Leadership scholars call the assumptions underlying such statements "theories of change."

Turn to page 20 for five examples of theories of change relevant to congregational life.

An Augustinian Anthropology

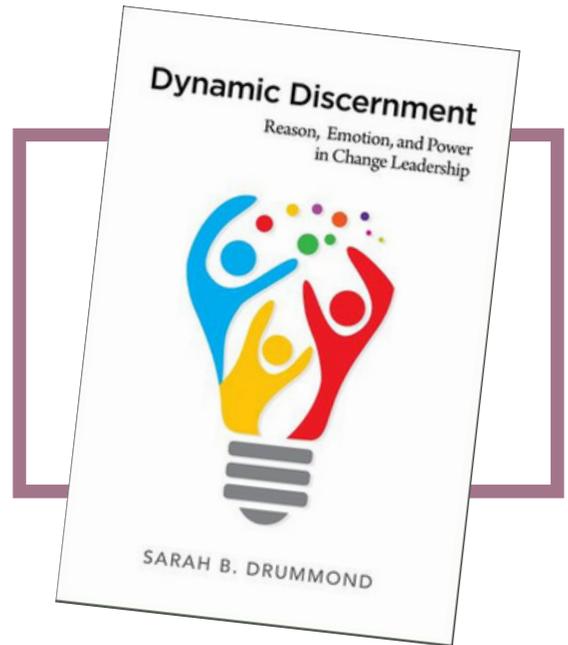
St. Augustine was a fourth century Christian monk and mystic in North Africa. He wrote about how all creation is fallen but can be redeemed through God's resurrecting love. Augustine described a City of God that coexists with our reality on a quantum level – simultaneously, but on a different plane. The work of the Christian and the church is to cause the reality in which we live to resemble the City of God.

Many important religious thinkers embrace an Augustinian anthropology. Martin Luther King, Jr.'s world-changing "I Have a Dream" speech describes an alternate reality toward which he implored us to strive. 18th century Great Awakening theologian and preacher Jonathan Edwards described how human experiences of beauty – awe – represent the in-breaking of God's reality into our own, sending us messages about the task of redeeming the world on God's behalf, constructing a resurrection reality.

When a Christian organization engages in "visioning," an Augustinian anthropology would suggest that we are not bringing leaders together to cast one. Rather, a community gathers to collectively interpret what God's vision is for a community, tapping into that which we know in this life only through dreams, beauty, and other in-breakings. No one of us sees God's vision wholly, but – as Paul wrote – through a mirror dimly. Each of us carries just one or two puzzle pieces for what God has in mind for us, so we have to put our pieces, and our leaders' heads, together.

Dynamic Discernment

In *Dynamic Discernment: Reason, Emotion, and Power in Change Leadership* (The Pilgrim Press, 2019), Sarah Drummond writes about three different schools of thought on how change happens. Drummond argues that all three schools – what she calls “dynamics” – coexist, but rough spots are usually associated with one prevailing dynamic. Therefore, the leader’s main job is to read what is happening amidst change and then make a choice for how to engage (or not to engage, as the case may be). The three dynamics explored include:



1 Reason

Literature about change from the business world suggests that change can be managed: organized into steps through which the leader can guide a community. Early steps might include goal-setting, delegating authority, and communicating about the change in order to energize the community and garner buy-in. Final steps usually involve taking action to institutionalize and anchor change, preventing backsliding. Reason dictates that leaders plan well and educate communities about why a change is needed. They must outdo themselves in communication. When leaders discern that members of the community are confused or unmotivated, the arrows they should pull from their quiver are those of planning and teaching.

2 Emotion

Those who study the social sciences, such as psychology and sociology, consider institutional change in light of emotional systems. These theoretical perspectives assume that emotions belong not just to individuals but are interlaced inter-individually in ways that sometimes defy reason. For instance, emotional systems tend to perpetuate themselves even as individuals swap out: a curmudgeon dies, and immediately, a new one emerges. Emotional systems tend toward preservation of the status quo, which means they cause organizations to resist change.

3 Change

Leaders’ most effective stance amidst distressed emotional systems is one of nonanxiety. Leaders must demonstrate that a change constitutes nothing to fear by behaving calmly and fearlessly. Nonanxiety should not constitute disengagement, however, but rather confidence in a new direction.

4 Power

The challenge of leading change amidst power dynamics that stand in change's way is that power preserves itself by hiding. Communities hardly ever talk about the role power plays in their work, and yet somehow, those with the most resources always seem to get their way. Liberation theologians confront power dynamics head-on, calling them out rather than allowing them to control outcomes from the shadows. Originating in agrarian communities in Central and South America, liberationist priests worked to empower farm workers through tapping into their wisdom and empowering them to engage in consciousness-raising dialogue.

A liberation theologian would argue that the root of evil is alienation. Community organizers argue that a good way to begin to break the estrangement cycle is through identifying areas of common concern, working together, and thus getting to know each other. A leader seeking to bring about change amidst strong power dynamics must zero in on those common interests and, around them, build community.

5 Emergence

The fifth and final theory of change to consider when approaching collective work in a congregation is that of emergence. A person who believes that change is not manufactured, but rather emerges, has great respect for disciplines of patience. The leader's role is to keep the community together and attendant to that which is emerging, neither backsliding into old ways nor rushing to closure before the change is ready to be born. The leader needs to keep the status quo going just enough to ensure that the community does not lose confidence in either the leader or the institution's viability. But mostly, the leader engages the community in practices of discernment of what God is doing to which they ought to be paying attention.

Amidst these five theoretical frameworks, we find certain commonalities.

First, all five assume that change does not happen on demand. Even the most hierarchical organization's change initiatives require buy-in all the way down the chain of command if change is to become fully institutionalized.

Second, all five call on leaders not just to change their organizations, but to change themselves. Resistance to change starts from inside us, not in stubborn "others" the leader must persuade to become different.

For both reasons, leaders are wise to take time to think – individually and collectively – about their theories of change. Unspoken assumptions about change can lead to conflict in communities, as

people tend to assume that everyone thinks the same way they do, not realizing that their theories of change are one among many. If one person in a group wants to plan out a change (using reason), and another thinks it best to discern what change is emerging, they might easily label one another: "Control freak!" "Lazy!" "Passive!" A good way to arrest deteriorating dialogue between change leaders who have different points of view is to step back and discuss the assumptions each is carrying into the dialogue.

As an Augustinian anthropology indicates, **there is more than one version of reality happening at any given time.** Moments of communal change lay bare the multiple experiences taking place in singular communities, and those are just the realities we see. Underneath what we see are differing philosophies among even those who seem utterly likeminded. Discussing theories of change honors and acknowledges those differences while vesting hope in the possibility of people coming together and making good things happen.

Facilitator Notes

The Working Group might be surprised that they are invited to share from their current and past lived experiences.

Doing so models that change leaders must be ready to change themselves. It also makes being part of the Working Group more meaningful as relates to both spiritual formation and community-building.

That said, such sharing is the reason why covenanting is important: it should feel enriching, not scary.

Individual Exercise

1. Which of the theoretical frameworks described here resonates most closely with your own experiences of change? Did any examples come to mind as you considered them?
2. What change is happening in your life right now? In what ways are you nurturing and encouraging that change, and where do you sense resistance to the change from yourself or others?
3. What is one example of a difficult change you have experienced in your past? What did you learn through it about the way change affects you?

change

reason

emotion

power

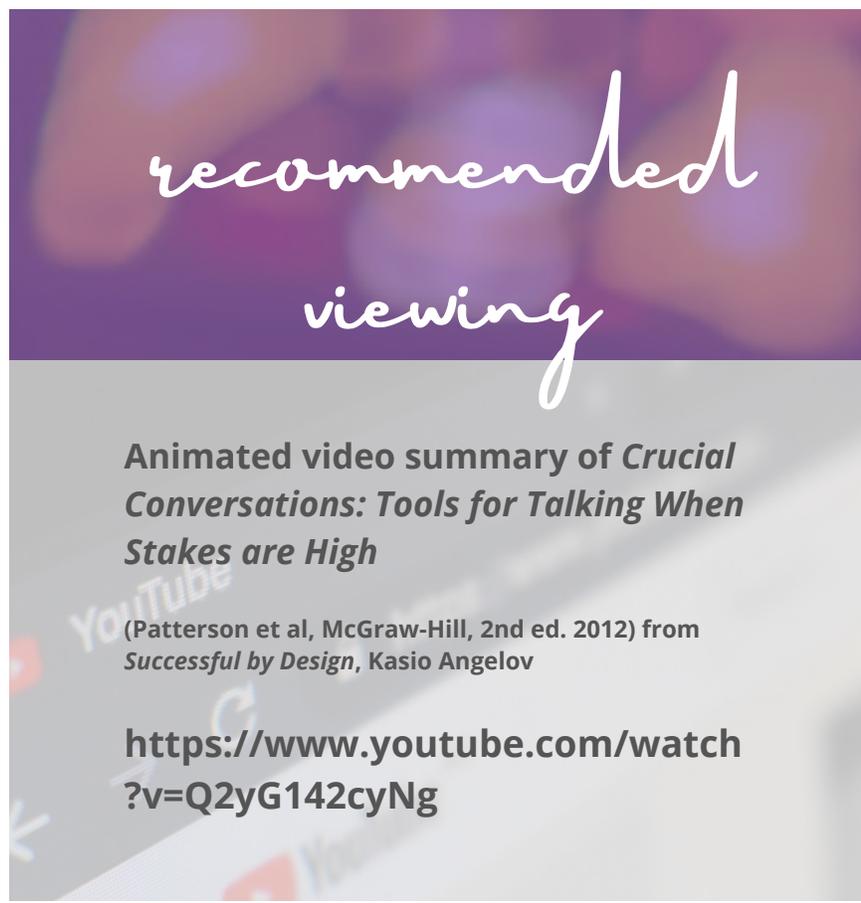
emergence

UNIT 3: CRUCIAL CONVERSATIONS

“To think of conversation as a **sacred art** challenges us to imagine all the conversations in which we participate, from the acquaintance we run into at Target to the dialogue for which we've spent weeks in preparation, as a potentially sacred conversation.”

– Diane Millis

(From *Conversation – the Sacred Art: Practicing Presence in an Age of Distraction*)



recommended
viewing

Animated video summary of *Crucial Conversations: Tools for Talking When Stakes are High*

(Patterson et al, McGraw-Hill, 2nd ed. 2012) from *Successful by Design*, Kasio Angelov

<https://www.youtube.com/watch?v=Q2yG142cyNg>

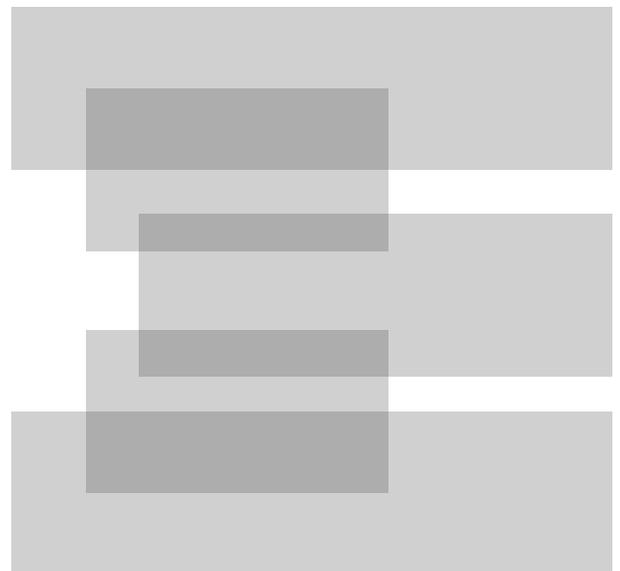
Faith communities and workplaces rely so heavily on meetings that it is strange, when you think about it, that we rarely talk about what makes meetings helpful or unhelpful. Sometimes, we might know during a meeting we are attending that it is not getting us anywhere, and we can name some of the things that are going wrong, such as a lack of clarity about why the meeting is happening; or the absence of ground rules about who might speak, how often, and for how long. One common denominator among unproductive meetings of all kinds is vagueness or confusion about the agenda.

We often hear the term “agenda” described as a negative thing. A person who “has an agenda” comes into conversations with selfish ulterior motives, we think. Does that mean we are supposed to engage each other without goals or priorities in order to demonstrate purity and selflessness? No. Having an agenda is not inherently problematic. Having a devious, self-serving agenda? That’s when things go wrong.

An agenda functions to focus a conversation, allowing participants to relax into being together and thus show up emotionally. An agenda for a phone call with a best friend might be to catch up and connect. An agenda for a work meeting might be to make a decision. In *Crucial Conversations*, Patterson et al write that we must enter conversations with clarity of purpose about why it’s happening and stay focused on that purpose, rather than unhelpful ulterior motives like “winning” and “being right.”

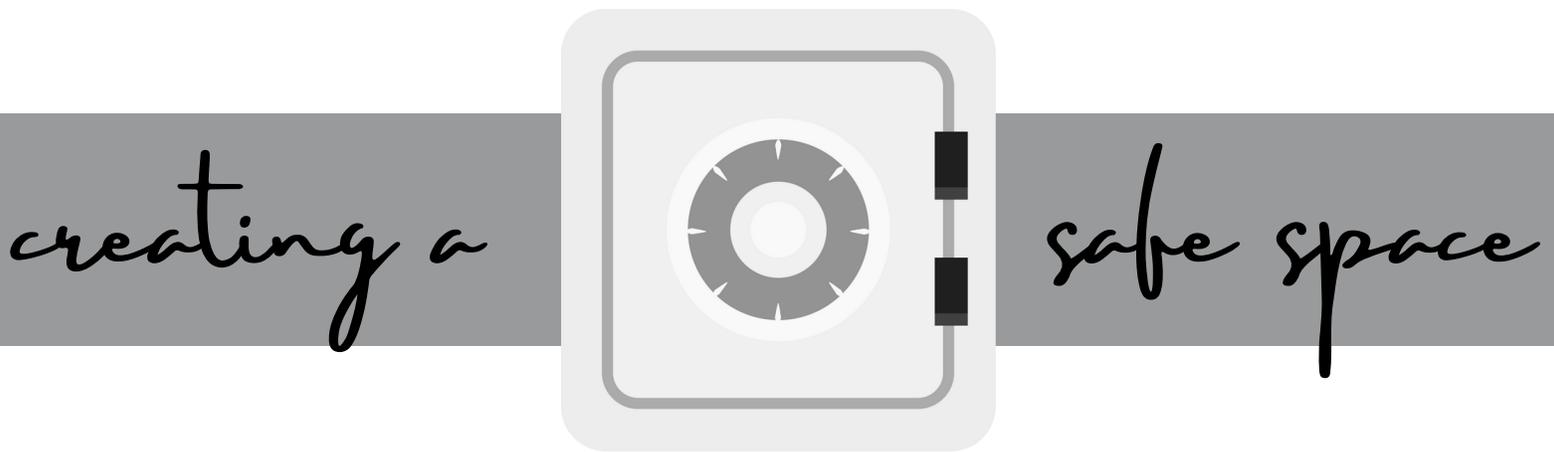
Patterson et al define a crucial conversation as one having three concurrent attributes:

- 1 Emotions are strong
- 2 Stakes are high
- 3 Reasonable people disagree with each other



The authors posit that the purpose of any crucial conversation – the reason to get together and talk with each other – is to increase the pool of shared wisdom from which leaders and decision-makers can draw. Increasing knowledge of each other and of our subject matter: that is an agenda we can embrace.

To facilitate a crucial conversation, we first must create a safe space. Some practices that create safety are guidelines about who may talk, for how long, and when; mutual understanding of confidentiality standards; and an agreement about the purpose of the conversation and how we will know its goal has been achieved. Then, we have to trust that, when the pool of shared knowledge grows, good things will emerge out of it.



During the Covid-19 pandemic, many young adults “boomeranged” to their parents’ residences to quarantine and work remotely. Imagine a situation where a family is getting together to talk about sharing a home. The family meeting is a classic example of a crucial conversation, where stakes are high, emotions are strong, and reasonable people disagree sometimes.

Some steps the family might take would be to:

1. Choose a time of day for the conversation where most tend to be at their best and a location where they are on no one person’s “turf” but rather in a neutral, shared space in the house.

2. They might **start out the conversation** by stating what each hope to accomplish in it.
3. Participants might **share what is at stake for them** in the conversation, such as their greatest worries about what might go wrong when sharing space.
4. Then, they proceed to **add to the body of knowledge** the family shares. No problem-solving is required, at least not at this point. Just having the conversation is inherently good.
5. They can bring the conversation to a close by each **sharing something new they learned**, and then trust that models of behavior might emerge.

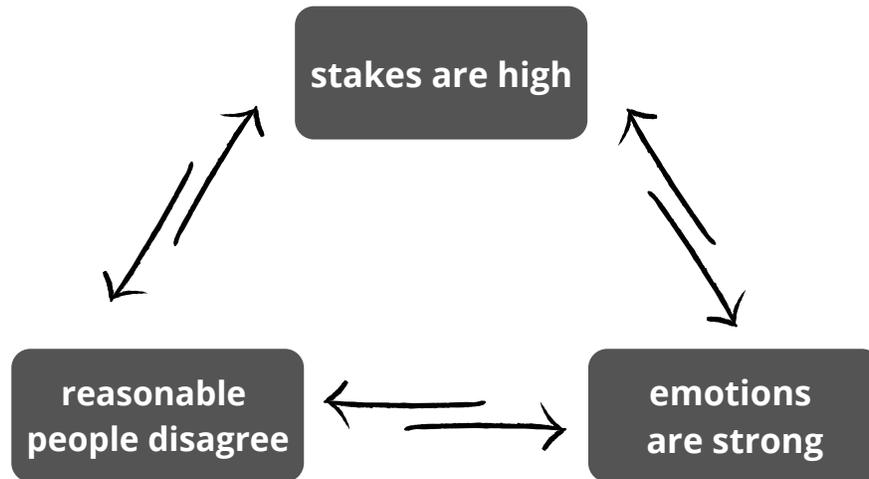
If we find ourselves at a meeting where many gather who have meaningful wisdom, and those gathered are silenced and compelled to listen to report after report with no discussion, we are allowed to feel like our time is being wasted, because it is. Crucial conversations are anything but a waste of time, in that they create new social capital while also setting a community up to articulate and achieve its purposes.

Facilitator-Led Group Exercise

The Facilitator projects (using a flip-chart, shared Zoom screen, white board, etc.) the diagram below for the Working Group's consideration. Then, the group discusses where in the life of their community each dimension of a crucial conversation is most real for them.

- Where are their own emotions strongest?
- What is at stake for them and the congregation?
- Where do they see disagreement among thoughtful and reasonable people? (cont. on next page)

By having a crucial conversation themselves, the Working Group is increasing their pool of shared knowledge while also building up skills for engaging the wider congregation.





UNIT 3
CRUCIAL CONVERSATIONS



UNIT 4: INTEGRATING NEW IDEAS

*recommended
reading*

Norheim Article

Learning and change go hand-in-hand. Sometimes, a change effort in a community might go wrong, and critics say that leaders tried to move too fast. Look closer: the problem probably related not to pace, but to knowledge. The leaders did not move too fast; they just did not know what they were doing.

In order to bring about change rapidly, slowly, or anywhere in between, leaders need to know what they are doing. They need to understand the problems they are trying to solve, the possibilities available to them, and the best practices learned by others the hard way. They also need to know what is at stake for their community amidst change so as to maximize trust and minimize fear of loss. As any farmer can tell you, never tear down a fence until you know why the fence was erected in the first place.

We make a mistake if we assume that a group of leaders can simply hear a speaker, read a book, or visit a thriving ministry site and osmose all the learning they need. No. Human knowledge is not like files in a drawer or computer that we can drag, drop, pull, and sort.

People have to integrate new information into what they already know and make it their own.

Deciding What to Learn

The time we spend choosing what we need to learn is always a good investment, for relevant new knowledge energizes communities. When groups work together to choose what to learn, agreed-upon criteria help. A book group might have difficulty choosing what to read if books could fall into any category: fiction or nonfiction, articles or poetry. Here are some questions worth considering:

Facilitator Notes

The Visionaries who spend time with Working Groups provide an excellent opportunity to learn how to learn for leadership. Facilitators should encourage the Working Groups to use some of the ideas from this unit to make the greatest and best use of time with Visionaries. Facilitators should also guide groups into thinking about what else they want to learn together, avoiding taking on too much, but also avoiding the trap of thinking that all we need to know is already between our ears.



Who in our community should we have in mind as we seek out new learning?

2 What are other settings doing in their ministries that might give us new ideas?

3 What is the latest theory on best practices for communities like ours?

Processing What is Learned

Why can we not simply read a book, attend a lecture, or interview an expert, and then move on? Because each of us might be interpreting our learning in different ways, or not interpreting at all but rather doing what Otto Scharmer calls “downloading.” In his seminal book, *Theory U*, (see presencing.com) Scharmer writes about how we must take new learning deep within ourselves so we might be transformed, emerging on the other side of the “U” having been changed.

A simple exercise for reflecting individually, and then sharing with a group what we have learned, involves use of a rubric-style integrative exercise. During or after hearing, observing, or reading, we capture our thoughts in a way that is organized so that, when we debrief with others, we are – as the saying goes – singing from the same sheet music. Here is a sample integrative exercise:

This book/speaker/interviewee said...



My thoughts on the matter are...

Some implications for practice might be...

By taking the time to sort through what was said, what was heard, and what it means, we avoid the temptation to drag-and-drop information without internalizing it. We allow ourselves to be changed, and no one can lead change unless they themselves become something new.



Individual Exercise

Complete a rubric using the template above during or after the visit with the first Visionary.



Group Exercise

Take turns sharing what you wrote in your rubric. Also, take time to discuss how you listened and processed what you heard. How did the integrative exercise change the way information struck you, if at all?

Facilitator Notes

The Facilitator might choose to ask members of the Working Group to share their integrative exercise rubrics with each other. They should be wary, however, of making participants feel self-conscious. Other alternatives might be for the Facilitator to receive all exercises and synthesize them between meetings into a shared rubric, or to have Working Group members read their responses aloud while the Facilitator captures themes on a flip-chart or other recording method.



UNIT 5
GATHERING INPUT

UNIT 5: GATHERING INPUT

- SURVEYS
- FOCUS GROUPS
- INTERVIEWS
- WORLD CAFÉ
- APPRECIATIVE INQUIRY

Facilitator Notes

One of the most important contributions Facilitators will make to the communities with whom they work is helping them to build capacity to gather input. That might not seem like a heroic task, but a community's capacity to reach out, reach in, and make sense of their situation is a matter of institutional life and death.

*recommended
reading*

**Holy Clarity, Drummond,
Chapters 3-4**

The theme song we should play in our heads when it comes time to gather input – data – from a community is the classic ballad, “Fools Rush In.” If you are a fan of old music, you might think of Elvis singing, “Fools rush in where angels fear to tread,” not realizing the complex etiology of the saying he’s crooning.

The song was actually written in 1940 by Johnny Mercer and Rube Bloom. It has been covered by everyone from Rosemary Clooney to UB40. The saying that constitutes the song's first line comes from an essay on literary criticism by Alexander Pope, which was later quoted in the title of a novel by E.M. Forster.

With this layered history, "Fools Rush In" becomes a metaphor in two layers. We should not rush into situations we do not understand, says Alexander Pope. Angels are wise not to. The Elvis song turns out not to be a song by Elvis, and if we slowed down enough to pay attention and gather information, we would know that.

Gathering input from a community we think we know well is an exercise in wisdom and humility. Any group of people that has both numerous constituents and a few years of history surely has much happening beneath the surface that even the most plugged-in leaders do not know. Therefore, early in a discernment process, we gather data not to prove what we think we already know, but to honor the complexity of the organization and seek knowledge and understanding.

A data-gathering process must be well thought-through, methodical, and simple. A researcher knows that every hour they spend plotting out how they'll gather and analyze data will save them twelve later. Only fools rush into information-gathering because fools are not curious. They have preconceived notions and end up asking questions that leave people hurt and disappointed. Those who use this workbook are no fools! What goes into planning?



Step 1

What do you want to learn? Take time to boil down questions to those about which you are genuinely curious, and where only the wider community can give you an answer.

Step 2

Who are your stakeholders? Consider who can answer your questions most effectively, which might be a different group than you might call "the usual suspects."

Step 3

Figure out the best way to get your questions answered clearly and accurately. Make a preliminary plan for data collection. Gathering data need not look like gathering data. It can be genuinely fun.

Step 4

Before getting out there to gather data, create an analysis strategy. What are you going to do with your data when you have them? Who will see them, and how will they shape thinking? An analysis strategy might help you avoid asking for information you will not use. After coming up with an evaluation strategy, review the data-gathering plan.

Step 5

Gather data and analyze it using the strategy you created in Step 3.

Data Gathering Menu

A fun gathering that generates many new ideas, creates many new insights, and gets people excited about the process can be a great ice-breaker before getting into the drier work of data collection.

Appetizers

World Café

Set up a gathering space with small tables, each covered with newsprint and furnished with a set of multicolored markers or crayons. Around the room's periphery, set up refreshments. Ask everyone to grab refreshments and a seat, and then pose an open-ended question. Ask groups at each table to talk over the question and doodle on the paper as they do. After

Data Gathering Menu

10-15 minutes, ask everyone to change tables, then ask another question. Continue for 45-60 minutes. Then, ask volunteers to hang the now-very-colorful newsprint around the room; linger for an “art exhibit” and informal conversation.

Boil-Downs

Set up a gathering space in a way that people can move around easily. Give attendees a pad of small sticky notes. Give the group a challenge like this: “Come up with the five most important contributions our church makes to the world,” and ask them to write each contribution on a separate sticky note. Then, ask them to pair with their neighbor and boil down their ten notes to only five. Then, have pairs form groups of four. Continue getting groups together and compelling them to boil down their sticky notes to five until the whole group has named five top contributions.

Entrées

Data gathering should be simple and easy, as leaders need to preserve their energy for data analysis down the line. Leaders should avoid choosing more than one or two of the strategies below, as analyzing blended data is challenging and draining. Pick the “entrée” based on that for which you are hungry. In other words, let the question drive the method.

Surveys

A common data-gathering practice is to disseminate surveys in communities. Some good practices in designing a survey include:

- Emphasize questions about the participants’ lived experience over the participants’ opinions.
- Test out the survey with the leadership team to ensure that all “hear” the questions as they were intended.
- Lean toward quantitative questions (that can be measured in numbers) over qualitative questions (answered in words), as they are easier to

Data Gathering Menu

aggregate later. For instance, ask “on a scale of 1-10 (or “Likert Scale”), how satisfied are you with [name a dimension of the ministry]?” and add a comment box; rather than asking, “How satisfied are you with...” as an open-ended question only.

Analyzing data is easiest if surveys are distributed through a Web-based instrument like Survey Monkey. Alternatively, surveys can be distributed and collected, and then analyzed quantitatively. Further analysis can seek out and highlight themes within words that correspond to the questions that drove the survey.

Focus Groups

Bring together small gatherings of people, using a thoughtful sampling strategy that maximizes likelihood of robust sharing. Pose open-ended questions and encourage participants to direct their comments not to you as answers, but to each other as a conversation. Take great notes and record sessions. Analyze data by seeking out and highlighting comments relevant to the questions that the Working Group sought to answer.

Interviews

Get together with constituents in groups of one or two and ask them questions about their lived experience. Choose topics that do not lead to “answers” but stories. Use a consistent questionnaire across participants and take great notes. There is no need to record interviews, as you are doing constituent outreach, not a research project, and one-on-one, interviewers are not likely to miss much. Analyze data by seeking out and highlighting comments relevant to the questions that the Working Group sought to answer.

Document Analysis

Meeting minutes, website copy, newsletters, and promotional materials provide meaningful insights into a community’s life and identity. Analyzing them with

Data Gathering Menu

questions in mind, like, What do these words tell the world we understand ourselves to be? gives us a new and informative angle on them and on our communities.

Dessert

Cultivate Joy

Working Groups should build fun and joy into gathering information from constituents so as to overcome some of the negative feelings people have to data gathering. Some in the community might have had bad experiences with poorly managed personnel reviews or testing in school. Others might have been candid in previous evaluations, in the church and elsewhere, and found that nothing changed. Suggestions for building in joy include:

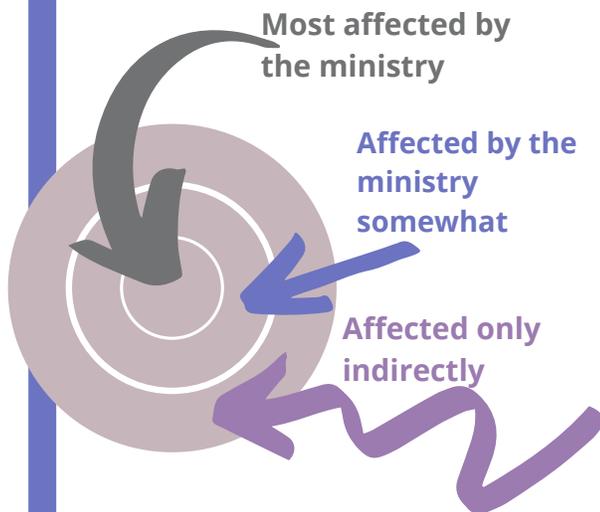
- Offer refreshments and a pleasant atmosphere in data-gathering events and activities.
- Make events playful and fun, with a fair bit of silliness.
- Use artistic activities wherever possible, especially visual arts. Instead of asking people to fill out a survey, for instance, ask them to draw a picture depicting a meaningful moment in the faith community.
- Offer prizes for survey participation. For instance, ask participants to take a screenshot of their survey “thank you” page, and enter participants in a raffle where the prize is cookies from the best baker in the Working Group.

Engage in Appreciative Inquiry

Appreciative Inquiry is a style of engagement that connects with people in their happy place. Those who employ it emphasize possibilities over problems and positive thoughts and memories. The purpose of Appreciative Inquiry is not to avoid tough conversations, but to cause our brains to seek out more of the good, which provokes creativity.

Group Exercise

In one session, brainstorm the questions the Working Group has that the wider community can answer. Note the distinction between the Working Group figuring out what it wants to learn, as opposed to the Working Group figuring out what to ask. Good questions emerge from what the questioners desire to learn.



In the same session, complete a Stakeholder Map, as described in Sarah Drummond's *Holy Clarity: The Practice of Planning and Evaluation* (The Alban Institute, 2009).

Now, empower and bless the Facilitator in the project of creating a proposal for constituent outreach to bring back to the Working Group for review and comment. The actual design for the outreach will suffer with too many cooks, but all can and will be involved before outreach begins.

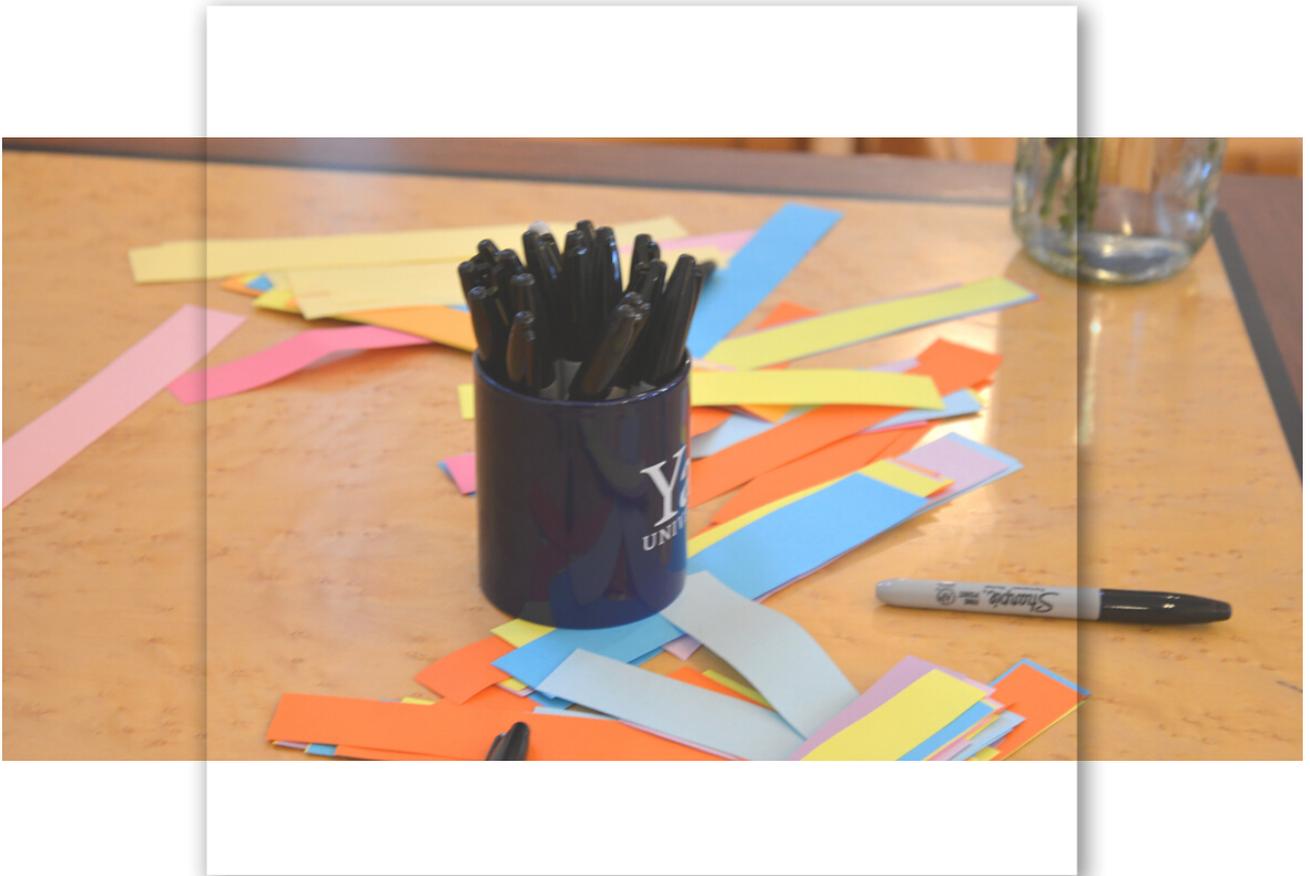
Facilitator Notes

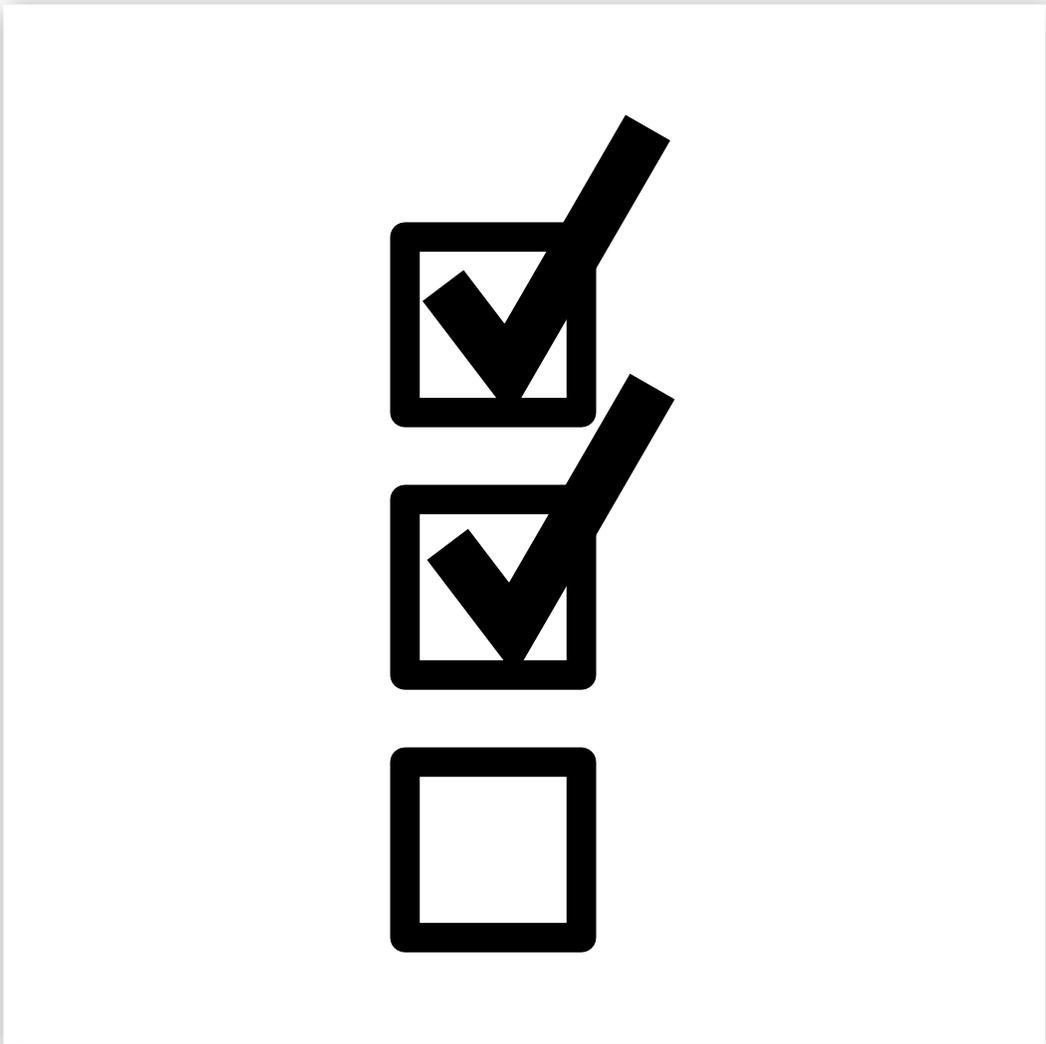
With key questions and stakeholders in hand, the Facilitator can now get to work proposing a strategy for constituent outreach. A good strategy is one that is simple, succinct, and sustainable.

Simple: only choose one appetizer, entrée, and dessert. Data are hard enough to analyze when not having to deal with a mixture of results.

Succinct: design the outreach so its beginning, middle, and end are all plotted out within a 6-8 week timeframe. Know in advance what you plan to do with results of outreach and inquiry, including data analysis and dissemination of findings.

Sustainable: the underlying point of this outreach exercise is to build capacity in the congregation for reflective practice long into the future. Make that outreach accessible, fun, and helpful, and you have done your job.





UNIT 6: EVALUATING AND ANALYZING

recommended
reading
eventually...your findings!

Facilitator Notes

Facilitators should make sure that this section of the workbook is taken into consideration after drafting an evaluation plan and before collecting data. They should leave time to revise evaluation plans after realizing how much time and energy must be conserved for analysis, documentation of analysis, and discussion of implications for practice emerging from findings.

A good evaluation process is one that poses relevant questions and gathers data in a way that is simple and straightforward. The best argument for an uncomplicated and streamlined data collection process is this: we need to conserve our energy for evaluating and analyzing what has been learned.

A common mistake organizational leaders make when engaging in evaluation is they burn all their energy on data collection and find themselves either too tired or pressed for time to chew and digest the new information they have gathered. They skip straight

to carrying out implications for practice, not necessarily sure that the implications they have taken away emerge from their data or from their preconceived notions.

In other words, they waste data and do what they might have done without having gathered new insights. This waste of good new knowledge causes constituents to feel disillusioned, understandably; their time has been squandered, and their views haven't been taken seriously. Given how common it is for data to end up unread on the cutting room floor, it's no wonder that many constituents hear "please complete this survey" and groan.

The best way to prevent this phenomenon is to build a data analysis strategy into the evaluation plan before collecting a shred of input. When a researcher creates analysis strategies, they might use sophisticated analysis software, as they are seeking to create new knowledge. When a group of designated leaders conducts an evaluation for the purpose of organizational improvement, the best instruments for analysis are the Working Group members' minds.

Questionnaire Cover Sheets

<p>One analysis strategy that works with a variety of data sets is the creation of cover sheets. Survey responses, interview notes or transcripts, and focus group notes or transcripts all qualify as “raw data.”</p> <p>Leaders can analyze raw data separately or on their own, complete common questionnaires, and then talk together about what they saw in their findings. Questionnaires can include:</p> 	<ol style="list-style-type: none"> 1. In this body of data, where were my prior assumptions confirmed? Where were they challenged? 2. Where did these data demonstrate evidence of consensus in the community? Where do they show disagreement or a variety of views? 3. What implications for the Working Group emerge from these data? 	<p>Members of the Working Group should read their findings and complete questionnaires before meetings set up specifically to discuss evaluation findings. Then, Facilitators can collect all questionnaires and create a new cover sheet that summarizes the analyses of members of the Working Group. Results are analyzed and meta-analyzed data. Worries that the Working Group glanced at data and then forged ahead melt away.</p>
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Sharing Analysis Strategies from the Start

Building an analysis strategy before gathering data helps leaders to avoid the mistake of gathering more input than they can use. Wasting data is not only demoralizing for those who take the time to share their views, but it raises ethical questions about whether the evaluator actually wanted to learn from their communities or were simply seeking confirmation for their own agendas. In fact, it's a good practice to describe how data will be analyzed before or during the process of posing questions to the community. An example of how a data collection instrument might define an evaluation strategy might look like this survey preamble:

“What follows is a survey where you will be asked to describe the impact this church has had on your life and what suggestions you have for increasing its faithfulness and vitality. Facilitators and members of the Working Group will study respondents’ input using this questionnaire: [insert questionnaire here].”

Sharing Findings

A final good practice is to promise respondents an executive summary of findings, perhaps written by the Facilitator, so they can know how their views aligned with those of others in the community, and so they can later understand the bases on which changes or reaffirmations were predicated.

An executive summary is a short – one page? – synopsis of prevalent views found in data, as well as acknowledgment of non-majority views where they reflect more than two or three respondents. Sending these data as a thank you to participants demonstrates that their input was taken seriously and prepared them for action and change.

share



Group Exercise

Return to steps 1-5 in the section of this workbook on creating an evaluation strategy. With every step, consider what would need to happen to ensure that data gathered are analyzed and taken fully into consideration. It's a lot, right? What needs to change about the evaluation process now that you know how much work will lie on the other side of gathering input from the congregation?





UNIT 7: LESSONS FROM COMMUNITY ORGANIZING

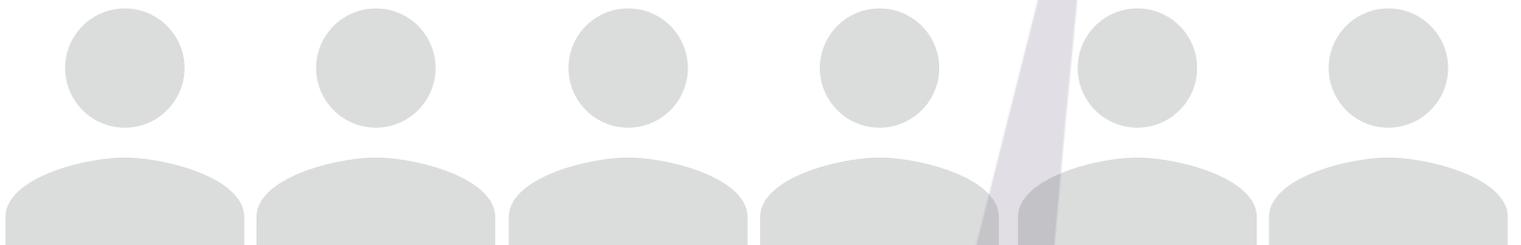
recommended reading

Galuzzo Article

Community organizing is a leadership methodology that resonates with Christian theologies of liberation. Liberation theology, which emerged from agrarian communities in Central and South America in the mid-20th century, emphasizes Jesus' message of release from oppression. Powers and principalities, by their nature, treat people like cogs in the machine that makes them more powerful. Oppressed persons, by their nature, undervalue how much power they have to bring about grassroots change.

Liberation theologians do not promote the overthrow of oppressors, for the whole system must be disrupted, otherwise the oppressed will simply become Oppressors 2.0. Instead, liberation theologians promote consciousness-raising that helps the oppressors to see those they are instrumentalizing as real people, and to help the oppressed to discover that they are powerful beyond what they previously imagined.

Community organizers help the oppressed to find each other, identify shared goals, and in some cases collaborate with the powerful in the achievement of shared goals. Whereas the forces of oppression often divide the oppressed, pitting them against one another, community organizers help them find common ground and exercise power they might not have known they possessed.





Working groups can take inspiration from disciplines of community organizing in two key ways:

1

Community organizers are methodical. They break down their work into succinct and strategic steps. Often, community leaders in churches seek to operate without a methodology and expect change to result by happenstance. It does not, and it will not. Leaders must plot out strategies and action steps if they want the future to look different from the present and past.

2

Community organizers bring people together and invite ideas and direction to emerge from the community. They rely not on top-down, formal sources of power, but grass-roots energies that push up from the ground. Similarly, working groups are wise to create settings where directions and ideas emerge, placing faith in the Holy Spirit that it will work through the community in ways that need not be imposed upon it.

Group Exercise

Review evaluation results from the unit on Gathering Input. Discuss the following: What new ideas and energies do you detect rising up from the grass-roots level? What would it take to empower the community to live out those ideas? How can institutional structures support, but not suffocate, that emergence?



mission

vision

values

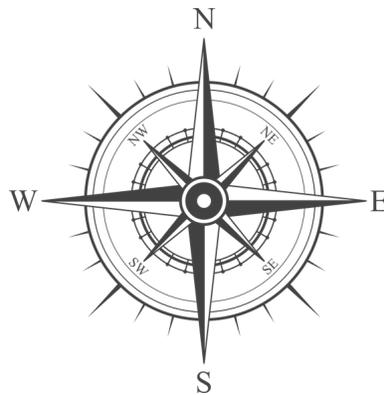
UNIT 8: MISSION, VISION, AND VALUES STATEMENTS

recommended reading

***Making Spiritual Sense,*
Scott Cormode**

Some congregations have mission, vision, and values statements in need of refreshment and reaffirmation. Some congregations have none. Some have statements that are inadequate to their fundamental task, which is to give leaders a true north as they make

choices, and to give the wider community a clear idea of who a church is and for what it strives. Whichever the case, working on statements about why the congregation exists (mission), the ideal toward which it strives (vision), and the principles that guide the way it carries out its shared work (values) is both focusing and energizing.



Discussing how authorization might work is a good exercise, sometimes neglected in a way that damages trust. Role clarity is key: whose role is it to make decisions about collective statements, and how can we work within that system for positive change? Many change initiatives fail because those who proposed new ideas – even great ideas – were not appropriately empowered by those with authority.

Every community is different in how it creates collective statements. An efficient way

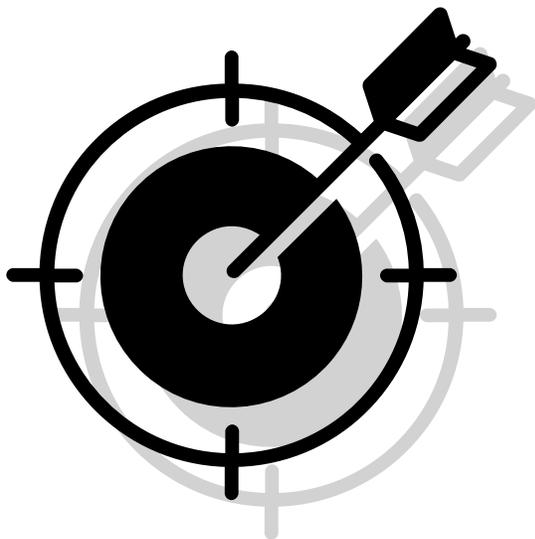
that works in most governance structures is through a designated task force. If it makes sense, the Working Group might seek authorization from its board (vestry, deacons, council) to function as a task force. The Working Group might then deliver their ideas to the board in the form of recommendations for action, just like a designated task force would. Then the board could either adopt, amend, or remand the recommendations back to the Working Group. In some polities, the board would then bring the statements to the congregation as a whole at an annual meeting for adoption.

If the church is not in a place where revisiting statements is a priority, Working Groups can simply work on statements as an enriching exercise in the midst of their work in capacity building for reflective practice and change leadership.

Mission Statements

A mission statement describes an organization's *raison d'être*, which is French for "reason to be." Good mission statements are brief, memorable, and written in the present tense. They are descriptive, with a focus on the what rather than the why.

A good way to come up with a mission statement is with an exercise involving a flip chart organized like the sample on the next page, and the Working Group populating it with the simplest descriptions of what it does.



Facilitator Notes:

Whether you are helping a congregation refresh, reaffirm, or create a mission statement, try the flip chart exercise to see what you learn about who the church is and why it exists.

We...	Verb	Object(ive)
	Worship	God
	Care	For and about each other
	Serve	The community beyond the church
	Love	Children and young people

Vision Statements

A vision statement describes what the community imagines the world would look like if its mission were fulfilled. What distinguishes a faith community from a secular organization is that the vision is not meant to come from the community or its leaders' minds; rather, a vision statement captures what the community interprets to be God's call.



One exercise that helps with visioning is called the Polaroid. Ask everyone in the group to shut their eyes while the leader guides them in a meditation like this: "Imagine our community fully alive. What do we see, smell, and hear? Who is there? What are they doing?" After opening their eyes, ask participants to describe what they imagined. Capture their words, for they were having visions.

Values Statements

16th Century political theorist Nicolo Machiavelli writes in *The Prince* that ends justify means. So long as the outcome is good, it does not matter how outcomes were achieved. Christian churches are not Machiavellian. How they carry out their work is a statement about who they are and what they believe. What can be difficult about creating a statement about values is narrowing down what values can be taken for granted, and which must be stated deliberately.

Here is a list of values that an organization might embrace. Of course, the group can add more. Each member of the Working Group should pick out the five they believe to be most important to the way the church does business and then discuss overlap and divergence among rankings.

values



Faithfulness

Justice

Compassion

Transparency

Fairness

Accountability

Kindness

Resilience

Hospitality

Trustworthiness

Truthfulness

Respect

Antiracism

Integrity

Acceptance

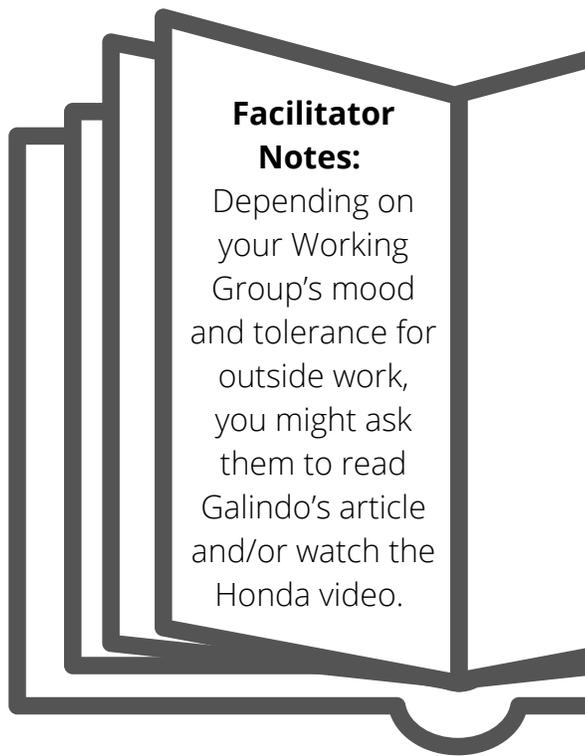
Open-mindedness

Warmth

Curiosity



UNIT 9: LESSONS FROM EMOTIONAL SYSTEMS THEORY



Facilitator Notes:

Depending on your Working Group's mood and tolerance for outside work, you might ask them to read Galindo's article and/or watch the Honda video.

recommended reading

**Galindo article:
"What's System's Theory Got to Do With It?"**

recommended viewing

Kirk Honda on Bowenian Theory,

<https://www.youtube.com/watch?v=Em1hFflk9hs&t=8s>

Many who study congregations embrace emotional systems theory as they seek to make sense of group dynamics. Emotional systems describe the way in which people in a community feed off one another's emotions, firing each other up or calming each other down as the case may be. Systems theory assumes that members of communities, from families to churches to whole bodies politic, are interconnected emotionally by channels that run deep below their surfaces. Those channels have personalities and lives all their own that transcend any individual's will or agency.

To build capacity for change leadership and reflective practices, it is important for the Working Group to have some familiarity with emotional systems theory. Why?

The alternative is the terrible mistake of thinking that emotions belong to individuals, or thinking that reason alone shapes whether a life-giving change will be embraced by a community. What follows is a glossary for emotional systems theory with terms most relevant to faith communities.

Homeostasis

Emotional systems resist change and fight for self-preservation. The system's equilibrium is like water seeking its own level; it will reestablish itself if physics is left to its own devices. Even if every individual in a faith community wants to see change happen, some individuals will sabotage change out of a deep need for things to stay the same. Why? Because the disequilibrium that lies between where a community is and where it endeavors to be can be a scary and risky place. Good leaders upset apple carts when communities are stuck in ruts, then help keep them calm as they make their way through disruption, all with the hopes that the life giving "new normal" is better than the rut was.

Emotional Triangles

Emotional systems do not operate in clear lines between individuals, but rather they function in triangles where conflict between two usually involves drawing in a third party. A simple case of triangulation looks like this: Melanie is angry with Merle and complains to Maura. Melanie feels better, having expelled the negative feelings she had, but now Maura feels worse because she received negativity about which she cannot do anything; she cannot change Merle.

More complicated triangles result in holding the wrong leaders responsible for that which they cannot control, or widespread division resulting from the taking of sides. To arrest the negative effects of triangulation, leaders are wise to educate communities about conflict management through conversation, and to align responsibility with power to carry responsibility out.

The Non-anxious Presence

Whereas many leadership practices described in this workbook relate to digging in, grabbing hold of reins, and working tenaciously, emotional systems do not need high-control styles of leadership. They need non-anxiety from the leader. Fear of

“Honest sharing leads to much more good than ill.”

getting feelings hurt stands in the way of good communication; a leader can model that honest sharing leads to much more good than ill. Fear of loss and grief prevent communities from trying new things. The leader whose affect expresses, “Why not?” is a leader who causes people to feel brave in the face of the unknown. The bad news is that the leader’s anxiety is contagious and spreads through emotional systems quickly. The good news is that nonanxiety is the same way.

The Identified Patient

Imagine this scenario: you have a relative who drives you crazy. At family gatherings, they hold forth and dominate conversation with self-referential anecdotes peppered with judgmental and offensive comments. That relative dies, and you feel a mixture of grief and relief. Then, at your next family gathering, a different relative adopts the same behaviors of the self-righteous departed.

This illustration is not about history repeating itself. It is about the way in which systems resist change so ardently that a vacuum will result in shifting casts of characters but no fundamental change. Furthermore, dysfunctional systems love their scapegoats. The disruptive and unpleasant family member was easy to blame, but why does the family put up with the relative who bullies and offends?

The obnoxious person is thus the “identified patient,” whereas the system as a whole is the “patient.” If the system is sick, one might become the symptom bearer of emotional unwellness. Then, that person becomes a convenient receptacle for blame. Leaders must resist the temptation to fantasize that “if only this person would go away,” change would be easy. For without systemic change, “this person” surely has an understudy waiting in the wings.



Group Exercise

Discuss together where emotional systems theory language can describe your congregation's current situation, using these questions as a guide.

1. How might we describe the status quo in our faith community? What is our current "normal"?
2. What experiences have we had with disruptions in the status quo, and how have we handled them?
3. What were the greatest fears we each had regarding disruptions? How did we and others handle that sense of threat?
4. Can we remember times when people have discharged anxiety through triangulation rather than frank, direct communication?
5. Can we remember times when we have recruited an "identified patient" to serve as symptom-bearer for our community's anxiety?
6. Where have we seen leaders' non-anxious presence in the face of disruption? How can this Working Group plant seeds of non-anxiety as it presents its learning more broadly?





UNIT 10: ENDING AND ANCHORING

Welcoming well, and saying goodbye well, are two of the most important practices for building a strong community. There was a time when faith communities were static entities over many years, where people came at the beginning of life to be baptized and left in a casket at life's end. Many communities carry unspoken shame that people do not stay forever as they once did and have failed to adopt positive rituals to mark hellos and goodbyes. This secret weight is particularly unfortunate considering that fluidity is the new norm across institutions. Most coming and going from churches, as well as other communities defined by voluntary covenantal commitment, relates to migration more than alienation.

The Working Group thus has an opportunity to model ending well. Even though the group will not disband in such a way that they will never see each other again, they will no longer be the Working Group, and it is to that shared identity that they must say goodbye.

Here is a simple, leave-taking ritual that includes self-assessment as well as closure.

Tally

- a. The facilitator names that the Working Group's project is coming to an end.
 - i. Name results of shared work that will carry on into the future.
 - ii. Review the group covenant with the question, "How did we do?"

Transformation

- a. The Facilitator then invites each participant to say something that they have learned through being part of this process of capacity building toward reflective practice and readiness for change.

Ideally, the example should be something that will change the way the member of the working group lives, works, and continues in leadership in church and elsewhere.

Testimony

a. Each person in the group is then invited to give a shout-out to another person in the group for something good they did that made a positive difference in the process.

Terminate

a. The Facilitator invites everyone to extend their hands to each other in a gesture of sending forth while saying a benediction – a “good word” – to all.

b. Words of blessing are intentionally final, with full acknowledgement that a chapter is ending and the Working Group is setting a role down.





BOOK RECOMMENDATIONS

Reading Recommendations

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*Honda, Kirk on Bowenian Theory. <https://www.youtube.com/watch?v=Em1hFflk9hs&t=8s>

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*Specified in curriculum units as recommended reading.

