



Susan Beaumont
& Associates, LLC

Equipping Leaders. Aligning Resources. Engaging Mission.

How To Lead When You Don't Know Where You're Going

Online Format

Rev. Susan Beaumont

www.susanbeaumont.com

susan@susanbeaumont.com

www.facebook.com/SusanKBeaumont

www.twitter.com/Susan_Beaumont

Course Objectives

Course Description:

What do you do when change management does not work? When you are stuck between something that has ended and a new thing not yet born. You do not fully understand where you are or where you are headed.

Welcome to liminality- a state of ambiguity and disorientation that occurs in transition periods. Neither here nor there, you are caught between established practices that no longer work and new processes not yet clear.

Liminal seasons call for a different kind of leadership presence, one that connects the soul of leaders with the soul of the institution.

The soul of the institution is the authentic and truest self of the institution, the source of divine calling, and the protector of institutional integrity.

This workshop will explore the unique challenges of connecting the soul of the leader and the institution with mission, vision and values.

What You Will Experience:

- Enter a three-way conversation engaging God, the soul of the leader, and the soul of the institution.
- Examine the inherent leadership challenges and opportunities in liminal seasons.
- Explore three fundamental shifts in orientation that invite a more soulful leadership presence. (From knowing to unknowing, from advocating to attending, from striving to surrender.)
- Understand four bodies of work that help to connect mission, vision and values with the soul of the organization: clarifying purpose, tending institutional memory, deepening discernment and engaging emergence.
- Reflect on and reshape the institutional memories that may be preventing your organization from connecting with its mission, vision & values.
- Explore the cycle of upheaval, disturbance and dissonance that eventually makes way for new order.

Leading in a Liminal Season

***Liminality:* A quality of ambiguity and disorientation that occurs in transitory situations and spaces, when a person or group of people is betwixt and between something that has ended, and a new situation not yet begun.**

During liminal seasons, we occupy space on both sides of a boundary or threshold. We have one foot rooted in something that is not yet over, while the other foot is planted in a thing not yet defined, something not yet ready to begin. We function with structures, identities and relationships formed by our old experiences, although we know that those structures and processes will not serve us adequately in our present reality or in the future.

Liminality is more than new people in new roles, or organizations going through transition. Liminality can describe the state of an individual, a place, an organization, or an entire institution evolving. In fact, liminality can describe the disorientation of an entire era or civilization.

The Origins of Liminality:

Liminal space is that space that human beings hate to occupy... where the biblical God is continually taking us. -Richard Rohr

Derived from the Latin *limen*, meaning “a threshold; the bottom part of a doorway that must be crossed when entering a building.” Latin *limen* originally meant a stone placed on the threshold of a door that physically had to be mounted to cross from one space into another.

Present usage stems from the field of anthropology:

- Arnold Van Gennep (1909) *Les Rites de Passage*.-rituals in small-scale societies.
- Victor Turner (1960's): Expanded usages of the term to the social, political and behavioral sciences.

Liminality always involves a three-part transition structure:

- 1. Separation:** A period in which a person, group or social order is stripped of the identity, social status and structure that previously limited and defined.
- 2. Liminal Period:** A disorienting period of non-structure or anti-structure that opens up new possibilities no longer based on old hierarchies and status. New identities are explored, new possibilities considered. (The focus of this workshop.)
- 3. Re-assimilation:** A reforming period in which the person, group or social order adopts a new status and structure more appropriately suited to a changed environment or an emerging identity.

Liminality in Organizations

Liminal Contexts: Pilgrimage, Mission Trips, Summer Camp

Liminal Seasons: Pastoral Transitions, Building Projects, Mergers, Consolidations

Liminal Eras/Epochs: The Great Reformation, and...now?

Degrees of Liminal Tolerance: The extent to which existing structures and spaces can stand against the pressure of disorientation. The greater the number and degree of simultaneous liminal experiences, the greater the felt experience of liminality.

Pure liminality: When temporal, spatial, personal, group and societal forces all move into a liminal state at the same time. When this occurs, the disorientation is severe and existing structures have difficulty holding together. Structure gives way to anti-structure. Organizations and institutions collapse.

***Thesis:** We are living in a liminal era which is not likely to end anytime soon. This season requires a non-traditional leadership stance and a different body of leadership work.*

Leading in a Liminal Season

“There is a sweet spot between the known and the unknown where originality happens; the key is to be able to linger there without panicking.”-Ed Catmull (Pixar)

Opportunities in a Liminal Season:

- **Communitas:** A state of relationship that occurs in an unstructured community. Hierarchies dissolve. People become equal. The very soul of the community itself emerges. Fellowship, spontaneity and warmth emerge as a new ethos of interrelatedness breaks forth.
- **Innovation:** The organization is more willing to examine, reinvent and take risk as long-established structures and processes unfreeze.
- **Rediscovery of the core:** What matters most to us? Who are we when we are at our best? What will not change about us? What needs to evolve?
- **Cultivating collective wisdom:** How do we know what we know? What do we know and what can we observe beyond our habitual patterns of knowing and doing?

Threats in a Liminal Season:

- **Anxiety rises:** How do we keep anxiety in a productive and useful zone of disequilibrium? What happens if there is too much anxiety?
- **Denial: Powering through** as if nothing has changed. The anxiety moves underground, and we revert to status quo behaviors that no longer serve us well.
- **Changing power dynamics.** Leaders who have been at the core often move to the edges and those who have been at the edges move into the center.
- **The emergence of tricksters:** Charismatic figures who look like leaders, but they are incapable of giving and sharing or participating well in a democratic process. Their behaviors are almost always self-serving, and they lack deep commitments to the welfare of the organization.
- **Leadership rejection:** When people are anxious, they often turn on their leader(s). The leader needs to stay alive to lead another day.

Exploring This Liminal Season

A Journaling Exercise:

Find a quiet space to sit with your thoughts and your journal. Begin by reflecting on the ways in which your organization has become liminal. Pandemic and racial justice reckoning have moved all of us into liminal space. What other factors specific to your local context are adding to your experience of liminality?

Then, journal your response to these 10 questions:

Exploring what has been lost:

1. What were we on the verge of discovering or accomplishing before the onset of this liminal season? What needs to move forward in different ways now?
2. What was possible before that may not be possible for some time-if ever?
3. What seemed important before that feels superfluous now?

Examining your unstated assumptions:

4. What was undervalued before that may hold greater value now?
5. What mattered about geography before that no longer matters?
6. What margin or lack of margin was built into our old model of doing church? What new abundance are we experiencing now? Where are we experiencing scarcity now that was not evident before?

Imagining what wants to emerge?

7. What is our greatest asset now?
8. What relationships will we need to build on or strengthen in the months ahead?
9. What unique role might our congregation play in local, national, and even global recovery?
10. What long term changes in the bigger picture would we like to be part of bringing to fruition?

Leading in a Liminal Season

Exploring Three Related Concepts

- **Liminality:** A state of ambiguity and disorientation that occurs in transitory situations and spaces.

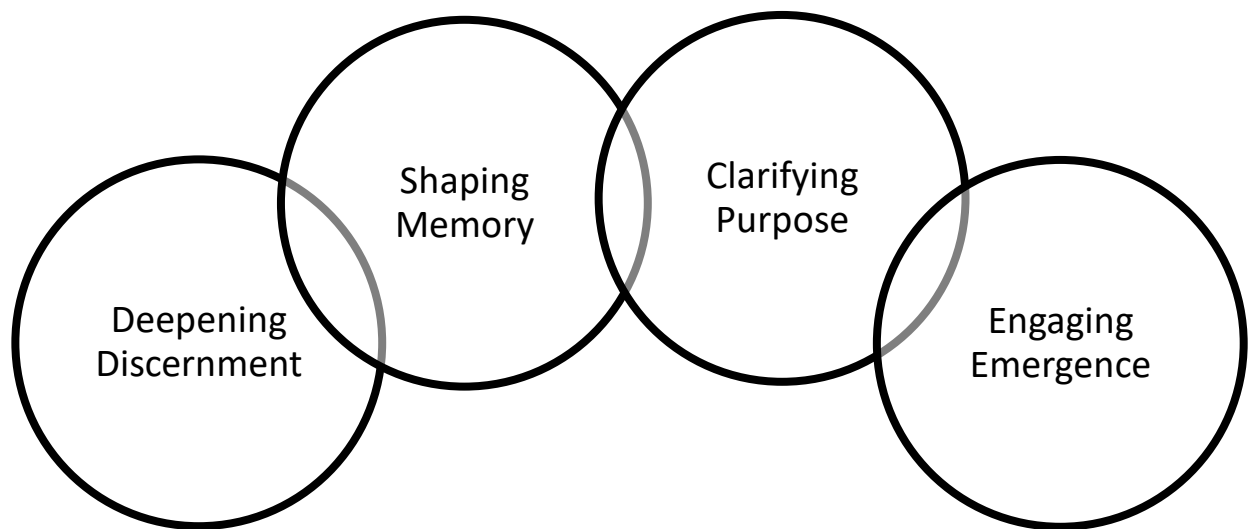
- **Leading with Presence:** A fundamental leadership stance grounded in a sense of wonder and open to the leading of the divine.
 - Refuses to acknowledge the false dichotomy that we have created between organizational leadership and spirituality.
 - Seeks to infuse good organizational leadership with a contemplative leadership stance.
 - Assumes that God cares about what we do in institutional settings- beyond simply operating with strong moral character.
 - Trusts that the Holy Spirit will guide our collective actions if we yield control.
 - Embraces the soulfulness of the institution.
 - Honors the interaction of the soul of the leader and the soul of the institution.

- **Tending the Soul of the Institution:** A body of leadership work that invites us to access the divine spark within the institutions we lead.
 - Deepening Discernment
 - Shaping Institutional Memory
 - Clarifying Purpose
 - Engaging Emergence

Tending the Soul of the Institution

The soul of the institution is the authentic and truest self of the institution; the source of its divine calling, and character; the protector of institutional integrity.

Institutional Soul-Tending Involves Four Bodies of Work:



Deepening Discernment: Yearning is the language of the soul. The soul of an organization often expresses itself through the collective yearning of its membership body. Soul tending work requires sharpening group discernment skills, it requires deeper listening as collective yearning finds expression.

Discerning on behalf of the whole and with the soul raises some challenging issues. Who is authorized to speak on behalf of the soul of the institution? How does daily decision making relate to discernment? Where do we locate discernment in the life of the institution? Leaders must respond to these questions as part of authentic soul-tending work.

Institutional Soul-Tending: A Working Definition (cont.)

Shaping Institutional Memory: Poet and theologian John Donohue wrote that “soul is the place where memory resides”. The soul of the institution is stable, but not static. It has been on a journey. That journey includes clarifying moments and wounding moments.

Wounding moments in an organization’s past diminish its future capacity, if left unexplored. Within the soul of the organization lies a capacity for the rediscovery, reframing and healing of memory. There is generative capacity in the rediscovery of foundational memories that have long been forgotten. Through work with lost or damaged institutional memory, through story an organization can rediscover its purpose, values, and integrity.

Clarifying Purpose: The integrity of our mission and purpose is protected by the soul of the institution. Who are we? Who do we serve? What is God calling us to do or become next? The soul of the institution knows the answers to these questions. Leaders who discern these questions authentically, on behalf of the soul, ensure institutional integrity and gives rise to distinctive values that guide organizational decision making.

Engaging Emergence: Emergence is a naturally occurring process in which order arises out of chaos. Anytime a group interacts in conditions of upheaval, disturbance or dissonance, a moment arises when disorder gives way to order. Something new emerges, a higher order pattern, a decision, a structure, or a change of direction. Innovation happens naturally in the face of complexity if we allow it.

Emergence follows a predictable pattern in liminal seasons: disturbance, disharmony, innovation, coherence, and adoption. We cannot control or manage emergence, but we can lead people through it with an appropriate soulful stance.

Leading with Presence

**(Adapting Your Leadership Stance
for a Liminal Season)**

“Foundational to bringing spiritual discernment to a decision, a reflective inner disposition must be cultivated. Far from being a template that can be pulled out of a bag of tricks at the moment it is needed, spiritual discernment grows out of ongoing inner preparation.”

–Margaret Benefiel, Soul at Work

Traditional Leadership Stance

Task	What the leader is expected to do:
Direction	Provide problem definition & solution
Protection	Protect from external threats
Order	
Orientation	Orient people to current roles
Conflict	Restore order
Norms	Maintain norms

Source: Ronald Heifitz, Alexander Grashow, & Marty Linksy, "The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World." 2009. Boston: Harvard Business Press.

Institutional vs. Contemplative Leadership

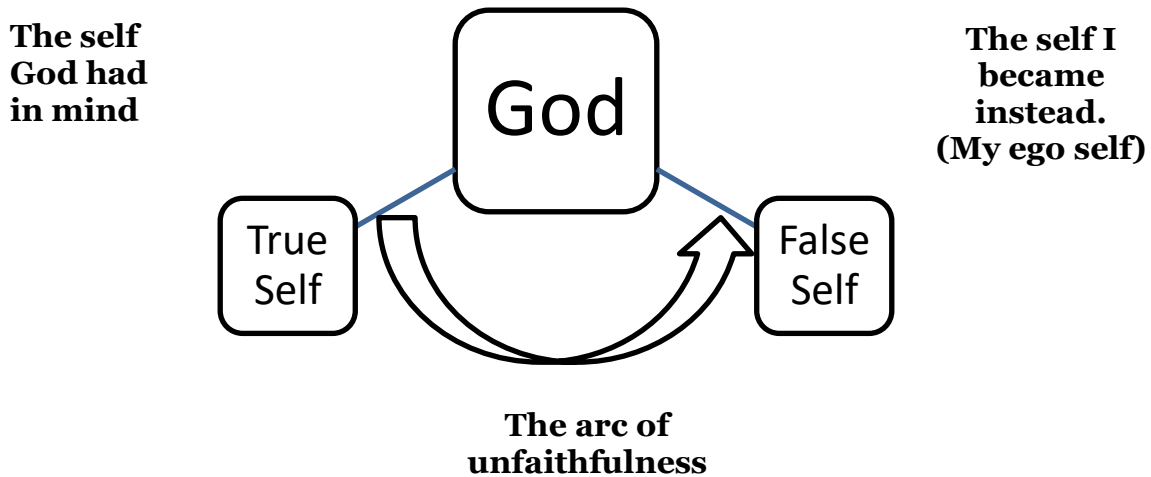
Are they inherently at odds with one another?

Organizational Leadership Traits	Contemplative Leadership Traits
<p style="text-align: center;"> Visionary Strategic Decisive Goal-Oriented Purposeful Future- focused Collaborative Engaging Risk Taking </p>	<p style="text-align: center;"> Authentic Patient Open Flexible Yielding Present-Centered Unknowing Trusting Discerning </p>

An **effective organizational leader** doesn't wait for perfect clarity to emerge but acts decisively as soon as enough information becomes available. She is certain about herself and the organization's mission. She brings a strong sense of personal vision and knowing, and acts with conviction to align structure and resources around strategy. Her energy and her passion fuel the work of the whole.

Contemplative leadership, on the other hand, is less concerned with the form and structure of a thing; it cuts through the organization to consider the essence and source of the soul. **Contemplation is a state of being that is simultaneously wide-awake and free from preconceptions. It is wonder-filled, prayerful intuition that nurtures a simple willingness to be open to God's movement, leading, and invitation.**

The True and False Selves






The Three-fold Journey to Renewal

1. Letting go of the false self, the persona, the mask, the personality we have so carefully crafted, knowing it is not the person God had in mind at our creation, and acknowledging that we have lost our way and cannot find our way back as an act of will.
2. Falling downward into God, where we rediscover the true self, recover our sacred center, reclaim our “true name”, our “self, hidden with God in Christ”;
3. Emerging outward toward living a life more faithful to our truer self, never perfectly or completely, but daily retracing this journey to and through and from our sacred center.

The leader and the institution each have a true self and a number of false selves. Tending the soul of the institution requires the true self of the leader calling forth the true self of the institution.

Adapted from : The teaching of Thomas Merton, as taught by Sister Sharon Doyle and as presented by Howard Friend Jr. in Recovering the Sacred Center.

Leading with Presence: Three Shifts in Spiritual Stance

From Knowing		To Unknowing
From Advocating		To Attending
From Striving		To Surrender

- 1. From Knowing to Unknowing:** Traditional practices of leadership invite a leader to apply the best of what they know to an identified problem or challenge.

In “unknowing” we cultivate the capacity for slowing down our thinking, observing our thinking patterns and recognizing our own compulsions, ego-centric concerns, and short-term investments. We observe our judgments and the categories of thinking that we have come to rely upon to make meaning of our experiences.

- 2. From Advocating to Attending:** Traditional leadership practice expects leaders to advocate for a vision, a position, or an outcome. Leaders are often selected based on their ability to advocate for a constituency, a mission, or a status quo.

Attending is a shift in perspective that arises from stillness. Instead of advocating for a particular outcome or constituency, I am fully present to myself, to God, and to the whole of the institution. I can listen from a true center, not from my false ego self.

- 3. From Striving to Surrender:** Leadership, particularly in today’s environment, is often an exercise in hard work and striving towards an idealized future. We do our best to push towards excellence, for ourselves and the organizations we lead.

Surrender is a conscious act of acknowledging and welcoming our present reality, for all that it must teach us and for all of the ways it can mold us. It is not the same thing as giving up.

Leading with Presence

Practice: Drawing Empty Space

It's difficult to see our True Self because it is so close to us. We overly identify with our false self, our egoic ideas about who we are, missing the forest for the trees, as it were. The True Self is hidden and must be sought out. With practice, we can learn to see differently, to shift our focus. This simple exercise plays with our usual way of perceiving reality and invites an inner change in how we see ourselves, the world, and the Divine.

Sitting at a table with a pencil and a piece of blank, unlined paper, look at a nearby object (for example, a vase of flowers, a chair, a tree outside). Turn your attention to the empty or “negative” space surrounding the object. Rather than focus on the object's contours, look at the lines and curves of the space butting up against the object, the places in between and around the thing itself. Breathe deeply and begin to draw these nooks and crannies of air and emptiness. Keep your focus on the “negative” space as you draw.

You might draw all the spaces around the object or spend just a few moments drawing. When your pencil comes to a stop, observe the form and detail of the “nothingness” you have drawn. Know that your True Self, though perhaps less visible than ego and persona, is spacious and objective. Let your inner witness quietly observe the “negative space” within yourself. Rest in this abundant emptiness, full of Presence.

Gateway to Silence:

I am love.

Reference:

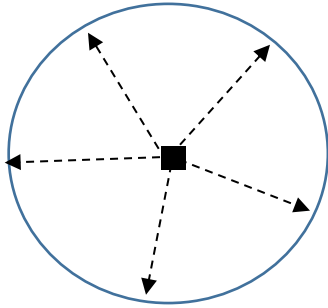
Adapted from Richard Rohr, *A Spring Within Us: A Book of Daily Meditations* (Center for Action and Contemplation: 2016), 95-96.

Posted in Daily Meditations from the Center for Action and Contemplation on August 12, 2017.

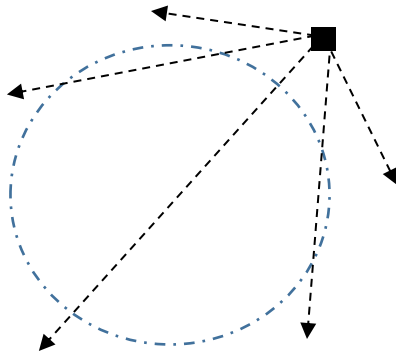
Releasing That Which Binds Us

How can we shift our attention so that we connect to our best future potential, instead of continuing to operate from the blind spots of our past and our ego?

Shifting the Field of Attention/Awareness



Staying in patterns of the past-viewing the world through one's habit of thought (knowing, advocating, striving.)



Attending to the situation from the whole-the boundary between observer and observed collapses, the system begins to see itself in relationship to itself, its environment, and its divine purpose. Boundaries become porous. (unknowing, attending, surrender)

Adapted from: C. Otto Scharmer, "Theory U: Leading From the Future as it Emerges". San Francisco: Berrett-Kohler Publishers. 2009.

Releasing That Which Binds Us (Cont.)

Requires Examining Our Blind Spots

Blind spot = the inner place or source from which we operate.

Our blind spot forms the source and quality of our attention; it is the inner place from where our actions come; the source of our awareness

Leadership Instruments Available to Us	Capacity Required	Barriers to Engaging	Barrier keeps us locked in the state of...
Open Mind	Intelligence Quotient	Voice of Judgment	Knowing
Open Heart	Emotional Intelligence	Voice of Cynicism	Advocating
Open Will	Spiritual Intelligence	Voice of Fear	Striving

Three Internal Voices that Create our Blind Spots:

The **Voice of Judgment** (VoJ) is intellectual. It tries to seal off the mind & protect the status quo. It prevents creativity. It wants to keep us in a knowing stance.

The **Voice of Cynicism** (VoC) is born of mistrust. It tries to seal off the heart from vulnerability. It wants to keep us in an advocating stance.

The **Voice of Fear** (VoF) blocks the gate to open will. It seeks to prevent us from letting go of what we have. It wants to keep us in a striving stance.

Source: C. Otto Scharmer, "Theory U: Leading from the Future as it Emerges". San Francisco: Berrett-Kohler, 2009.

Releasing the Binding Voices

Name a leadership challenge that you face in the organization that you lead.

Now, give each of the following voices three minutes of free reign inside your head. What would each voice say to you about the leadership challenge before you. Write down your thoughts.

- **Voice of Judgment:** (Blocks the open mind: keeps us in a state of *knowing*)

- **Voice of Cynicism:** (Blocks the open heart: keeps us in a state of *advocating*)

- **Voice of Fear:** (Blocks the open will; keeps us in a state of *striving*)

Set aside your paper and pen. Enter the silence. Sitting aware on the edge of mystery, with God as your companion, invite yourself to release the voices of judgment, cynicism and fear.

Locating Soul in the Institution

The soul of the institution is the divine spark within the organization that inspires ministry and invites transformation. The soul of the institution is the authentic and truest self of the institution, the source of divine calling, and the protector of institutional integrity.

-Susan Beaumont

“There is in all visible things an invisible fecundity, a dimmed light, a meek namelessness, a hidden wholeness. This mysterious Unity and Integrity is Wisdom... There is in all things an inexhaustible sweetness and purity, a silence that is a fount of action and joy... This is at once my own being, my own nature, and the Gift of my Creator’s Thought and Art within me.”

Thomas Merton (Hagia Sophia)

Does an Institution have a Soul?

“I think Teresa (of Avila) and John (of the Cross) would have been entranced by twentieth-century social systems theories, which propose that any grouping of people is more than the sum of its parts; it is a system with its own life, an entity in many ways like a person. Each family, community, church, business, even nation or culture has characteristics and experiences that constitute a life of its own. Like the individuals who make them up, groups can be seen as growing and learning, yearning and dreaming, decaying and dying. An obvious question in this context is whether social systems might be said to have (or be) souls, ... If a group derives its being, energy, and characteristics from the mutual interactions of its constituents, then it can be said to have at least some soul qualities.”

Gerald May-The Dark Night of the Soul

“It would appear that the angel is not something separate from the congregation, but must somehow represent it as a totality.”

“What the ancients called the angel of a collective entity actually answers to an aspect of all corporate realities: they do have an inner spirit, though our culture has been trained to ignore it... The angel encompasses both what the church is –its personality-and what it is called to become –its vocation.”

Walter Wink- Unmasking the Powers

“Church, before it is a geographical location or even a gathering of people, is a quality of time and space. Before it is worship, program, and organization, it is climate, tone, feeling, and atmosphere. It is, or tragically it is not, sacred space, holy ground, sanctuary-a quality of place. It is, or is not, Sabbath, kairos-a quality of time.”

-Howard Friend-Recovering the Sacred Center: Church Renewal from the Inside Out

”In contrast with the disembodied notion of *spirit* ..., *soul* calls us back into our bodies, inviting us to revel in our own particularity and that of other embodied beings. In contrast with ivory-tower idealism, soul asks us to embrace “what is” and endows us with creative energy when we reclaim those aspects of life we have disowned. In contrast with ideological purism, soul is the junction where the dueling demands of economy and ecology may become grounded and properly connected. And in contrast with the illusion of self-mastery, soul expresses itself in multiple voices and surprising eruptions, never finally yielding to ego-control. This richly suggestive language has helped me to understand the critical role of “place” in human soul-making.”

-Alice Mann-Befriending the Soul of Place

Soulful Questions for Institutional Leaders

Take these questions on, one question at a time, for as long as it takes to live into the question.

Breathe deeply...

Sitting aware on the edge of mystery,
With God as your companion,
Sense the soul of your congregation...

And then prayerfully consider each of the following questions:

1. Do you recall any dreams (or thoughts upon waking) about your organization that seems to invite prayerful attention?
2. Read over the history of your organization, stopping when it seems right. At what points did or do you experience God as your companion? What is the holy story of this organization?
3. Have you and your organization ever lost something and then found something that, in retrospect, seemed very precious?
4. Notice what kinds of difference between people stand out in your organization. What are the effects of those differences on the community?
5. As you listen to the people of this organization, do you hear anyone speaking of an experience like seeing God in the face of the other?
6. Is there any way in which the “being” of your organization is not something you and others have simply constructed, but something that is given to you to live?
7. Picture the people of you congregation leaving the altar, walking out the door, and returning to the ministries in their daily lives. What do you see as you follow that image?
8. Do you have any sense of how your organization is gathered by God to be Church in this place?
9. Open your heart and mind to the giftedness of your organization. What have you as a corporate body been given? Give thanks.
10. Let your mind go back over a painful place in your organization’s own life. Has any strength been given to you through this time? Is more healing needed?
11. What are some of your connections between your sense of relationship with God and your spiritual leadership in the organization?

Source: Celia Allison Hahn, “Uncovering Your Church’s Hidden Spirit”. An Alban Institute Publication, 2001.

Soul & Institutional Charism

Exercise & Reflection:

The charism of a religious organization refers to the distinct spirit that animates the community and gives it a character. A charism is part of the permanent heritage of a community, which includes the rule, mission history, and traditions kept by the community over time. The charism of the community is such that if all written records were destroyed, it could be re-created through the living testimony of its members.

The charism of a religious community is its personality within the larger Church — that which makes it distinctive and sets it apart from others. Who we are, what we do and how we do it, are inextricably linked to our history.

What is your organization's story? What is the charism that is rooted in your congregation's story? How has the charism of the organization re-asserted itself throughout its history?

Using various art supplies available to you, (clay, play dough, construction paper, cardboard, chalk, paints, markers, rubber bands, pipe cleaners, paper clips, etc.) create a three-dimensional image of the soul or charism of the organization you lead.

-or-

Using images cut from magazines, create a collage that represents the soulfulness or charism of the organization you lead.

1. What do you find most surprising about the image you have created?
2. Which parts of this image are you most drawn to?
3. Which parts of this image most frighten or intimidate you?
4. Which part of this image do you invest most of your time and energy in?

Discerning the Angel of the Institution

A. Describe the angel of your organization.

- a. Read Revelation 1:1-2. Each of the letters to the seven churches included in the book of Revelation, are addressed to the angel of the church. In the book of Revelation, the “angels” of the churches represent the inner nature, the “within-ness” of a church, the soul, the collective personality.
- b. Invite group members to brainstorm some of the characteristics of the angel (the organization-as-a-person). Record their responses, in writing, on a white board or flipchart at the front of the room. Invite both positive and negative characteristics.

B. Draw the angel.

- a. Begin with 5 minutes of silence, for group members to discern the features of this angel on their own. Invite people to move to a place in the room that allows them to be comfortable in their silence.
- b. Provide each participant with art supplies and blank easel paper. Invite them to create an image of the angel. Advise them to let the colors choose them. The pictures may be abstract or concrete. Encourage people to get over their fear of being judged on their creativity. We don't care about artistic quality in this exercise.

C. Share the Pictures. Discern common features and record these collective features on the group newsprint.

D. Write a letter to the Angel. Individuals take pen and paper and find a place in the room to write privately. The group leader reads Revelation 1:9-17. The group leader says, “Ask yourself what in “you” needs to die in order to receive the message of the Son of Man to the angel of _____.” Pause, to let group members think about that. Then the leader says, “When you are ready, begin to write what the son of Man says to the angel of your organization.”

E. Meditation. When all are through writing, begin this guided meditation.

Visualize the Son of Man walking in the midst of your organization, seeing everything (silence). See his supernatural light filling every corner of the buildings, every cell of each person. See it bathed in divine light (silence.) Visualize that light becoming more and more intense, transforming every part of the organization (silence). Trust that God can actually bring this miracle about (silence). Trust God for it, in advance, and begin to live out of this vision of the church transformed (silence). Let go of all responsibility to change your church by yourself. Praise God for bringing it about (silence). Amen.

(Continued on the next page...)

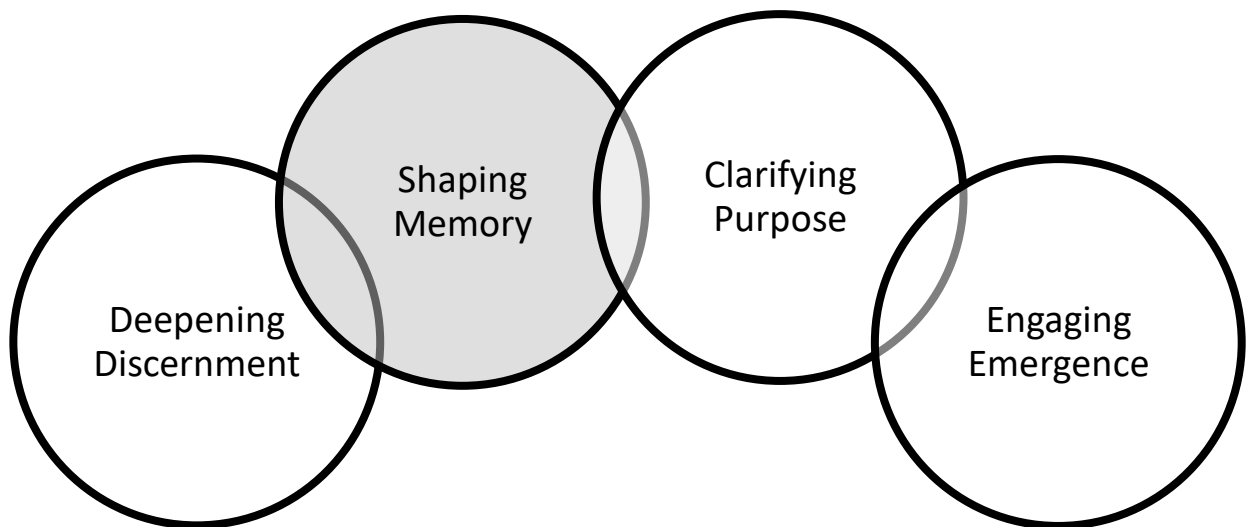
Discerning the Angel of the Institution (Cont.)

F. Noticing Common Themes. Share the letters to the angels, and anything else that emerged for people during the guided meditation. Again, look for common threads. Begin a new sheet of newsprint at the front of the room. Write the heading “Callings/Yearnings”. Record those themes that emerge with a lot of energy.

G. In Closing. Ask participants to continue praying for the organization after they leave this session.

Source: Adapted from Walter Wink, “Transforming Bible Study” (Nashville: Abingdon, 1980)

Shaping Institutional Memory



*God made man because he loved stories.
-Elie Wiesel*

The Power of Stories to Bind/Unbind Memory

Storytelling is the single most powerful form of human communication. It is the primary tool that human beings use to pass on their cultures. We can use it to inspire, teach, comfort, and entertain. Or we can use it to destroy, stir up hate, and demoralize. Jesus Christ and Adolph Hitler were both great storytellers.

-Peg Neuhauser

Where story gets its power:

Story does what facts cannot do:

Most of us have more facts than we can effectively process.

When making choices and decisions, most of us don't need more facts. What we need is help in finding the wisdom to apply those facts. Facts themselves are value neutral.

Stories help us make meaning out of the facts that we already have.

Story delivers a context so that facts can slide into new slots of the listener's brain.

Stories make messages more memorable

Stories engage the whole brain. Stories allow a person to feel and see the information as well as factually understand it. The assumption is that because you "hear" the information factually, visually and emotionally, it is more likely to be imprinted on your brain in a way that sticks with you longer with very little effort on your part.

Stories make information more believable

Research shows that people find stories more believable than a straightforward presentation of facts.

Story allows you to speak truth without accusing.

Consequently, stories allow us to surface and challenge unstated assumptions in the congregation's culture. They also help us to talk about the gap between espoused and enacted values.

Storytelling enhances analytical thinking

Storytelling doesn't replace analytical thinking. It supplements it by enabling us to imagine a new perspective and is ideally suited to communicating change and stimulating innovation.

The Journey of the Soul is Captured in Story



Divine Spark: A pure expression of the divine purpose of the institution, unencumbered by institutional memory. Pure wisdom.

Founding Vision is often a good indicator of the divine spark of the soul. An idea is born, experiments are undertaken and learned from, resources are allocated, and an organization is established. The vision, purpose and values of the organization are in near alignment with the vision and values of the leader. The culture and the spirituality are simple expressions of the divine spark.

Leadership Transitions: With each generational shift in leadership the organization becomes increasingly removed from the simplicity of the founding vision. The culture and spirituality develop layers of meaning that require interpretation. It becomes more difficult to identify the divine spark.

Wounding and Strengthening: As the organization lives through successive eras, the soul experiences seasons of wounding and strengthening. Sin, betrayal, misconduct, pride, shame, cynicism and fear are built into the narrative of the institution.

Dark Nights and Glory Eras: The institution experiences seasons of life during which God appears to be absent from the work of the institution. Alternately, other seasons of work and ministry feel richly Spirit led. Leaders create narrative to make meaning of each of these chapters, and the narratives become institutional history.

Liminal Seasons: Seasons when the organization is naturally more receptive to rediscovering and working with the Divine Spark. During these seasons there is openness to work on narrative tending, mission, vision and values clarification. Liminal seasons often occur during fallow chapters: during leadership transition, after a significant organizational failure, following the completion of a major project, etc.

Adapted from John H. Mostyn, CFC in “Transforming Institutions: God’s Call- A Director’s Response” in [Tending the Holy: Spiritual Direction Across Traditions](#), editor Norvene Vest. New York: Morehouse Publishing, 2003.

Six Conditions That Bind Stories and Soul

When the soul of the institution becomes bound by any of these conditions, the institution loses its capacity for unknowing, attending, surrender, and discernment. It loses its capacity for listening to soul.

Sin: That which is separating the institution from God. “Sin entraps and enslaves, distorts and destroys, invades the body and darkens the heart. It perverts and separates. It is falsehood and deception.” (Howard Friend, Jr., Recovering the Sacred Center)

Four metaphors that describe institutional sin:

- Sin as disguise; pretending to be something other than who we are meant to be
- Sin as forgetting; faithfulness is associated with remembering who we are in relationship to God; in relationship to the community we serve; the corruption of our authentic memory
- Sin as blindness; a metaphor for unfaithfulness, stubbornness, slowness to believe
- Sin as inauthenticity; drifting away from the organization that God has intended us to be; our core values; our purpose

Shame: Shame is the intensely painful experience of believing that we are flawed and therefore unworthy of love and belonging. Shame is the fear of disconnection. Shame derives its power from being unspeakable. (Brene Brown: Daring Courageously)

The institutional soul suffers from shame when there are parts of the historical narrative that remain unexplored and therefore unspeakable. The soul carries a scar from some wrongful act committed in a past season, such as institutional racism, sexism, sexual misconduct, unchecked bullying, etc. Or the shame may stem from the simple fact that decline in the institution has happened on our watch, and we have let a vibrant institution slip below the threshold of change.

Pride: Pride is a falsely elevated sense of what is due to us by virtue of our status or position. An inordinate opinion of our own self-worth based on pre-conceived notions of wealth, superior talent, position or some other advantage in the world.

Institutional soul is wounded by pride when our shared narrative is rooted in false superiority, when we believe that we are somehow set apart and specially gifted over others. False pride prevents the institution from facing its mistakes, acknowledging failure and consequently learning from failure.

Six Conditions That Bind Stories and Soul (cont.)

Judgment: The condition of judgment blocks the open mind of the institution. Like pride, its counterpart, judgment is vested in protecting what it already knows and understands. Judgment precludes the development of wisdom.

A judging institution adopts a superior sense of its knowledge and its positions. It is resistant to attending, presencing and discerning behaviors, because it already knows everything it needs to know, and has dismissed alternative perspectives.

Cynicism: An institution that has become cynical has lost its sense of hope. This institution is inherently distrustful, bitter, contemptuous, pessimistic and unyielding. It will often disparage or distrust the motives and the experiences of others.

When the soul of the institution has become cynical it will protect itself at the heart level; blocking emotion and any heartfelt expression of its purpose, memory or calling.

Fear: Institutions often lose their capacity for soul-tending when they become fearful. A sense of impending danger, threat, evil, or dread becomes over-whelming and incapacitating. The threat may be real or imagined.

When an institution becomes fearful, it loses its capacity to work with an open will. The fear based institution grasps at what it already has. It operates with a sense of scarcity and is unwilling to take risks or explore new options.

Memories Preserved in Story

Story Type	Story Message	Examples
Hero Stories	The main character has done something beyond the normal range of achievement and experience.	
Survivor Stories	Everything went wrong and we fixed it... We survived against all odds...	
Who We Are Stories	These stories may be positive or negative. The positive stories are filled with pride, enthusiasm and even exaggeration. The negative stories may berate, bemoan and blame.	
How We Do Things Stories	These stories tell about individuals or teams of people in the congregation who are famous for running the operation. They may be positive (people who accomplished extraordinary feats) or negative (people who stood in the way of progress).	
Kick in the Pants Stories	These stories may often be experienced as negative, but they can actually be very positive for the congregation. They are the stories that tell about dangers, mistakes, missed opportunities or shortsightedness. The purpose of the story is a call to action.	
Steam Valve Stories	Steam valve stories are often positive for the people who tell and hear them; they help to reduce stress and they can build camaraderie. You would generally not want these stories repeated outside the congregation. They would sound disrespectful or rude outside of the group telling the story.	

Is it a Positive or Negative Story?

Most stories that are told in congregational settings can be told positively or negatively. The story can be framed in such a way that it strengthens, ennobles and inspires commitment; or the story can be spun in a way that binds, diminishes, demoralizes and detracts from the mission of the congregation.

According to Peg Neuhauser, what determines whether a story is positive or negative has to do with the *outcome* or *message* behind the story.

You have a POSITIVE story when the person who heard the story walked away better off for having heard it (learned something, felt proud, lowered tension etc.)

You have a NEGATIVE story when the people who heard this story walked away worse off for having heard the story; or the congregation was damaged in some way by the telling and repeating of the story.



Do NOT make a determination about whether or not a story is positive by paying attention to *style* and *topic*. A ‘how we do things’ story may be upbeat and cheerful in tone and still be a negative story, because of what people learn from hearing the story. Likewise, a ‘Kick in the Pants’ story may sound like bad news and disaster on the surface, but actually represents a positive lesson learned. Steam Valve stories often appear negative on the surface, but they generally embrace some very positive values that the congregation holds.

Source: Peg Nuehauser, “Corporate Legends and Lore: The Power of Storytelling as a Management Tool”, 1993.

What Story is Your Organization Telling?

Type of Story	Name of Story	Is it + or -	What values does it teach, or what unstated assumptions does it reveal?
A 'Hero' Story			
A 'Survivor' Story			
A 'Who We Are' Story			
A 'How We Do Things' Story			
A 'Kick in the Pants' Story			
A 'Steam Valve' Story			

Unbinding the Story

Select one of the stories that you captured on the previous page. Rewrite the story in the space below so that it is a more powerful and positive story for your congregation to tell in its present context. As you reframe the story, think about:

1. What do you want your listeners to *feel* after they have heard the story?
2. What do you want listeners to *remember from* the story?
3. What do you want listeners to *believe* as a result of hearing your story?



Recovering Memory: Reflective Story Weaving

Biblical-Theological Reflection

Step 1: Select a significant story from the life of the organization

If it is a recent story, invite the participants to retell their personal experience of the story using the connecting words, “and then...” or “but before that...” or “meanwhile”.

If it is a story that participants don't have direct personal experience with, invite them to tell the story the way it is told to newcomers in the congregation.

Step 2: Unpack the Story by identifying the people involved along with their roles and feelings. Also identify other people or groups affected by the event.

Step 3: Capture the essence of the story by selecting an agreed-upon symbol for the story.

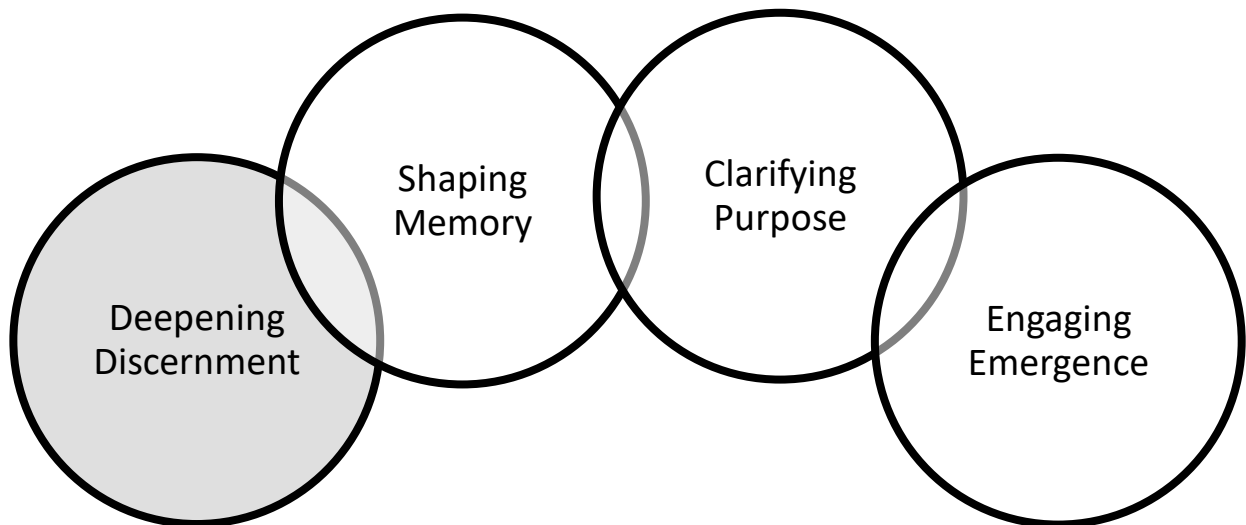
Step 4: Connect the story with scripture- a story, person, theme, verse, or image from scripture that comes to mind. This could be called the master story. Read the story aloud and fix it firmly in the group's collective mind.

Step 5: Weave the stories together. When the biblical story is laid alongside our individual or collective narratives one of four outcomes can be expected.

1. The biblical story will bless or affirm our story.
2. It will contradict or confront our story, standing over against it and judging it.
3. It will lure, tease, or entice the story to move toward change.
4. It will transform the story into something new.

Step 6: Isolate and identify meanings and beliefs in light of this experience of story weaving. What is really important to you? What can you now affirm? What now is your primary purpose?

Deepening Discernment



God's will: nothing more, nothing less, nothing else.

Decision making has its limits. We make decisions.

Discernment is given. The Spirit of God, which operates at the deepest levels of the human psyche and within the mysteries of the faith community, brings to the surface gifts of wisdom and guidance which we can only discover and name.

-Danny Morris and Chuck Olsen

Discernment is Not:

Consensus Based Decision Making (although consensus-based decision making is typically used within a discernment process).

A political process

A rational, logical, ordered discipline (Robert's Rules of Order)

Decision Making

Discernment Is:

Prayer based

Seeing, knowing, and acknowledging what is

Noticing the movement of the divine

A journey; not a destination

An attitude, and an act. (The fruit of discernment is not exclusively the decision we made, but also what's happening in us as a whole person.)

Discernment Requires:

Being selective about the number of issues considered

Beginning with corporate and private self-surrender

Clarity about core, scripture-based values and beliefs

Time spent in individual and corporate prayer and deep silence

Seeking consensus before moving forward

Trusting God's power and willingness to act in our situation

Recognizing that some are more gifted than others in "distinguishing among spirits"

<p style="text-align: center;">A Deciding Mindset</p>	<p style="text-align: center;">A Discerning Mindset (Morris & Olsen)</p>
<p>Assumptions:</p> <ul style="list-style-type: none"> • Most problems are solvable if approached carefully and logically • We have the capacity to understand and solve our own problems & embrace our own opportunities • Maximizing the use of available resources is important • Maintaining and restoring order is important 	<p>Assumptions:</p> <ul style="list-style-type: none"> • God is not neutral about our mission or our choices • God is self-disclosing • The Holy Spirit is our indwelling and ongoing guide • Openness of spirit and attitude is required • God’s will is best discerned within community • The practice of discernment is ongoing
<p>Process:</p> <ul style="list-style-type: none"> • Defining the problem • Looking for root causes • Gathering the data • Interpreting the data • Brainstorming alternatives/options • Establishing decision criteria • Evaluating alternatives • Assessing risk and return • Selecting an optimal solution 	<p>Process:</p> <ul style="list-style-type: none"> • Framing the focus of discernment • Grounding in guiding principles • Shedding ego & biases • Rooting in the tradition • Listening for the promptings of spirit • Exploring through imagination • Weighing options • Closing; moving toward selection • Testing the decision with rest
<p>Tools:</p> <ul style="list-style-type: none"> • Parliamentary procedures • Majority rule • Fishbone diagrams/root cause analysis • Decision Trees • Decision models • Probability Scenarios • Simulations • Strategy Maps • Radar charts 	<p>Tools:</p> <ul style="list-style-type: none"> • Consensus • Prayer • Silence • Scripture • Listening circles • Appreciative Inquiry • Story Telling • Testimony • Clearness Committees • Consolation/Desolation
<p>Who Does the Work?</p> <ul style="list-style-type: none"> • Authorized leaders 	<p>Who Does the Work?</p> <ul style="list-style-type: none"> • All invested parties

The Movements of Discernment

Framing identifies the focus and topic of discernment. The question or issue is clarified. The group decides what to lay down and what to pick up within the scope of discernment.

Grounding names the guiding principle(s) that will serve as the boundary for discernment. The guiding principle should be specific to the issue and should define both the boundaries of what will be discussed and the aim of the discernment effort. Oftentimes, the guiding principle needs to be tested and refined as the discernment process unfolds.

Shedding means naming and laying aside anything that will deter the group from focusing on God's will as the ultimate value. What needs to die in us in order for God's gifts and direction to find room in our lives? Shedding invites indifference to outcomes.

Rooting involves tying the discernment issue back to the biblical texts & our core values.

Listening invites the influential and the non-influential to speak to what they discern is God's will, without risk of rejection by the other decision makers. We listen to one another, to those on the margins of the organization, and to the Spirit of God. Listening includes the use of silence, prayer, data gathering and dialogue.

Exploring articulates and considers the various paths and options available to us.

Improving asks the group to improve upon each option that is under consideration.

Weighing calls upon wisdom, to indwell the process and inform our decision making. We consider each of the options employing rigorous mental examination, biblical imagination, church tradition, silence, guided imagery, looking for fruits of the Spirit, etc..

Closing moves from dialogue to discussion-to conclusion, or closing down on a decision or new direction. There is a test for consensus.

Resting invites participants to rest the decision near their hearts as they look for evidence of consolation/desolation.

Source: Danny Morris & Charles Olsen, "Discerning God's Will Together: A Spiritual Practice for the Church". Alban, 1997.

Who Discerns on Behalf of the Soul?

Three Alternate Viewpoints

Hierarchical Authority: The pastoral leader has the vision and full authority to get the congregation to engage the vision. The strength of this approach is that the work to be done is clear and there is less confusion among followers. (Biblical example: Moses)

- The problems with hierarchical authority:
 - Our culture has come to value participative decision making. People won't automatically yield to authority in the way that previous generations may have. We are distrustful of it.
 - To accomplish most of our goals and objectives, we need to cooperation of people who do not fall within a "chain of command"
 - Congregations are covenant communities and seek leadership from servant leaders. Congregations don't value hierarchies of command and control.
 - Pastors no longer hold the same level of authority within our culture that they once did.

Fully participative decision making: In this approach every participant has a voice in the development of the vision. All voices count and the pastoral leader's vision is no more or less valid than the vision of congregational leaders. (Biblical example: The Jerusalem Council).

- The advantage of this approach: If people share a common set of goals, a common perspective on what to do and how to accomplish it, and a common vocabulary that allows them to coordinate their behavior, then command and hierarchical authority are much less important. People will be able to work cooperatively without waiting for orders from someone.
- The problems with developing a strongly shared vision and culture:
 - It takes time and effort. If you are in a crisis or time limiting situation you may need to act more decisively that the vision and culture will allow.
 - In a strong culture, new ideas that are inconsistent with that culture have difficulty emerging. You need to find ways to introduce change, paradigm shifts and new ideas that the culture will not easily embrace.

Adapted from: Jeffrey Pfeffer, *Managing with Power: Politics and Influence in Organizations*. Boston: Harvard Business School Press, 1992

Who Discerns on Behalf of the Soul? (Cont.)

- **Visionary leader + engaged congregation:** This approach acknowledges that the pastoral leader has a strong vision to share, but not necessarily the full authority to execute that vision. The pastoral leader needs congregational buy-in and approval to get the vision fully articulated and implemented. (Biblical example: Nehemiah)
 - This leadership style provides people with a basic vision to engage, but fully invites their participation in formulating and executing an approach. The challenges of this approach include:
 - Articulating the overriding vision in a clear and compelling way that elicits buy in
 - Building consensus about the critical few strategic priorities that will move the congregation forward.

Adapted from: Jeffrey Pfeffer, *Managing with Power: Politics and Influence in Organizations*. Boston: Harvard Business School Press, 1992.

Locating Discernment

Three Biblical Metaphors for Discernment: (Acts 2:46-47, Matthew 6:6)

- Sanctuary –in the large **assembly**
- House – in **small groups**; study group, bible study, ministry group, committee, board, staff team
- Closet-in the hearts of **individuals**

Each of these three settings offers a unique way of practicing discernment. These three settings interact with one another to create the rhythm or dynamic of discerning with the soul of the institution.

Mapping a Discernment Process

Place a dot at the level where each movement will take place. Then connect the dots with a solid line to denote formal contact, and dotted lines to denote informal attention. Anticipated dates and times may be inserted to keep the process on track.

Movement/Setting	Assembly	Group	Individual
Frame Ground Shed Root Listen Explore Improve Weigh Close Rest			

Source: Danny Morris & Charles Olsen, “Discerning God’s Will Together: A Spiritual Practice for the Church”. Alban, 1997.

Structures that Support Discernment

These five components determine how control is exercised within a group of people acting on behalf of the whole:

1. *Invitation: Who is invited to the table to contribute to the conversation?*
2. *Space: How is it arranged and what materials are used?*
3. *Participation: How much time are people given to participate, and in what format is participation elicited?*
4. *Configuration: What freedom does the group have to change the composition of the group or its work process?*
5. *Sequence: What sequence of steps and time is allocated to our process?^{pi}*

Structures that cultivate wisdom embody identifiable attributes.

Openness: There is a sense of transparency surrounding the invitation list. The room in which we gather feels open, with ample room for people to have full access to one another. When possible, the space is open to nature, through an open door or generous windows that admits both light and air. The design of the meeting feels open, with adequate time for participants to engage their work.

Inclusivity- We err on the side of inclusion when assembling the invitation list. We make certain that the space allows equal access and involvement for all participants. We ensure that all voices are being heard within the meeting.

Diversity- We intentionally pursue diversity in our invitation list, in the people who contribute to the design of our agenda, in the types of interactions we design, in the forms of response we elicit, in our attention to dialogue time vs. quiet/reflection time.

Spaciousness- We are careful not to overschedule ourselves, so that we have adequate time to complete our work, we gather in a space that allows easy movement for people of all abilities, we create space in our agendas to shift direction and alter our plans.

Solitude- We balance the need for individual reflection with group work; we design activities that honor both introversion and extraversion. We create moments for silent internal reflection and prayer. We honor the need of individuals to examine their internal perspectives and to be truthful about their internal biases.

Welcoming all that is arising: We welcome both the pleasant and unpleasant aspects of group life, recognizing that even disruptive obstacles or difficult circumstances can be critical components of wisdom arising. We honor and work through conflict. We respect human agency, the powers of nature, and the significance of a spiritual dimension to the activities that we undertake.

Evaluate Robert's Rules of Order against these attributes

Source: Henri Lipmanowicz & Keith McCandless, "The Surprising Power of Liberating Structures: Simple Rules to Unleash a Culture of Innovation". Liberating Structures Press, 2013.

Cultivating Wisdom through Consensus

Consensus has been achieved when every person involved in the decision can say: “I believe this is the best decision we can arrive at for the organization at this time, and I will support its implementation.”

- Simply agreeing with a decision is not true consensus. Consensus implies commitment to the decision, which means that you oblige yourself to do your part in putting the decision into action.
- Consensus is not the same thing as a unanimous decision (in which all group members’ personal preferences are satisfied). Consensus is also not a majority vote (in which some larger segment of the group gets to make the decision).
- Consensus is not a coercive or manipulative tactic to get members to conform to some preordained decision. The goal of consensus is not to *appear* participative. It is to *be* participative.

Working by consensus requires these conditions:

- Skilled facilitation; in depth knowledge of consensus processes and tools; more committed to a good process than a specific outcome;
- A group that understands consensus based decision making
- Clarity about the definition of the issue, the scope of the task, the authority of the group
- Clearly established decision criteria
- A good process for dialogue (one that keeps the group focused on relevant criteria, invites clarifying questions, explores legitimate reservations, tests for consensus, and recognizes when agreement has been reached.)

Testing for Consensus:

You are NOT asking:

- Is this your first choice of options?
- Do you like this option?
- Does this option satisfy your personal needs?

You ARE asking:

- Is this an option that I can live with and ultimately support?
- Does this option satisfy the criteria that we have claimed as a group?
- Will this option adequately serve the best interest of our congregation and its stakeholders?

Adapted from: Larry Dressler, “Consensus through Conversation: How to Achieve High-Commitment Decisions”. San Francisco: Barrett Kohler, 2006.

Cultivating Wisdom through Consensus (cont.)

Working with disagreement:

In consensus, each group member has the right and responsibility to express concerns he or she has about any option. Legitimate concerns often take the form of questions and statements about aspects of the option that might not serve the congregation's best interests. As concerns are raised, it is the group's job to understand and attempt to resolve them.

- Expressing and resolving legitimate concerns:
 - Listen fully to the reservation that has been raised. Ask questions to better understand the reservation.
 - Provide additional information to the person raising the concern.
 - Pause for silence and prayer
 - If appropriate, agree to pursue the concern further with the candidate in order to get resolution of the issue.
 - Offer to make the concern a point of record. Ask the concerned member if they are able to “stand aside” and move ahead with the candidate, now that the concern has been heard and vetted.
 - Take the candidate out of consideration.

- Non-legitimate or obstructive opposition: (the person is acting on the basis of personal values, beliefs or needs; or is blocking the candidate for some reason that they can't or won't articulate)
 - Bring the conversation back to the agreed upon criteria and ask the member to speak only about criteria that have been agreed to
 - Help the group member distinguish between their own personal preference and the needs and preferences of the congregation (distinguish “must” from “want”)

What happens if we can't reach consensus?

- Defer the decision: Go back to the drawing board. Consider a new pool of options.
- Dissolve the group: Acknowledge that this group is probably not able to reach consensus.
- Give decision making authority to a sub-group: You may decide in advance that if the group is unable to decide that you will delegate the decision to a smaller subset of the larger search committee.
- Seek mediation: If some members are holding out for legitimate reasons, it is sometimes useful to employ a trained mediator to work specifically with those group members who hold differences. Mediation is a structured process through which individuals are encouraged to air their views and work toward resolution of differences.

Adapted from: Larry Dressler, “Consensus through Conversation: How to Achieve High-Commitment Decisions”. San Francisco: Barrett Kohler, 2006.

“I Wonder”: A Group Discernment Approach

This exercise can be used with groups that have come together for problem solving or decision-making purposes. It is designed to help a group shift its field of awareness and enter a state of wonder about the issue at hand.

1. Begin by creating a problem or decision statement about the issue to be addressed.

Example: We must decide what to do about a \$10,000 pledging shortfall in our operating budget for this year.

Example: Will we authorize the creation of a new position, called “Communications Director?”

Example: Shall we eliminate our 8:30 AM worship service on Sunday mornings?

Be very mindful of the decision or problem statement that you create. The statement itself will define your field of attention.

2. Appoint a timekeeper to keep the group on track for the next steps.
3. Once the problem has been defined, give each member of the group two minutes to reflect on what they know for sure about this topic. Invite them to lift up deeply held assumptions or strong beliefs about the issue. Encourage them to stay away from solving the problem or recommending solutions. We are only describing assumptions and beliefs at this point in time.
4. Invite the group into silence for 3 minutes, asking them to visualize and release each assumption or belief that was mentioned by the group. (Group members might want to imagine each assumption or belief being written on a chalkboard that simply dissolves or erases itself in the mind’s eye.)
5. Invite each group member to speak again for 60 seconds, this time on what they “wonder” about this topic. Encourage them to maintain an unknowing mindset as they talk about various aspects of the issue at hand that they would like to know more about or consider from a new perspective. Again, encourage the group to stay out of problem-solving mode. Reframe statements that seek to make a recommendation or advance a specific solution.
6. Invite group conversation about how their field of awareness, or their way of knowing about the issue is beginning to shift.

Group Discernment Using Scripture

Biblical Theological Reflection

The authentic values and purpose of an organization come from somewhere. The values and purpose of the community must be rooted in and tested against the best of its long-standing traditions. These include scripture, creeds, hymns, art, and historical experience, all of which point to wisdom.

It is important that we create theology within the culture in which the community of faith lives, rather than borrowing it from another culture or institution. We are creators of our own local theologies.

Step 1: Identify a significant issue for consideration.

Step 2: Look at the many sides of the issue and how it “comes close” to the lives of participants in the dialogue.

Step 3: Select a scripture passage that may or may not be related to the issue.

Step 4: Ask yourselves three questions. (Taken from Walter Wink’s book, “The Bible in Human Transformation”)

What does the text say? (Just get the story out as it is)

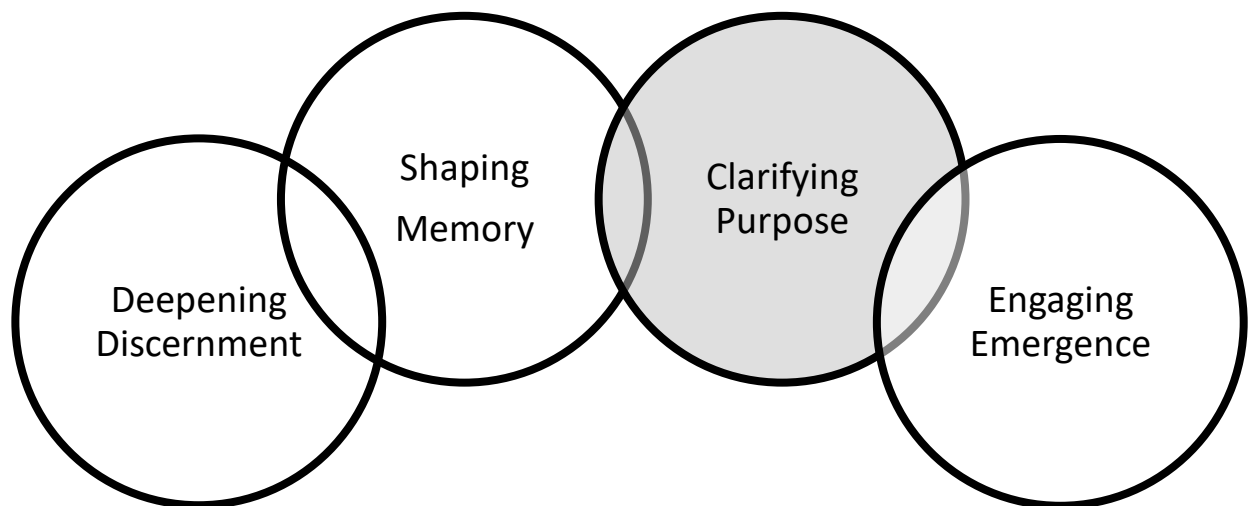
What does the story mean? (Look at its context and relation to other biblical material)

What would it be in me/us? (Picture it in your setting)

Step 5: Returning to the issue under consideration, can you identify any new “twists” or insights?

Source: Charles M. Olsen, “Transforming Church Boards into Communities of Spiritual Leaders.” Alban Books, 1995. Pages 73-74.

Clarifying Purpose



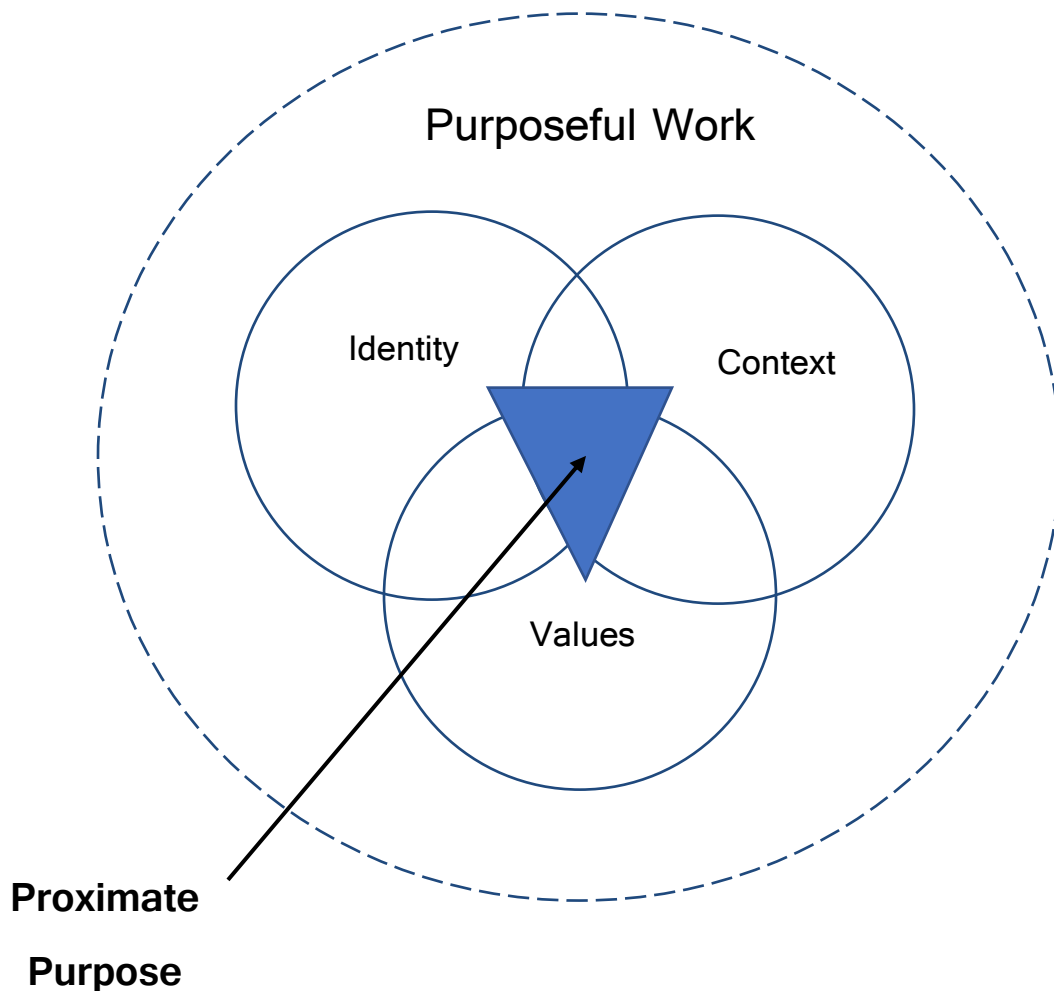
“Humans have a responsibility to find themselves where they are, in their own proper time and place, in the history to which they belong and to which they must inevitably contribute.”

–Thomas Merton

Clarifying Your Proximate Purpose

Purposeful Work: All the ministry options that fall under the broad umbrella of our mission

Proximate Purpose: What we are called to do or become now. The next necessary difference we seek to make.



Shifting Identity and Context

Who Are We? (Exploring the ways our identity is changing)

When was the most recent glory era of your congregation? How would you describe the identity of your congregation during that era?

What part of that identity is gone now?

What part of the congregation's identity is no longer relevant-even though the church still clings to it?

What pieces of identity seem to be expressing themselves anew?

What passions and skills are emerging in the congregation now?

Who Do We Serve? (Exploring how our context is shifting)

What is important about this historical moment and the particularity of this place?

How would you describe the demographics of the people who show up to participate in the life and ministry of the congregation?

How is that demographic similar/different from, the neighborhood surrounding the church building?

How would your congregation answer the question, "Who is our neighbor?"

How has the shift towards virtual church changed your congregation's understanding of the community it serves?

How has the shift towards virtual church changed your congregation's understanding of the concept of membership?

Identify Your Core Values

Core Values: What do we Stand For?

The Essential and enduring tenets that guide the organization's internal conduct as well as its relationship with the external world.

What Core Values Do:

- Clarify who we are when we are at our best
- Articulate what we stand for
- Explain why we act the way we do
- Guide what we teach
- Inform who, how and what we recruit & reward
- Guide us in decision making

Core values are not descriptions of the work we do. They are not the strategies we employ to accomplish our mission. They are not things we do, they are principles we hold.

Core values help to explain why we do what we do. Core *values* undergird our work. They help us to distinguish right from wrong for this organization. They focus our choices; how we interact with one other, how we establish priorities, and which strategies we employ.

(Examples might include: excellence in worship, beauty in the arts, caring for one another, the value of every voice, speaking truth to power, the importance of childhood in faith formation, promoting social justice etc.)

Who are we when we are at our best?

Our core values should describe who we are when we are operating as our best selves. They should incorporate an element of aspiration, but they should also be grounded in our reality. Our core values are not a wish list of who we would like to be in the future, they are a real description of our best attributes.

Sample Core Values (Four Congregations)

Church A:

- Christ-Centered*** The church, its staff, and its members are committed to lifelong discipleship, seeking spiritual discernment in making decisions and in living our lives.
- Social Gospel*** XXX was established on a doctrine of social ministry, and its work today reflects a continuing commitment to community service, overseas ministry, and social witness.
- Spiritual Development*** Driven by a yearning for spiritual growth and a deeper understanding of our faith, tradition and calling, XXX is committed to a stimulating program of religious education and spiritual development, most particularly the spiritual development and religious education of its children.
- Tradition*** XXX draws from the past in planning for its future, holding close the traditions of its worship, commitment to the arts, and history of the church.
- Quality*** XXX is committed to quality reflected in the excellence of its building, its arts, its education, and its ministries.
- Theological Diversity*** XXX respects the importance of openly sharing our differences in matters of spirituality and faith in a spirit of love.
- Art That Glorifies God*** XXX members have an appreciation of beauty in worship, finding music and space a powerful medium for spiritual expression and evangelism.

Church B:

Every Person Matters: Each person is created in the image of God, entrusted with creative and spiritual gifts. We are each called upon to make a unique and humble contribution.

Taking the Next Step: Becoming disciples of Jesus Christ requires faithfulness to Scripture and the leading of the Holy Spirit. The journey has to begin somewhere; it is an ongoing pilgrimage that starts where we are.

Authentic Community: We seek to be a people that God might dwell among; open, honest, accepting, welcoming and non-judgmental. We recognize that we are better together than apart.

All of Life is Worship: God is good. In response to God's faithfulness we are compelled to respond with worship, reverence and praise. Opportunities for worship exist in all areas of our lives; in work, play, study, prayer, giving and service.

Love in Action: God loves people and so we love people. We show God's love to the world through action born of compassion. Avoiding judgment, we seek to embody the love of Jesus Christ through tangible acts of kindness, care and service to others.

Sending Out: We send empowered and equipped disciples of Jesus Christ into the world. Every member is a missionary in the community where they live, work, serve and play.

Church C:

We are grateful for the divine gifts that allow us to be:

God-Centered: Our love of God and God's love for us is at the center of all we do. We seek to glorify God through our worship, programs and outreach.

Welcoming and Inclusive: Our doors, minds and hearts are open to all who would join us on this journey of faith. We value variety in experience, independence of thought, and diversity in our expression of faith.

Servant Leaders: We freely offer our time and our talent. We seek first to serve, extending ourselves to meet the needs of our faith family, our community and the larger world.

Striving for Excellence: We are ambitious for the Gospel and cannot settle for less than the best that God has entrusted to us. We bear witness to the presence and power of God through worship, fellowship and programs that inspire, uplift, enlighten and transform.

Generous: Compelled by the example of Jesus Christ, we share what we have and who we are with others, particularly with the poor and downtrodden, and with those operating on the margins of life.

Transforming through Education: We value theological integrity and the power of Christian Education to transform lives. We nurture people of every age and at every stage of their faith journey.

Church D:

We are intentional in our efforts to be...

BIBLICAL – We believe the Bible is true and that its teaching is the catalyst for life-change in an individual’s life and in the church. (2 Timothy 3:16-17; James 1:22-25; Hebrews 4:12; Acts 20:32)

EVANGELISTIC – We believe unchurched people matter to God, and therefore ought to matter to the church. (Luke 5:30-32; Luke 15; Matthew 18:14)

RELEVANT – We believe the church should be culturally relevant while remaining doctrinally sound. (1 Corinthians 9:19-23)

TRANSFORMATIONAL – We believe followers of Jesus should live authentic Christian lives and strive for continuous spiritual growth. (Ephesians 4:25-26 & 32; Philippians 1:6; Hebrews 12:1)

PURPOSEFUL – We believe the church is a unified community of servants, each one exercising their unique spiritual gifts, and structured according to the nature and mission of the church. (Romans 12; Ephesians 4; 1 Corinthians 12 & 14; 1 Peter 4:10; 1 Peter 5; Acts 6:2-5)

LOVING – We believe loving relationships should permeate every aspect of church life. (1 Corinthians 13)

RELATIONAL – We believe life-change happens best through relationships. (Acts 2:44-47)

EXCELLENT – We believe excellence honors God and inspires people. (Philippians 3:12-16; Colossians 3:17; Proverbs 27:17)

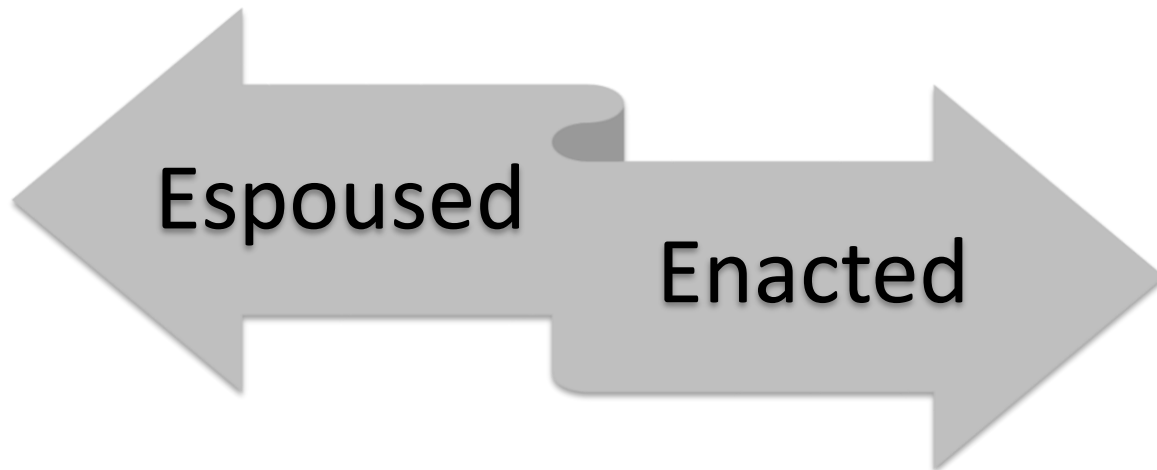
SPIRITUAL – We believe the pursuit of full devotion to Christ and His cause is expected of every believer. (Philippians 2:1-11)

FREE – We believe in religious liberty for all people, the separation of church and state, and the autonomy of the local church. (Galatians 5:1; Matthew 22:21)

Espoused Vs. Enacted Values

Espoused Values: Represents the explicitly stated values and norms preferred by the organization. These are the values that we want others to believe that we abide by.

Enacted Values: Represents the values and norms that are actually exhibited by the constituents of the organization.



Testing Our Shared Values- An Exercise (cont.)

4. Now answer these questions:
 - a. In times of stress, this congregation seems to naturally do certain things...and these natural reactions suggest certain values.

 - b. This is what we always do:

 - c. These are the real values such habits reveal:

Now compare these real values to the values that you identified at the beginning of the exercise. What similarities and differences became apparent? What does this suggest? How will the values that surface in the church during times of stress either help or hinder the mission of the church?

Quick Scanning for Our Real Value System

A small group exercise: Have each small group brainstorm examples of programs, events, policies, campaigns, or media events that occurred in the past year, looking for examples that fall into any of the following categories:

- Risk Taking
- Initiating
- Adapting
- Adjusting
- Maintaining

Table groups are then asked, “What values and beliefs have been expressed in those events?” This provides a quick picture from which basic value postures can be identified. These values can be recorded in flip chart paper.

In what ways do the values demonstrated by these activities support or contradict our stated values?

Source: Lawrence L. Lippitt, “Preferred Futuring: Envision the Future You Want and Unleash the Energy to Get There”. San Francisco: Berrett-Kohler Publishers. 1998.

Values Based Decision Making

Step 1: Determine who this problem or decision applies to or impacts.

Determine who needs to be involved in the decision making or problem solving process. What perspectives might we be missing in this room?

Step 2: Frame the Issue or Problem. What is this issue about? What is it not about? What does our framing highlight? What does it leave out?

Step 3: Name and clarify those core values and grounding principles that are relevant to this decision. Which values are most important, which are of lesser importance? What stakeholder values may conflict with the congregation's core values on this issue?

Step 4: Shed Bias. Invite decision makers to acknowledge and release any preconceived notions, biases or ego-driven responses they may have to possible outcomes and options. Test assumptions. What do we assume is true about this decision? Are our assumptions accurate?

Step 5: Weigh the various decision options and choices according to how they satisfy the relevant core values.

Step 6: Pray about the options and the decision at hand.

Step 7: Choose the option that fits best.

Step 8: Let the decision rest. Test for consensus with core values. Test for consensus among the decision makers. What negative consequences are likely or possible because of this decision? What do I regret about this decision? Are there important values that we have failed to consider?

Step 9: Report the decision to appropriate parties, using the core values as part of your communication strategy.

Naming our Strategic Priorities

Finding Clarity about What is Most Important- Now

The **strategic priorities** of the organization are the vital, few statements of direction that leadership will use to focus the energy and resources of the organization over the next one to three-year period. These statements are broad in focus and describe significant performance gaps that will be closed, or major new initiatives that will be launched during the next chapter of organizational life. They are not overly prescriptive, allowing for the organization to learn and adapt as they pursue each initiative.

Few volunteer organizations have the capacity to focus on more than two-three major impact areas at a time. For this reason, it is important to carefully limit the number of priorities that you claim.

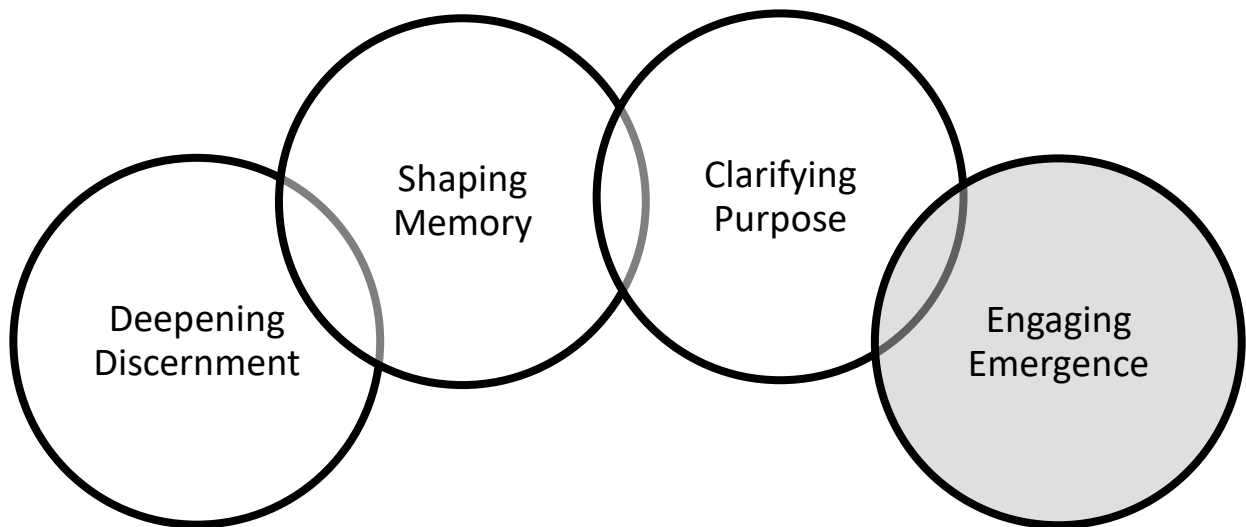
The strategic priorities should specify future conditions that organizational leaders hope to achieve or resolve. To that end, the strategies must be observable and measurable in some broad way.

Examples of Congregational Strategic Priorities:

- First Church will offer a range of worship venues that serve the full diversity of our congregation. To that end, new worship venues will be introduced and existing worship venues will be reconfigured to satisfy the felt needs of our membership.
- The financial health of the congregation will be sustained through a comprehensive and well-coordinated stewardship program. The entire budgetary/spending cycle will be grounded in a biblically based understanding of giftedness and stewardship.
- The assimilation process at All Souls will be managed as a singular integrated process: one that encompasses a visitor's first experience to the Church; includes their full incorporation into membership; and ultimately equips and engages them in leadership.

Getting clear about our current priorities allows volunteers and staff to say “no” to lesser important things-in service to that which is most important for this season.

Engaging Emergence



Emergence: What is it?

The simplest definition of emergence is this: **order arising out of chaos**. We find references to emergence in the physical sciences, social sciences, philosophy, systems theory, and art.

Emergence is a naturally occurring pattern of change that occurs whenever a group interacts in conditions of upheaval, disturbance, or dissonance. A **moment arises when disorder gives way to order**. Something new emerges, a higher order pattern, a decision, a structure, or a change of direction. Groups of people, when left to their own devices, will produce spontaneous order over meaningless chaos. A group will discover a new set of effective behaviors to perform complex tasks.

During liminality, the natural restraints on innovation are at their weakest. Disturbance and disruption are high. In the gap between the old-world order and the emergence of a new world order we are freest to discover new directions. Innovation will occur if we allow and support the natural unfolding of emergence.

Stages of Emergence

1. Something disharmonious occurs, but the organization tries to ignore or deny the **disturbance**.
2. The **disruption** becomes bothersome to the point where it can no longer be ignored. We discover how our status quo response leads to conflict or failure.
3. We design or discover new practices to resolve the disruption, considering our most important values. This is **innovation**.
4. We renew **coherence**, discovering how to integrate what is novel into what is known.
5. We commit to the **adoption** of new practices.

Adapted from: Peggy Holman, *Engaging Emergence: Turning Upheaval into Opportunity*. San Francisco: Berrett-Koehler Publishers. 2010.

What You Can Do to Support Emergence

1. Disturbance of the status quo

- Behave differently than people expect: Break habits
- Avoid the compulsion to calm things down and make people feel better
- Get curious: Inquire appreciatively: Ask bold questions of possibility
- Embrace mystery
- Clarify where the present trends will lead
- Admit that you don't know the way forward
- Acknowledge their anxiety but refuse to fix emerging problems with technical quick fixes

2. Disruption of practice

- Keep conflict healthy, but don't eliminate it
- Destabilize structures
- Surface competing commitments and values
- Reveal the clear and present danger associated with maintaining the status quo
- Acknowledge who stands to lose what
- Name what is ending; Articulate what remains
- Manage the level of heat and dissonance in the system

3. Innovation

- Imagine how the recovery of a forgotten practice might lead to something new
- Bring something from the margin into the mainstream
- Import a new practice from someplace else
- Distinguish between repetition and iteration
- Normalize failure (fail early and learn quickly)
- Create low risk experiments that allow everyone to learn

What You Can Do to Support Emergence? (cont.)

4. Coherence

- Create a plan-do-check-act cycle
- Clarify what wants to emerge here and now
- Encourage people to take responsibility for what they love
- Make meaning out of what is happening (shape new stories/narratives)
- Analyze factions that emerge
- Build meaningful coalitions
- Avoid premature solutions/certainty

5. Adoption

- Clarify the value of new practices: show how they more than offset the cost of the change
- Ask people to make small commitments that lead to later larger commitments (consider-try-sustain)
- Compensate people for their losses
- Show how perceived losses help to sustain what is most important
- Honor dissenting opinions, but do not let them stop forward momentum
- Create new structures and processes
- Discover new metrics to evaluate effectiveness

Disrupting the Status Quo and Staying Alive

What is the action you are considering?

I. Supporters

Who might be your supporters?	Why might they be allies?	What's their main objective? (Support you, the initiative, the organization?)	How can this supporter best help you successfully implement your intervention?

II. Resistors

Who are the likely resistors of this initiative?	What ideas are they bringing forth that might be valuable for you to hear?	How might you enable their ideas to have a hearing?	How can you protect them from being marginalized or silenced?

III. Authority Figures

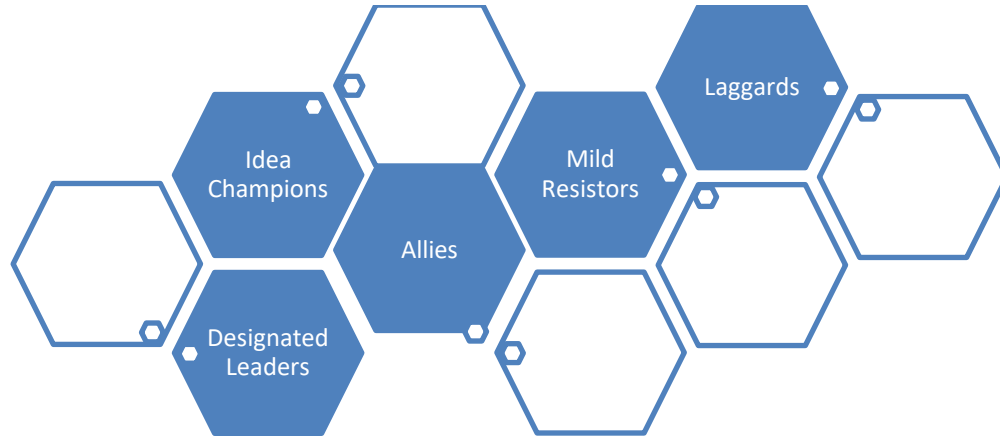
Who are the authority figures most important to your intervention's success?	Why are they important?	What signals are they sending about your intervention?	What might you say or do to secure their support?

IV. Those with Hurts and Losses

Who will be hurt or suffer loss from this intervention?	What will they lose?	What new skills would help them adapt?	How might you help them learn these new skills?	Which ones will probably need to leave the congregation?	How could you help make that transition easier for them?

Source: Ronald Heifitz, Alexander Grashow, & Marty Linksy, "The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World." 2009. Boston: Harvard Business Press

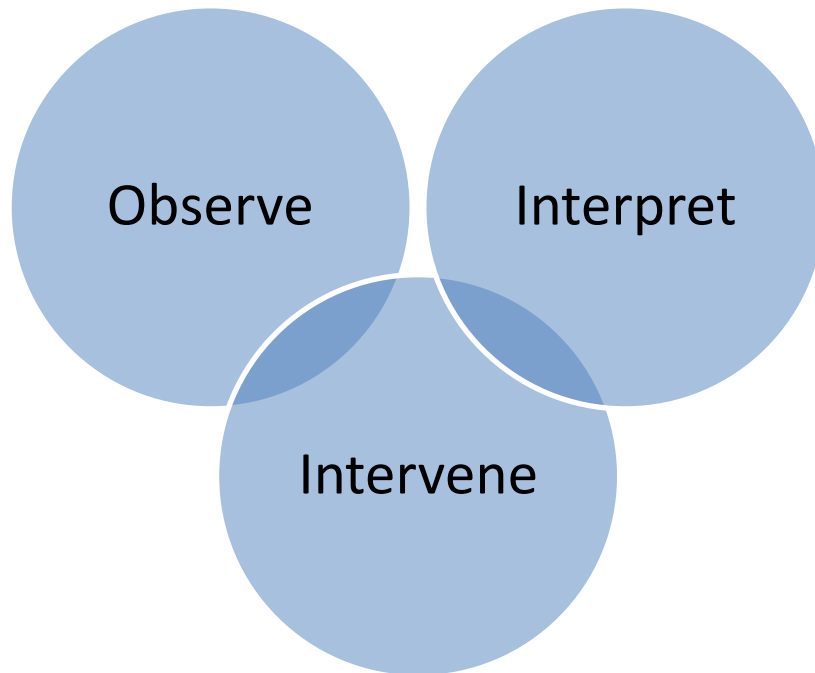
Analyzing Factions



1. Look at who is in various subgroups and what their interests are:
 - a. Who are the competing factions and what are their stakes?
 - b. How closed or permeable are the boundaries between groups?
 - c. Who or what supports the subgroup?
 - d. Is the group committed to engagement or to being bystanders?
2. Examine Values, Differences and Conflict
 - a. What are the values of each group and what do these values lead the group to hold onto?
 - b. What values or norms might be challenged here?
 - c. Who has the most to gain or lose? Around what?
 - d. Where are the allies for action? (Across boundaries)
 - e. What will they not compromise on? Why?
3. Evaluate Capacity to Learn and Adapt
 - a. Do they test their own values and assumptions?
 - b. What prior change experience have they had?
 - c. What risks will they accept?
 - d. Is it possible to challenge the senior representative of the group? With what consequences?

Adapted from: Maxine Fern and Michael Johnstone, Vantage Point Consulting, "Intervention and Leadership: Tactical and Strategic Skills. Can They Be Learned?" March, 2005.

Holding Steady



Once you have made an intervention your idea belongs to the system.

- Resist the impulse to over-control. You cannot control what people do with your intervention.
- Watch for the ways in which the idea unfolds and how resistance or buy-in manifests.
 - What is the degree of inclusion, participation & contribution?
 - How are authority, power and control being used to regulate differences?
 - How are individual needs and ideas being recognized?
 - Is the group learning?
- Stay present, keep listening, use silence.
- Pay attention to work avoidance and keep giving the work back to the people who need to do it.
- Watch the behavior of leaders and how pressure is being applied to them to restore equilibrium.

Adapted from: Maxine Fern and Michael Johnstone, Vantage Point Consulting, “Intervention and Leadership: Tactical and Strategic Skills. Can They Be Learned?” March, 2005.
