

ORGANIZATIONAL STEWARDSHIP & PRACTICE

How Congregations Learn:



Knowledge ACQUISITION

Knowledge SHARING

Knowledge STORING

Knowledge RETRIEVING

Stages of the Learning Process – **Knowledge Stewardship**

Prepared by

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This **WORKSHOP WORKBOOK AND RESOURCE MANUAL** consists of two parts: 1) the theoretical side of organizational learning, reviewing the classical organizational theories and contributors; and 2) the practical side of organizational learning, providing methods and techniques suitable in the intentional interim ministry process and beneficial in the intentional interim pastor's tool box.

This **WORKSHOP WORKBOOK AND RESOURCE MANUAL** is prepared for Ashland Theological Seminary Pastoral Leadership Certification Program – Detroit Cohort, February 8, 2020.

King Solomon writes in Proverbs 1, "Let them add to their learning and let the disciples." (Proverbs 1:5, NIV).

Commented [A1]:

Forward – Rev. Dr. David Peter, Dean of Faculty, Concordia Seminary

Workshop 1 – Organizational Learning: The Theoretical Side

The script for this presentation is thorough and comprehensive and relates well to congregational realities. It is organized in a clear and logical manner, identifying the objectives and terms early on and grounding the topic theologically at the beginning. You reflect well upon the various learning theories and the most seminal contributions to the study of organizational learning. But then you bring it home with guidance to the IIP pastor for leading the congregation in purposeful learning as an organization (10 ways).

Workshop 2 – Organizational Learning: The Practical Side

This presentation is obviously more practical in nature, as is its purpose. Here you apply more concretely the abstract insights from the theoretical study to the congregational self-study and congregational development in the intentional interim process. It appears that this workshop employs attendee participation and interaction. I expect this to be very beneficial to the participants in your workshop, providing them with useful tools and practical “take-aways” for their own leadership of congregations in transition. It is clear that you will emphasize framing and teaming in this workshop, two topics which we covered in our video conferences.

The capstone product of these two workshop presentations demonstrates practical results.

Rev. Dr. David Peter, June 2019

Biography – Martin Schroeder-Lee

Martin feels especially equipped for transitional ministries, having transitioned in childhood from a bi-racial family, to seven foster homes (ward of the court), to being adopted by Lutheran schoolteachers. Martin went to Lutheran schools from kindergarten through college (Concordia University, Ann Arbor) received his M.Div. at Concordia Theological Seminary in Ft. Wayne, IN, and is currently a Doctor of Ministry student at Concordia Seminary, St. Louis, MO. He also attended Navy Chaplain Candidacy School in San Diego, CA, and Newport, RI. Martin has served in small, program, large, and corporate sized congregations; in positions varying from youth ministry to senior administrative pastor. Martin has served as an IIM practitioner with a Finance Specialty for 10 years in the Michigan, Eastern and Southeastern Districts of the LCMS. He serves on the IMC board and as a NALIP trainer. Martin is married to Anne Schroeder Lee and has five children: Kyle, Kelsey, Justin, Rachel and Katie.

EDUCATION

Concordia Seminary, St. Louis, MO D.MIN. in Missional Leadership Tentative completion date: May 2020 MAP: "Improving Knowledge Coordination Among LC—MS Church and School Leadership Teams During Times of Transition"	2017
Concordia Theological Seminary, Ft. Wayne, IN M.DIV. in Practical Theology Thesis: "Integrating Liturgy and Principals of Community Building"	1997
Concordia University, Ann Arbor, MI B.A. in Pre-Seminary Area of Concentration: Communications and Media Minor: Classical Languages	1992

COACHING-TEACHING EXPERIENCE

Intentional Ministry Conference (IMC) of the LC—MS NALIP Faculty Curriculum contributor, teaching, and coaching Lutheran pastors towards certification in NALIP Basic Education.	2017 – Present
Michigan District, Southeast District, and the Eastern District (LC—MS) Intentional Interim Ministry Consultant / Coach	2009 – Present

Consulting for professional development and training of professional church workers (pastors, principals, business managers, and LLPs) in governance, operations, and finance.

LPL Financial, LLC, Riverside, California and Lansing, Michigan

Principal / Financial Advisor

2002 – 2015

Curriculum development for training in modern portfolio theory, stock analysis, charting, and portfolio management. Exercised Office of Supervisory Jurisdiction (OSJ) by providing oversight of branch office operations for financial advisors and Series 7 licensed stockbrokers.

UBS PaineWebber, INC., Riverside, California

Teaching Assistant to UBS PaineWebber Branch Manager

1999 – 2002

Collaborated on curriculum development and coaching in modern portfolio theory and client management practices.

RELATED EXPERIENCE

St. Matthew Lutheran Church and School, Westland, Michigan

Senior Administrative Pastor (Intentional Interim Ministry)

2016 – 2017

Trained staff in root cause analysis and cause mapping for diagnostic problem solving regarding early learning center summer hours and front office layout and flow.

St. Paul's Lutheran Church and School, Glenn Burnie, Maryland

Senior Administrative Pastor (Intentional Interim Ministry)

2014 – 2015

Guided in compiling data and analyzing the employee compensation plan. Oversaw designing a "Get Well Plan" for 80 employees.

St. Mark Lutheran Church and School, Kentwood, Michigan

Senior Administrative Pastor (Intentional Interim Ministry)

2012 – 2013

Provided oversight in staff reconfiguration and reduction in force. Installed safeguards and financial controls in school budget.

St. Mark Lutheran Church and School, Battle Creek, Michigan

Senior Administrative Pastor (Intentional Interim Ministry)

2010 – 2011

Assisted department heads in studying the employee benefits plan and moving to an improved benefits plan model, reducing costs and improving benefits. Assisted in implementing a shared expense allocation model between the church and the school.

TABLE OF CONTENTS

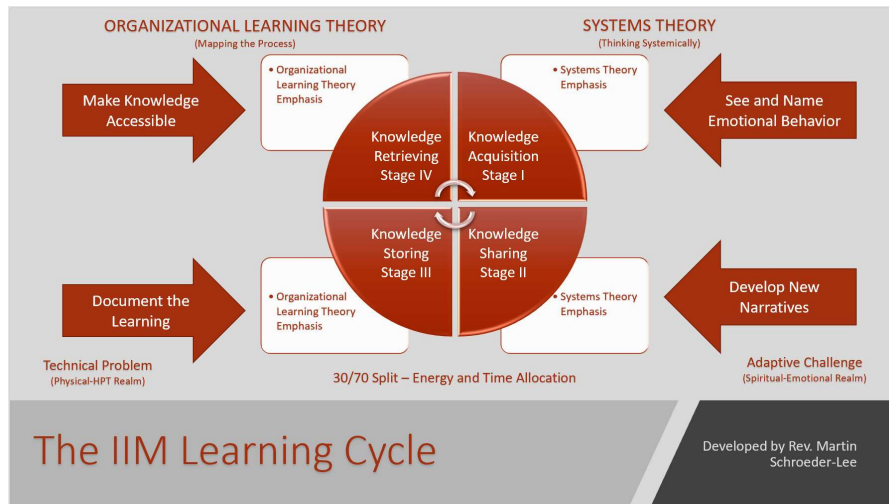
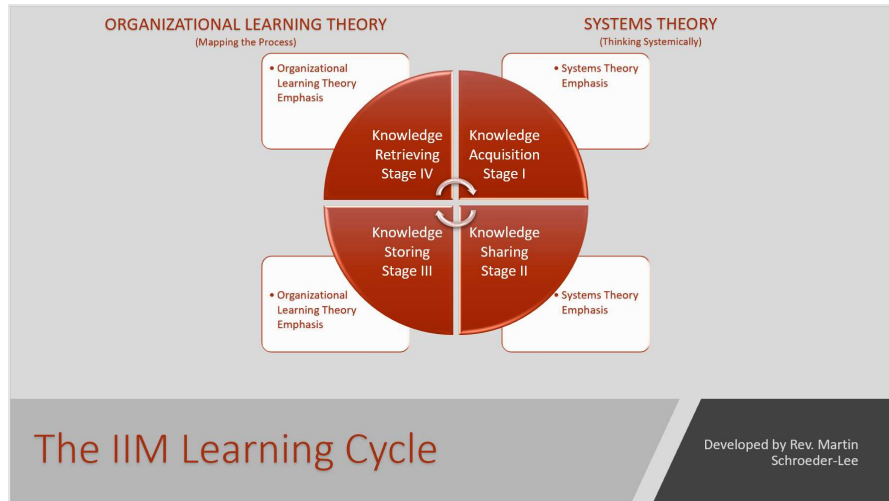
Forward – Rev. Dr. David Peter, Dean of Faculty, Concordia Seminary	1
Biography – Martin Schroeder-Lee	2
WORKSHOP QUESTIONS.....	6
THE IIM LEARNING CYCLE – TWO COMPLIMENTARY THEORIES	7
WORKSHOP I – ORGANIZATIONAL LEARNING THE THEORETICAL SIDE.....	8
Purpose	9
Objectives.....	10
Terms.....	10
THEOLOGICAL BASIS FOR ORGANIZATIONAL LEARNING.....	12
CLASSICAL ORGANIZATIONAL LEARNING THEORIES	14
Experiential Learning.....	15
Adaptive and Generative Learning	15
Assimilation Learning.....	17
CONTRIBUTORS.....	17
Peter M. Senge (1990)	17
Chris Argus and Donald A. Schon (1996).....	19
David R. Schwandt and Michael J. Marquardt (2000).....	20
Mark Easterby-Smith and Marjorie A. Lyles (2011)	21
Kathryn S. Roloff, Anita W. Woolley, and Amy C. Edmondson (2011)	22
10 WAYS FOR THE IIP TO FASHION A LEARNING ORGANIZATION.....	24
1 – Motivating (Foss and Mahnke).....	24
2 – Teaming (Edmonson, Foss and Mahnke).....	26
3 – Framing (Edmonson)	29
4 – Learning from Failure (Edmondson)	31
5 – Promoting Psychological Safety (Edmonson).....	33
6 – Accessing Tacit Knowledge (Demings and Tsoukas)	35
7 – Leveraging, Dialoguing, and Finding Alignment (Senge).....	36
8 – Forgetting: Intentional v. Unintentional (De Holan and Phillips)	39
9 – Developing Healthy Emotional Labor (Vince and Gabriel)	41
10 – Overcoming Learning Disabilities (Albrecht's Four Strategies).....	45
WORKSHOP II – ORGANIZATIONAL LEARNING THE PRACTICAL SIDE	47

ORGANIZATIONAL LEARNING AND JOINING.....	48
IIM Process Map	49
One-on-One Interview Questions	50
Emotional Thermostat	52
Congregational Size Theory	54
Congregational Life Cycle Theory	55
The Organizational Flow Chart	57
Chafin-Schutz Inventory.....	58
ORGANIZATIONAL LEARNING AND REPORTING.....	59
30-Day Report.....	61
Call Readiness Report	61
Monitoring Reports.....	61
IIP'S 1st Quarter Report.....	62
IIP's Senior Pastor Annual Report	65
ORGANIZATIONAL LEARNING AND TEAMING	66
Teaming with the SENIOR LEADERSHIP TEAM (SLT).....	67
Teaming with the TRANSITION TASK FORCE (TTF)	75
Teaming with the GOVERNANCE TEAMS – Mapping	82
Teaming with the MINISTRY TEAMS – Mapping	87
Teaming with the ELDERS – Mapping.....	88
Teaming with the VOLUNTEERS – Mapping.....	89
Heat Maps.....	89
Prayerful Safeguards – Mapping	90
BIBLIOGRAPHY	91
RESOURCES	92

WORKSHOP QUESTIONS

1. List three attributes of great teams?
2. What are the Biblical examples of great “ministry” teams? Please explain.
3. What role does **knowledge** and **learning** play in the success or failure of ministry teams?
4. Have you ever been a part of a great team? What made it so great?
5. How was the team able to **improve processes, problem-solve**, and/or **experiment** with new learning?
6. What is your role in how knowledge gets **created, shared, stored and accessed** in your ministry context?

THE IIM LEARNING CYCLE – TWO COMPLIMENTARY THEORIES



WORKSHOP I – ORGANIZATIONAL LEARNING THE THEORETICAL SIDE

How Congregations Learn:



Stages of the Learning Process - Knowledge Stewardship

Purpose

The Intentional Interim Ministry (IIM) process is that intentional effort to create a learning environment and in many cases _____. The Intentional Interim Pastor (IIP) and the congregation enter into a covenant agreement to achieve five IIM Developmental tasks: 1) Coming to terms with history; 2) Discovering a new identity; 3) New Leadership Emerges/Shifts of power; 4) Reconnecting with denominational linkages; and 5) Commitment to new leadership and a new future. The IIM process sets the conditions for the collective congregation to be engaged in _____ and to promote the sharing of knowledge which may be embedded in pockets of the congregation or in record books. The IIM process assists individuals in synthesizing their views and understanding of the events which have occurred in their history. As Argyris and Schon note about organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interactions.”¹

Whenever a major event occurs in the life of the church (the departure of a beloved pastor, or the death of a pastor, or church worker misconduct) there are simultaneous learning moments. The system is unfrozen, willing to unlearn and learn, seeking guidance and even being willing to innovate due to their desire to perpetuate their mission and accomplish their goals.

¹ Ibid., 15.

Objectives

1. Provide a _____ for utilizing organizational learning theories in ministry.
2. Gain an understanding of three classical organizational learning theories: their strengths, similarities and differences.
3. Gain an understanding of why, how, and under what circumstances, people share knowledge.
4. Appreciate the integral role of the IIP in promoting organizational learning through knowledge management and sharing _____ ministry teams.
5. Recognize the Value of Explicit and Tacit Knowledge.
6. Become aware of various obstacles _____ for individuals and teams to share knowledge.
7. Appreciate the role of criticism, self-criticism, and the ethic of care in the learning process.

Terms

- **Organizational learning** refers to the study of the _____ of and within organizations, largely from an academic point of view.
- **A Learning Organization** is seen as an entity, an ideal type of organization, which has the _____ effectively and therefore to prosper. “Those who write about learning organizations generally aim to understand how to create and improve this learning capacity, and therefore they have a more practical impact and a performance agenda.”²

Commented [A2]: Receptive theology – “What do you have that you did not receive.” (1 Cor. 4:7)

² Ibid.,3.

- **Learning:** When one's actions _____ based on new knowledge. (See Senge on 'Metanoia'.)
- **Knowledge:** The Word of God and the fear of the Lord. (Theological) Knowing something with familiarity gained through experience or association. (Webster Dictionary)
- **Knowledge Management:** The process of acquiring, sharing, storing, and retrieving knowledge to be used to benefit man. (also called "process knowledge")
- **Knowledge Stewardship:** The process of acquiring, sharing, storing, and retrieving both physical and spiritual knowledge to be used for God's glory and to benefit one's neighbor.
- **Knowledge-Based Economy:** A contemporary intra-disciplinary driven mindset and environment (workplace). A move away from the industrial era mindset towards shared responsibility, mutual trust, and respect to promote collective and continuous learning.³
- **Knowledge Coordination:** Sharing across boundaries meaningful information (knowledge) to improve well-developed process, fix a broken process, or create a new process.⁴ Creating pathways for information crossover.
- **Tacit Knowledge:** Tacit knowledge is not easily written down or communicated to another person. It tends to be instinctive, illusive, and therefore informal knowledge.
- **Explicit Knowledge:** Explicit knowledge is readily written down and communicated to another person. Explicit knowledge can be both casual and formal. When it is written into the congregation's governing documents the explicit knowledge is formalized.

³ Ibid., 39 – 41.

⁴ Ibid., 33.

- **Multiteam System:** Two or more teams that interface directly and interdependently in response to environmental contingencies toward the accomplishment of collective goals. People dedicate 100% of their time to one team.⁵ Sometimes called ‘parallel boards’ in church governance.
- **Multiple Team Membership:** People splitting their time across multiple team memberships while simultaneously juggling several projects.⁶ With the objective to achieve information cross-over.

THEOLOGICAL BASIS FOR ORGANIZATIONAL LEARNING

The theme of learning and knowledge is prevalent throughout the Bible, mostly in relation to our knowledge of God, but also to knowledge generally (i.e. stewardship). King Solomon writes in Proverbs 1, “Let the wise listen and add to their learning and let the discerning get guidance” (Proverbs 1:5, NIV). Interestingly, Solomon personifies wisdom and knowledge as if “they”

_____.

Adam was originally made in God’s image and God “put him into the garden of Eden to dress it and to keep it” (Genesis 1:26; 2:15). At that point, Adam had perfect knowledge of God and, it seems, he also had the requisite knowledge to be steward of creation. Schwandt and Marquardt acknowledge the peculiar role humans have in relation to other creatures _____. They assert, “Our

⁵ Ibid., Mortensen, Mark, et al., “Conditions Enabling Effective Multiple Team membership,” (MIT, Harvard, and Boston College.), 2 – 3.

⁶ Ibid.

Commented [A3]: In Genesis 1:26 – 28, God creates man in His image and says, “and let them rule” over creation. Being created in the image of God establishes man’s responsibility “over” the rest of God’s creation and bestows on him the necessary knowledge to be steward over a fearfully and wonderfully made creation.

associated responsibility as human beings [is] to _____ to knowledge creation through this learning process.” Schwandt and Marquardt describe this role as being ‘peculiar,’ almost acknowledging an _____ treatment of humans in relation to the rest of creation.

Commented [A4]: “peculiar role” my emphasis.

Satan promised Adam and Eve they shall have “knowledge,” promising, “...you will be like God, knowing good and evil” (Genesis 3:5). Some theologians hold, “the Fall was a fall up and not down.”⁷ But Pieper asserts, “While natural man, after the Fall, still retains a certain amount of intelligence in natural things, he is utterly incapable of understanding spiritual matters, the things that have to do with obtaining of God’s grace and salvation. In his natural condition, man regards the Gospel, his only salvation after the Fall, as foolishness...”⁸ Luther says after the Fall, “Adam is totally _____ and has become quite another man.”⁹ Pieper says, “The _____ of Adam has suffered an eclipse.”¹⁰

Adam and Eve originally knew how to care for the creation; but, after the Fall, certain knowledge was gained (learned) and certain knowledge was lost (unlearned). The responsibility to “rule” over creation remained, but the resources (including knowledge) to do so _____. Now man must _____ how to take care of a Fallen creation, with limited resources, and to exhort the God of all knowledge.

Commented [A5]: Human pattern difficulty with holding on to knowledge. “The word of the Lord was ‘rare’ in those days”, “Dark ages”, they had forgotten God...difficult to be good stewards without good knowledge.

⁷ Pieper, Francis, “Christians Dogmatics: Volume I,” (Concordia Publishing House, St. Louis, MO, 1950.), 527.

⁸ Ibid., 544.

⁹ Ibid., P. Francis.

¹⁰ Ibid., P. Francis, 545.

Congregations face the burden of limited resources (emotional, physically, spiritually, etc.) when they lose their pastor. The Intentional Interim Ministry (IIM) acknowledges this challenge and comes alongside the congregation during that loss to aid in resourcing. The goal of the IIM is not to relieve or remove the responsibility that belongs to the congregation, but to be a resource to the congregation in doing their work. The IIM Agreement states: “The only persons who can make fundamental change in a system are the people involved in the emotional process themselves. Although the Intentional Interim Pastor has adaptive leadership skills, tools, and techniques to encourage it, the change that needs to happen comes by God’s grace to the Congregation from the inside out – not from the outside in.”

Restating Vaill, who says, “Reflection is the capacity to ‘notice oneself noticing,’”¹¹ there is a role in stewardship of the knowledge of stewardship. The IIM leads the congregation and its leaders (guardians and stewards of knowledge) into a _____ of learning to document and formalize the congregation’s learning and knowledge. This occurs using deliverables (e.g. reports) by the Transition Task Force (TTF) team and the Intentional Interim Pastor. These deliverables are socialized throughout the congregation and the district, giving opportunity for knowledge retrieval, reflection and continual learning. Deliverables include recommendations for action, which further the congregation’s taking responsibility in their corner of God’s creation – and acting on new learning.

Commented [A6]: Congregations and their professional church workers do not often view themselves as lacking knowledge resources!

Commented [A7]: Work must be done by the people in the organization.

Commented [A8]: Stating the obvious. I often will ask “how did you do this last year? The reply is often “I don’t know.” Or “I don’t remember.”

Commented [A9]: The string on the finger. Write it down.

Commented [A10]: Feedback, action, and adoption.

CLASSICAL ORGANIZATIONAL LEARNING THEORIES

¹¹ Ibid., 117.

Two classical theories – **experiential** learning theory and **adaptive & generative** learning theory – represent the cognitive school of thought on organizational learning, while a third theory – **assimilation** theory – coincides with the behavioral school. Carol Leavitt notes, “The cognitive school reasons that learning occurs through our mental models, structures, or schemas, which enable us to understand events and situations and to interpret and respond to our environments. The behavioral school asserts that we learn by gaining insight and understanding from experience through experimentation, observation, analysis, and examination of outcomes” (Azmi, 2008, p. 61).

Commented [A11]: The former is a thinking-based model, while the latter is an action-oriented one.¹

Experiential Learning

David Kolb’s (1984) experiential learning theory (ELT) pioneered the field of thought in _____ and _____ development and contributing to many of the organizational learning theories in use today. Levitt summarizes Kolb’s contributions observing, “Its basic premise is that learning occurs through the combination of grasping and transforming _____...This learning process is characterized as a cycle in which the learner proceeds through the sequence of experiencing, reflecting, thinking, and acting in a repeating progression that is unique to each learning circumstance. This learning cycle can be entered at any point, but the stages are always followed in sequence.”¹²

Adaptive and Generative Learning

Leavitt notes, Kolb’s ELT model influenced scholar Peter Senge, who evolved another cognitive theory of organizational learning that prominently identified mental models - deeply ingrained

Commented [A12]: Learning through “thinking.”

¹² Ibid., Leavitt, 7.

assumptions, generalizations, or pictures and images that influence how we understand the world and how we act (1990, p. 8) – as a crucial component. Another four components required for learning at the individual, team, and organization level are personal mastery, building shared vision, team learning, and systems thinking (p. 7).¹³

One of the important principles of Senge's work is the differentiation between _____ and _____ learning. He characterizes adaptive learning as focusing on the foundation of _____, and amending that with new thinking, to accomplish an objective. This kind of learning is particularly salient to organizations seeking continuous _____. For example, understanding the gaps in existing ministry teams communicating or focusing on common goals. Senge's adaptive learning "enables the generation of additional ideas by which to close those gaps."¹⁴

By contrast, when new congregational vision, ministries, or ministry teams are urgently needed Senge approach recommends "a different kind of learning is required to produce radical new ideas and discontinuous change – which is the nature of generative learning (Harrison, 2000). This was validated soon afterward by scholar James March (1991), who expanded on this theory to identify two modes of organizational learning: 1) _____, or the use of existing knowledge and resources to

¹³ Ibid., Leavitt, 7 – 8.

¹⁴ Ibid., Leavitt, 8.

gain value from what is already known; and 2) _____, or thinking in previously unused or unforeseen ways (i.e., seeking new options, experimenting, and conducting research) (p. 72).”¹⁵

However, too much _____ of new knowledge (generative learning) leaves the organization wishing for returns on its investments, while too much _____ of existing knowledge (incremental learning) may result in it becoming outdated and useless. The challenge here is to create the appropriate balance – even though it may be a moving target – between the need to develop new knowledge versus leverage existing knowledge.¹⁶

Assimilation Learning

Different from the cognitive theories, behavioral approaches to organizational learning emphasize the action-based changes that take place as individuals learn through **performance**. These approaches characterize learning as observable, rational, and quantifiable. Scholars Nevis, DiBella, & Goulds’ (1995) theory presents a learning process featuring three unique stages: 1) knowledge _____, consisting of the development or creation of skills, insights, and relationships; 2) knowledge _____, characterized by the dissemination of what has been learned; and 3) knowledge _____, comprised of the integration of learning to make it broadly available and generalized to new situations (p. 74). All three of these stages are strongly behavior-linked and focused on practical application more than cognition.¹⁷

Commented [A13]: Learning through “doing” or “acting”.

CONTRIBUTORS

Peter M. Senge (1990)

¹⁵ Ibid., Leavitt.

¹⁶ Ibid., Leavitt, 11.

¹⁷ Ibid., Leavitt, 9.

Systems Thinking

Senge observes, “To grasp the meaning of ‘metanoia’ is to grasp the deeper meaning of ‘learning,’ for learning also involves a fundamental shift or movement of mind.”¹⁸ The Greek term is often described in theological terms as repentance, or a _____. Senge links the origin of the word to learning. He explains, “Through learning we re-perceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the _____ process of life.”¹⁹ He concludes, “This, then, is the basic meaning of a ‘learning organization’ – an organization that is continually expanding its capacity to create its future.”²⁰

Senge observes a common disability in organizational leadership is, “The illusion of taking charge.” Organizations have the tendency to _____ first responders, men of action, and people who know their own mind. “Being ‘proactive’ is in vogue. Managers frequently proclaim the need for taking charge in facing difficult problems,” he observes. In the congregational setting such proactive behavior can _____ and _____ others’ involvement. Also, such take-charge behavior can lead to only addressing partial concerns and creating

Commented [A14]: It may be a learning organization is characterized by repentance. Luther's first thesis of the 95, the life of the Christian is characterized by repentance. Repentance is another way of describing the learning process. The “repentance” process is a learning process.

Commented [A15]: Through repentance we are changed. God gives us a new heart and mind.

¹⁸ Senge, Peter, “The Fifth Discipline: The Art & Practice of the Learning Organization,” (Doubleday, a division of Bantam Doubleday Dell Publishing Group, Inc., 1540 Broadway, New York, New York 10036, 1990.),

¹⁹ Ibid.

²⁰ Ibid.

little forward movement for the church ministry. Senge concludes, “All too often, ‘proactiveness’ is reactiveness in _____.”²¹

Chris Argyis and Donald A. Schon (1996)

Organizations as Collectives

Argyris and Schon tackle the basic question: “What is an organization that it may be able to learn?”²² They answer this question by treating an organization as a _____, rather than impersonal, entity.²³ But, the personal organization is made up of individuals. Just because individuals might learn something _____ the organization has learned something: “In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do.”²⁴ In contrast, as in the case of the military and the phone company, “there are situations in which an organization seems to know far more than its individual members” due to “structures, procedures, and memories built into the fabric or organizations...”²⁵ Argyris and Schon assert that “when something that looks like organizational learning occurs, it seems, not infrequently, to have little to do with the person _____.”²⁶ Instead, “we might think of clusters of individual members as the agents who learn ‘for’ the larger organization to which they belong.”²⁷

²¹ Ibid., 21.

²² Ibid., 6.

²³ Ibid., 5.

²⁴ Ibid.

²⁵ Ibid., 7.

²⁶ Ibid.

²⁷ Ibid.

Failure of an organization to learn is related to the degree views differ among individual members of the organization.²⁸ Argyris and Schon warn that as long as “stories remained scattered and uninterpreted, the map of the development process remained vague, and the diagnoses of the development problem remained ambiguous.”²⁹ Argyris and Schon describe that, in organizational learning, “There is a continual, more or less concerted _____ of individuals’ images of their activity in the context of their collective interaction.”³⁰

Commented [A16]: Interestingly, the Gospel writers, the message of Scripture is a unifying story down through the ages thanks to the work of the Holy Spirit. And hence there is shared knowledge or understanding.

David R. Schwandt and Michael J. Marquardt (2000)

Action/Reflection

Schwandt and Marquardt claim that today’s successful organizations are _____ organizations, working with their minds more than with their hands. “Learning is the new form of labor,”³¹ Schwandt and Marquardt say, and “learning inside the organization _____ than change outside the organization or the organization will not survive.”³² Relying on *past* knowledge is not learning and may even be counterproductive, Schwandt and Marquardt continue, “tend[ing] to misdirect inquiry rather than

²⁸ Ibid., 67.

²⁹ Ibid.

³⁰ Ibid., 15.

³¹ Ibid., 1

³² Ibid., 3.

facilitate problem resolution.”³³ Training in such knowledge “may do little more than to make organizations proficient in _____.”³⁴

Using action/reflection as a subsystem of the organizational learning system, Schwandt and Marquardt observe that when organizations are able to examine their actions and assign meaning to new information, they are _____. They maintain, “The ability to reflect on information is not only critical to the organization’s performance, it is also _____ to its self-regeneration. The Action/Reflection subsystem of actions provides the path for altering cultural values and assumptions so that the organization can achieve long-term adaptation.”³⁵

Mark Easterby-Smith and Marjorie A. Lyles (2011)

Short History

Easterby-Smith and Lyles detail the history of the related fields of organizational learning and knowledge management. They observe, “The idea that an organization _____ and knowledge _____ over time was [a] breakthrough, which was first articulated in the book by Cyert and March (1963).”³⁶ In their work, Cyert and March assert: “An organization...changes its behavior in response to short-run feedback from the environment according to some fairly well-defined rules. It changes rules in response to longer-run feedback according to some more general rules, and so on.”³⁷ Argyris and Schon criticized Cyert and March, “pointing out that

³³ Ibid., 3.

³⁴ Ibid.

³⁵ Ibid., 121.

³⁶ Ibid., 11.

³⁷ Ibid.

human behavior with organizations frequently does not follow the lines of _____.”³⁸ Rather, Argyris and Schon maintained that organizations and individuals will “_____ from the unpleasant experience of learning by establishing defensive routines.”³⁹

Easterby-Smith and Lyles further describe “Dewey’s view that learning takes place through social interaction and yet cannot be passed from person to person as if it were a _____.”⁴⁰ They also share that “Polanyi is best known for his distinction between tacit and explicit knowledge,”⁴¹ while “Penrose is cited less frequently, but her ideas on the significance of the internal (human) resources of the firm are fundamental...Penrose proposes the importance of ‘_____’ within an organization which can lead to innovation...”⁴² Penrose’s views give traction to the social constructionists “who emphasize that organizations know more than the sum of the knowledge of individuals within them; they also emphasize the role of experience and the fact that knowledge comes from formal teaching and from personal experience.”⁴³

Commented [A17]: Learning together...in good times and bad, etc.; conflict, change, pastoral transitions are all pregnant moments for organizational learning and knowledge acquisition and utilization.

Commented [A18]: But see Argyris and Schon page 11: some organizations know less than the sum of the knowledge of individuals.

Commented [A19]: Explicit knowledge

Kathryn S. Roloff, Anita W. Woolley, and Amy C. Edmondson (2011)

³⁸ Ibid.

³⁹ Ibid.

⁴⁰ Ibid., 9.

⁴¹ Ibid., 10.

⁴² Ibid.

⁴³ Ibid.

Teaming

Roloff, Woolley, and Edmondson recognize a key problem organizational theorists are trying to address is how best to design the organization “to manage time, attention, and flow of information among individuals and organizational units.”⁴⁴ Organizations are continuously challenged to be more productive, more innovative, and quicker, at lower costs. The authors observe, “To accommodate the demands for higher productivity and faster learning, organizations have increasingly turned to using _____ work units, such as teams, to accomplish their most important tasks.”⁴⁵

Recommended work place structures have evolved from “hierarchical structures, to team-based work in matrix structures, and ultimately to team-based work in multi-team systems.”⁴⁶ Roloff, Woolley, and Edmondson note, “Multiple team membership seems especially common in many industries and settings in which learning and productivity are both especially critical, including information technology.”⁴⁷ The authors discovered that, “As more teams _____, there is increased resource interdependence among different units of the organization.”⁴⁸ The advantage of such team play and collaboration is the creation of “_____” for information to flow and come together, avoiding information getting

Commented [A20]: Church-school ministries have equivalents: ministry programs, church-school budget, maintain facilities and missions with fewer dollars and rising administrative and labor costs. Not to mention keeping up with technology.

Commented [A21]: Learning curve theory research points to the benefits of teams in lower cost and increasing output.

Commented [A22]: More than just sitting on multiple teams. There is an active effort to promote teaming models to accomplish information cross-over.

⁴⁴ Kathryn S. Roloff, Anita W. Woolley, and Amy C. Edmondson, “The Contribution of Teams to Organizational Learning,” (Handbook of Organizational Learning & Knowledge Management, Second Edition, A John Wiley and Sons, Ltd, Publication, West Sussex, United Kingdom, 2011.), 249.

⁴⁵ Ibid., 250.

⁴⁶ Ibid.

⁴⁷ Ibid.

⁴⁸ Ibid. Note: Multiple teams sharing members has been referred to as a ‘multi coupled project organization’ (Soderlund, 2002: 428) or ‘intra-organizational connectivity’ (Lazer and Friedmann, 2007), or ‘multiple team membership’ (MTM) (Mortensen, Woolley, and O’Leary, 2007).

stuck in the organizational system. Team play almost forces the various parts of the whole into an inter-dependence, or reliance, on one another, thus promoting knowledge throughout the whole.

Commented [A23]: Much needed feature between church and school, staff and boards, ministry teams, etc.

10 WAYS FOR THE IIP TO FASHION A LEARNING ORGANIZATION

1 – Motivating (Foss and Mahnke)

Organizational learning researchers have historically concluded that “human nature” within organizations has a bend towards “self-interest” (opportunism) and “using asymmetric information to one’s advantage and the other party’s disadvantage after a contract has been concluded...”.⁴⁹ However, Foss and Mahnke maintain a neutral posture (maybe learning posture) to this fact acknowledging, “such motivational assumptions fundamentally serve to highlight the – presumably undisputed – fact that actors often have very _____; opportunism and similar assumptions are stark ways of highlighting this.”⁵⁰

Instead of viewing opportunism as an inherent evil, or “self-interest with guile,” these authors encourage a more academic approach to understanding the value behind the individual’s motivations and self-interests. Foss and Mahnke point out, “the motivational assumptions serve to emphasize that economic organizations need to be designed with an eye to the possibility that

⁴⁹ Ibid., 129.

⁵⁰ Ibid.

_____ actors may act in a morally hazardous or opportunistic manner.”⁵¹

Organizations that structure their resources to _____ individual motivations and self-interests prove the most effective learning organizations. One knowledge manager put it this way, “If there is no offsetting benefit for sharing knowledge in terms of money and recognition, or the process by which one does so is arcane or bureaucratic, or it is difficult to find the right fora, then organizational costs _____, and participation _____ proportionally.”⁵²

Another suggestion for improving organizational motivation is the *delegation of* _____ in the division of labor. The authors note this could be “ranging from the trivial (the right to work with the company’s vacuum cleaner) to the all-important (the right to make decisions on major investment projects).”⁵³ Many managers will attempt to compensate employees for their individual human capital investments. Foss and Mahnke note, “Thus, in professional service firms, often employees with a long tenure and good demonstrated performance become partners.”⁵⁴ Additionally, they caution managers to respect the delegation of decision rights to employees warning, “managerial _____ once decision rights have been delegated” can be “very destructive for motivation.”⁵⁵

In terms of the IIM, the *delegation of decision rights* concept is seen most readily in the powers given to the _____. This group of twelve individuals, who are not in a

⁵¹ Ibid.

⁵² Ibid.

⁵³ Ibid.

⁵⁴ Ibid., 130.

⁵⁵ Ibid.

leadership position, are given discretion over leading the congregational self-study (including cottage meetings) and then preparing the final report with recommendations to the congregation on how to move forward. In terms of pastoral leadership, sharing and delegating decision rights is par for the course; and is seen often with how the IIP empowers the senior leadership team, the transition task force, and other ministry teams.

Another challenge to motivation is the problem of “gathering and building-up of specialized knowledge and skills” and then be asked to _____ with no clear benefit. The authors note this is a cost consideration of knowledge management practice, noting, “they are not likely to be willing to share the relevant knowledge and skills with other agents, unless they are properly compensated.” What does that look like with volunteers and church-school staff? There are a host of related problems, a significant one being how to negotiate appropriate compensation for specialized knowledge and skills. The authors warn against, “forced knowledge management initiatives” as they may be viewed as “_____” by the employees. The likely solution is, say the authors, “to invest in human capital and to share knowledge embodied in this capital is by giving the relevant employees appropriate incentives, perhaps even making them partners through providing ownership rights.”⁵⁶

2 – Teaming (Edmonson, Foss and Mahnke)

⁵⁶ Ibid.

A problem facing some churches and professional church workers is a lack of desire to keep up with new demands; often because it is _____. Roloff, Woolley, and Edmondson recommend **working on teams** as a model for learning to keep up with new demands. They observe that “organizations have increasingly turned to using **smaller and more flexible work units, such as teams,** to accomplish their most important tasks.”⁵⁷

Commented [A24]: May sound like more work, but it is less. In this case “more is less?”

Commented [A25]: TTF and TTF Sub Teams

Roloff et al. note the advantage of such team play is the ability to **“carry lessons learned across units”**⁵⁸ by creating “more paths” for information to flow and come together, avoiding information _____.⁵⁹ Churches and school ministries could use a multiple team

Commented [A26]: Significant opportunity for the IIP to model socializing the IIM concepts and themes in reports, focus groups, and various ministry communications.

membership model to open pathways for information _____: such as church members crossing over from one board to another, or from church boards to the school board; from dialogue between the pastor and the principal, and from the pastor **playing an ex officio role on** every board. Many IIM processes consists of cottage meetings, town halls, focus groups, and quarterly team huddles. These activities invite members to join multiple teams and to participate in organizational learning.

Commented [A27]: More active role, process observer, anything. He just needs to have a task on the team.

The _____ is a good example of someone who adopted a multiple team model. **He joined the leadership teams in the churches of Galatia, Ephesus, Rome, Colossi, Philippi, Thessalonica, and Corinth.** Intentional Interim Pastors (IIP), too, have opportunity to hold multiple team memberships with many churches and to increase their personal learning while

Commented [A28]: The very nature of the Gospel necessitates a multiple team membership model approach.

⁵⁷ Ibid., 250.

⁵⁸ Ibid., 251.

⁵⁹ Ibid., 250.

_____ from other teams across organizational boundaries (cross-pollination).

Teams are a wonderful source of knowledge creation, but they operate at a _____.⁶⁰ Some of the benefits of teams are collaboration, and cross-pollination, fertilization and integration of ideas. But, Foss and Mahnke observe, “While knowledge creation in teams has its virtues, there are special difficulties associated with aligning interests of team members. Not only will teams be particularly prone to moral hazard, notably in the form of _____, but the right form of incentive may also be contingent on the type of team at hand.”⁶¹

The authors explain, “team members may _____ on other team-members’ contribution to knowledge creation. This is so because the benefits of withholding marginal effort accrue to each shirking member while the resulting losses accrue to the team as a whole.”⁶² The _____, the more shirking and free-riding will occur.⁶³ The authors argue that “When capable and willing team members are forced to support free riders, they often _____ effort or else leave the team.”⁶⁴

Commented [A29]: The volunteer syndrome.

⁶⁰ “Knowledge creation in teams yields benefits at substantial costs,” *ibid*, 142.

⁶¹ *Ibid.*, 140.

⁶² *Ibid.*

⁶³ *Ibid.*

⁶⁴ *Ibid.*, 141.

To solve for some of the free-riding and withdrawing, Foss and Mahnke suggest _____ individual and team incentives. They warn against ruling out individual recognition observing, “Many recommendations in the knowledge management literature are mistaken when they note that individual rewards may be the antithesis to teamwork.”⁶⁵ Rather, the authors point out, “An organizational economics perspective urges managers not to _____ possibilities to induce individual contributions on which team performance ultimately rests.”⁶⁶ Roloff et al. advocate building trust within teams for the best learning environment; that is, “promoting team learning by fostering a positive interpersonal climate in teams...”.⁶⁷

Commented [A30]: Assigning a role gives team members both responsibility and authority, which equals a safe environment.

From an organizational economics perspective, the authors suggest “(1) the _____ of the team, (2) trade-offs between individual and team _____, (3) exclusion rules, and (4) matching the varying degrees of _____ to incentive design” will determine the team’s success.⁶⁸ Therefore they recommend a comparative analysis of “the benefits of individual learning in firms as well as hiring of external expertise...two alternative mechanisms of organizational learning.”⁶⁹

Commented [A31]: i.e. hiring an expert consultant.

3 – Framing (Edmonson)

Framing can help “people interpret the ambiguous signals that accompany change in a positive and productive light ...”.⁷⁰ In her reflection on a research project involving the implementation of a new medical process in 16 different hospitals, Edmondson concludes, “by the time the research was over

⁶⁵ Ibid.

⁶⁶ Ibid.

⁶⁷ Ibid., 258.

⁶⁸ Ibid.

⁶⁹ Ibid.

⁷⁰ Ibid., 83 – 4.

[framing] turned out to be the single most powerful factor explaining success.”⁷¹ She notes, “differences in how the project was framed by each _____ gave rise to different _____ about the technology and the need for teamwork.”⁷² Edmondson observed the key aspects of successful “framing implementation” were: the leaders’ _____; the team’s _____, and the project _____.⁷³

Framing includes simple things, such as leaders _____ their own team members. She observed, the “successful leaders simply recognized and communicated that in doing MICS they were dependent on others.”⁷⁴ She encourages, “Leaders must _____ convey their own sense of interdependence with others for a successful outcome, express their own fallibility, and communicate a need for collaboration.”⁷⁵ For this to occur, “leaders must frame their role in the project in ways that invite others to participate fully.”⁷⁶ Not only does the leader’s role need framing, but also the team members’ roles. Edmondson notes, “thoughtfully framing the roles that different people should play in a joint effort is important to building a cohesive team and an effective process.”⁷⁷ Finally, framing is not complete without _____ the project’s purpose. Edmondson charges, “The leader’s

⁷¹ Ibid., 90.

⁷² Ibid.

⁷³ Ibid.

⁷⁴ Ibid., 94.

⁷⁵ Ibid., 96.

⁷⁶ Ibid.

⁷⁷ Ibid.

job is to articulate and help people cohere around this shared purpose.”⁷⁸ She observes two types of purposes: aspirational and defensive.

4 – Learning from Failure (Edmondson)

Failure is not easy to discuss. Edmondson encourages organizations to look for small failures. In her research she observes, “Small failures are often overlooked.”⁷⁹ She explains, “Due to a natural desire to protect their image or status, very few people would voluntarily choose to

_____ their own mistakes. But to capture the value of small failures, individuals and groups must learn to acknowledge their performance gaps.”⁸⁰ Furthermore, she observes, “Managers have an added incentive to disassociate themselves from failure because most organizations _____ success and _____ failure.”⁸¹ She concludes, “A natural consequence of punishing failures is that employees learn to _____ them, let alone analyzing them or experimenting if the outcome is uncertain.”⁸²

Edmondson observes an interesting phenomenon in more complex systems. She notes, “the more complex the situation in which we find ourselves, the less likely we will be to understand the _____ between failure and fault.”⁸³ She notes, “Logically, we can see that many of the things that go wrong in organizations couldn’t have been prevented, or may come from thoughtful exploration of a new area.”⁸⁴ However, “The unfortunate consequence” Edmondson asserts, “of this gap

Commented [A32]: Confess...

⁷⁸ Ibid., 100.

⁷⁹ Ibid., 153.

⁸⁰ Ibid.

⁸¹ Ibid., 156.

⁸² Ibid., 158.

⁸³ Ibid.

⁸⁴ Ibid., 160.

between logic and practice is that many failures go unreported or misdiagnosed and their _____ are lost.”⁸⁵

Edmondson notes that failures in *routine operations* “are usually caused by small process deviations”⁸⁶ but failure in *complex operations* “are particularly challenging because the stakes tend to be high.”⁸⁷ She therefore concludes, “analysis usually reveals an organization’s _____, rather than a human, to be at fault when disaster strikes.”⁸⁸ Finally, Edmondson sees failure in the *innovation operations* category _____ due to the very nature of the activity. She says, “To innovate, people must test ideas without knowing in advance what will work.”⁸⁹

_____ from failure requires a different “psychological and organizational” atmosphere. Edmondson encourages “a spirit of curiosity and openness, as well as exceptional patience and a tolerance for ambiguity.”⁹⁰ She refers to such traits as “inquiry orientation,” which “is characterized by the perception among group members that multiple alternatives exist, and that frequent dissent is necessary. These perceptions result in a deeper understanding of issues, the development of new possibilities, and an awareness of others’ reasoning.”⁹¹ She lists several **strategies for learning from failures**: support systems for identifying failure; embrace the messenger; gather data and solicit

Commented [A33]: Uncertainty increases along “The Process Knowledge Spectrum” (e.g. Routine, Complex, and Innovation). Edmondson, Teaming, 33.

Routine Operations: Learning focused on process improvement. Little room for uncertainty.

Complex Operations: Learning focused on problem solving. Unpredictable interactions.

Innovation operations: Learning is focused on “experiment and generate new possibilities.” Requires trial and error. Edmondson, 35. Uncertainty abounds.

Commented [A34]: Process, governing documents, job descriptions, etc.

⁸⁵ Ibid.

⁸⁶ Ibid., 161.

⁸⁷ Ibid., 162.

⁸⁸ Ibid.

⁸⁹ Ibid., 163.

⁹⁰ Ibid., 168.

⁹¹ Ibid., 169.

feedback; reward failure detection; support systems for analyzing and discussing failure; convene interdisciplinary groups; analyze data systematically; establish and support systems for deliberate experimentation; reward experimentation and its inevitable failures; and, design intelligent failures for learning.⁹²

5 – Promoting Psychological Safety (Edmondson)

Edmondson warns, “interpersonal fear can dominate modern work life and thwart the collaboration that is desperately needed in the knowledge intensive organizations that dominate today’s economy.”⁹³ She explains, “The term psychological safety describes a climate in which people feel free to express relevant thoughts and feelings.” She calculates, “the ability to _____ and _____ while colleagues watch can be unexpectedly difficult.”⁹⁴ Yet she insists “frank conversations and public missteps must occur” in order “to realize the promise of collaboration across differences.”⁹⁵

In 2003, the space shuttle Columbia lost its seven passengers on its attempt to reenter the earth’s atmosphere. It was later discovered that a low-level engineer had emailed his immediate superior about an exterior piece of foam that had detached during the shuttle’s launch. The low-level engineer had noticed this potential hazard when watching a video replay of the shuttle’s launch. During the investigation after the Columbia had disintegrated, it was discovered this low-level engineer did not report the hazard higher than his immediate supervisor, because, “engineers were often told not to send

Commented [A35]: “Trauma” is feeling unsafe. Organizations can experience trauma (e.g. simple/complex).

⁹² Ibid., 170 – 182).

⁹³ Ibid., 118.

⁹⁴ Ibid.

⁹⁵ Ibid.

messages much higher than their own rung in the ladder.”⁹⁶ Edmondson concludes such tragedies of not speaking up in the workplace are “an all-too-common organizational dynamic.”⁹⁷ People don’t want to stand out in fear they may draw undesired attention. She notes, “people are reluctant to voice concerns or engage in behaviors that could threaten their image within a wide spectrum of industries and organizations.”⁹⁸

Another example is the case of military training pilots: “The prospect of speaking up to the superior officer brings significant emotional costs” and, in research, it was observed junior pilots would risk their own lives to avoid “being chastised or ignored.”⁹⁹

Edmondson offers examples of how psychological safety promotes teaming and organizational learning, and how to encourage psychological safety. In brief, she describes, “psychological safety makes it possible to give _____ feedback and have _____ conversations without the need to tiptoe around the truth.”¹⁰⁰ Which (in practice) means, “if they make a mistake others will not penalize or think less of them for it.”¹⁰¹ Ultimately, she concludes, “This belief comes

⁹⁶ Ibid., 116.

⁹⁷ Ibid.

⁹⁸ Ibid.

⁹⁹ Ibid., 117.

¹⁰⁰ Ibid., 118.

¹⁰¹ Ibid.

about when people both trust and respect each other, and it produces a sense of confidence that the group won't embarrass, reject, or _____ someone for speaking up."¹⁰²

Research shows that "the most important influence on psychological safety is the nearest _____."¹⁰³ Edmondson offers eight leadership behaviors which cultivate psychological safety: be accessible and approachable; acknowledge the limits of current knowledge; be willing to display fallibility; invite participation; highlight failures as learning opportunities; use direct language; set boundaries; and hold people accountable for transgressions.¹⁰⁴

6 – Accessing Tacit Knowledge (Deming and Tsoukas)

Many organizational theorists would maintain the necessity of converting tacit knowledge to



explicit knowledge. The well-known engineer, statistician, and professor, W. Edward Deming, famously said, "If you can't describe what you are doing as a process, you don't know what you are doing." Peter B. Vaill says, "Reflection is the capacity to 'notice oneself noticing'; that is, to step back and see one's mind working in relation to its projects."¹⁰⁵

Interestingly, Haridimos Tsoukas argues against the idea of the need to convert **tacit knowledge** to **explicit knowledge**. He argues, "The main one (misunderstanding) is that tacit knowledge is still

Commented [A36]: Sort of like the distinction between the cognitive and behavioral theories: does it happen through thinking or acting?

¹⁰² Ibid., 119.

¹⁰³ Ibid., 117.

¹⁰⁴ Ibid., 139.

¹⁰⁵ Ibid., 117.

mostly seen on the conversion model: as knowledge awaiting its conversion to explicit knowledge.”¹⁰⁶

“Tacit knowledge” notes Tsoukas, “underlies all skillful action, an important feature of organizational life.”¹⁰⁷ He notes, “Organizational members know lots of things about what they do although, paradoxically, when they are asked to describe how they do what they do, they often find it hard to express it in words.”¹⁰⁸ Tsouka argues that is because, “Effective performance depends on knowledge that cannot be explicitly formulated in full.”¹⁰⁹ And we access tacit knowledge not by rote explicit instructions, but through action.

Commented [A37]: Could talk about process here. Also, habituation i.e. how much of church behavior is from family of origin repetition?

The IIM leads the congregation and its leaders (guardians and stewards of process knowledge) into a formal process of learning to document and formalize the congregation’s learning and knowledge. I often ask organizational process questions during the interviewing and joining phases; such as, “How did you conduct last year’s pastor evaluation?” or “How did you conduct the pastor exit interview and farewell?” The question of whether accessing congregational process knowledge should be tacit or explicit, and whether accessing such knowledge should be cognitive or behavioral (action), is debated.

Commented [A38]: Stating the obvious. I often will ask “how did you do this last year? The reply is often “I don’t know.” Or “I don’t remember.”

7 – Leveraging, Dialoguing, and Finding Alignment (Senge)

Leverage

¹⁰⁶ Ibid., 455.

¹⁰⁷ Ibid., 455.

¹⁰⁸ Ibid.

¹⁰⁹ Ibid.

Building on his warning against reactive behavior, Senge argues for “leverage” as a strategic use of resources. He asserts, “The bottom line of systems thinking is leverage – seeing where actions and changes in structures can lead to significant, enduring improvements.”¹¹⁰ The leverage occurs when ‘significant’ and ‘enduring improvements’ are achieved. Senge further maintains, “the best results come not from large-scale efforts but from small well-focused actions.”¹¹¹ Too much effort is given to those matters which are of _____ in the grand scheme of things and consequently “we create our own market limits.”¹¹² The organization’s inclination is to focus on “low-leverage changes...on symptoms where the stress is greatest.”¹¹³ “As a systems thinker,” Senge advises, “you would first identify that key problem symptom, and then the symptomatic and fundamental responses to it.”¹¹⁴

Dialogue

Organizational learning occurs when there is a _____ exchange of ideas. Church and school ministry teams can cultivate learning simply through increased dialogue. Senge notes the observations of the famous Physicist Werner Heisenberg. “Heisenberg then recalls a lifetime of conversations with Pauli, Einstein, Bohr, and the other great figures who uprooted and reshaped traditional physics in the first half of the century” he writes. These conversations, which Heisenberg

Commented [A39]: This is the idea behind not allowing any crisis to be wasted; and the idea of focusing on leaders as they are the “immune” system of the whole.

Commented [A40]: See Ronald Heifetz on Technical Problems versus Adaptive Challenges.

Commented [A41]: For this to occur staff must be in proximity with one another.

¹¹⁰ Ibid., 114.

¹¹¹ Ibid.

¹¹² Ibid., 115.

¹¹³ Ibid.

¹¹⁴ Ibid., 120.

says, ‘had a lasting effect on my thinking,’ literally gave birth to many of the theories for which these men eventually became famous.”¹¹⁵

Senge marvels at “the staggering potential of collaborative learning – that collectively, we can be more insightful, more intelligent than we can possibly be individually.” Heisenberg’s contemporary, David Bohm, holds, “dialogue becomes open to the flow of a larger intelligence.”¹¹⁶ Senge suggests, “Dialogue, it turns out, is a very old idea revered by the ancient Greeks”¹¹⁷ and the church may think of Job and his three friends. “The _____ of dialogue,” Bohm suggests, “is to reveal the incoherence in our thought.”¹¹⁸ Senge asserts, “In dialogue people become _____ of their own thinking.”¹¹⁹ Bohm says that “Most thought is collective in origin. Each individual does something with it,” but it originates collectively by and large. “Language, for example, is entirely collective,” says Bohm.¹²⁰ “Bohm identifies three basic conditions that are necessary for dialogue: 1. All participants must ‘suspend’ their assumptions, literally to hold them ‘as if suspended before us’; 2. All participants must regard one another as colleagues; 3. There must be a ‘facilitator’ who ‘holds the context’ of dialogue.”¹²¹

¹¹⁵ Ibid., 238 – 9.

¹¹⁶ Ibid., 239.

¹¹⁷ Ibid.

¹¹⁸ Ibid., 241.

¹¹⁹ Ibid., 242.

¹²⁰ Ibid.

¹²¹ Ibid., 243.

Alignment

Senge tells Bill Russell's story of how a team of specialists aligned the Boston Celtics basketball team's collective skills to perform at the highest levels, winning eleven national championships in thirteen years. Senge describes "Russell's Celtics demonstrate a phenomenon we have come to call '*alignment*,' when a group of people function as a whole."¹²² He notes, "In most teams, the energies of individual members work at cross purposes."¹²³ He notes, "Individuals may work extraordinarily hard, but their efforts do not efficiently translate to team effort."¹²⁴

In ministry, the pastor, principal, and lay-leaders may all be quite gifted, but may work out of alignment with one another. Through _____, a team becomes focused, "individuals' energies harmonize," and "there is less wasted energy." This results from a "commonality of purpose, a shared vision, and understanding of how to complement one another's efforts."¹²⁵

8 – Forgetting: Intentional v. Unintentional (De Holan and Phillips)

Organizations sometimes make the decision to forget. De Holan and Phillips observe, "in some situations organizations may need to get rid of existing knowledge rather than develop new knowledge; in other words, to forget rather than to learn."¹²⁶ Forgetting is not easy. De Holan and Phillips explain that "organizations must somehow _____ old routines and practices in order to learn new and more appropriate ways of doing things."¹²⁷ Many churches cannot fathom the idea of intentionally

Commented [A42]: In the case of the Hotel Lutetia, it took "significant management effort and attention to succeed and, as the reappearing wine list attests, success is anything but guaranteed."¹

¹²² Ibid., 234.

¹²³ Ibid.

¹²⁴ Ibid.

¹²⁵ Ibid.

¹²⁶ Ibid.

¹²⁷ Ibid., 437.

_____ . However, it becomes a critical part of receiving a new pastor. Maybe the prior pastor was a gifted teacher and encouraged everyone to come over to his home anytime. The new pastor may not desire the unplanned home visits but is a gifted administrator and spends a great deal of time supporting ministry teams. The congregation will need to be open to forgetting, or unlearning, past behaviors to create room for new knowledge.

Making the decision to forget is _____ from losing track of something the organization may need to know. De Holan and Phillips note, “Organizations not only learn to do new things, but also forget to do things that they were able to do in the past.”¹²⁸ This is referred to as “organizational decay overtime, and that valuable knowledge is often lost.”¹²⁹ As organizational learning theory evolved an understanding of the learning curve model, “which established a positive relationship between the experience gained by performing similar activities and gains in productivity;”¹³⁰ it was observed that “performance in organizations deteriorates even in the presence of increasing cumulative volumes of production.”¹³¹ This led to the further observation “that knowledge accumulated by organizations can also deteriorate, decay, or otherwise disappear...”¹³² The authors note such knowledge loss may be purposeful and voluntary or involuntary forgetting.¹³³

Commented [A43]: Philippians 3:13 – “forgetting what is behind and straining towards what is ahead...”.

¹²⁸ Ibid.

¹²⁹ Ibid.

¹³⁰ Ibid., 436.

¹³¹ Ibid.

¹³² Ibid.

¹³³ Ibid.

Consequently, unintentional organizational forgetting produces undesired _____. For instance, “Organizations without practical mechanisms to remember what has worked and why will have to repeat their failures and rediscover their success formulas over and over again wasting resources in the process.”¹³⁴ To help distinguish between good and bad loss of knowledge in organizations, De Holan and Phillips differentiate by the type of knowledge loss: intentional (purposeful) or unintentional.

Organizational forgetting fits well into the IIM development tasks of coming to terms with history and committing to new directions. In coming to terms with history it is important for the congregation to consider what things will be left behind and what things will be carried forward, that is, what must be unlearned to move forward. And in committing to new directions the congregation must consider, depending on the new vision, what learning must be aborted and embraced.

9 – Developing Healthy Emotional Labor (Vince and Gabriel)

Vince and Gabriel propose that people are driven by their emotions to seek knowledge. In their words, “learning and knowledge are inextricably linked to emotion and passion – emotions, such as insecurity, fear, and anxiety _____ the quest for knowledge while passions of curiosity, exploration, and discovery may propel the quest for learning.”¹³⁵ They hold that “_____ evokes powerful emotional responses, positive and negative, from excited curiosity to fear of failure and humiliation, and that many of these emotions may be traced to childhood experiences.”¹³⁶

¹³⁴ Ibid., 439.

¹³⁵ Ibid., 333.

¹³⁶ Ibid.

“We often imagine that organizations are _____ places,” Vince and Gabriel narrate, “where we can use our intellectual abilities and our knowledge to implement decisions, to problem solve, and to take the organization forward.”¹³⁷ Instead, Vince and Gabriel propose that “organizations overflow with stated and unstated emotions; with complex inter-personal relations; and with politics and power.”¹³⁸ Studies of organizations should consider “the emotions that drive them or the emotions they prompt along the way.”¹³⁹

Fineman continues, “learning and knowledge have long been approached in the rationalist tradition as cognitive domains, objective and pure, into which emotion can only introduce impurity and subjectivity.”¹⁴⁰ Emotionality is gaining more appeal among scholars in recent years. Vince and Gabriel note, “Campbell (1989), for example, has argued that the suppression and denial of emotion were cardinal virtues of Puritanism, the Protestant ethic and even the Enlightenment project that saw everything as subordinate to the Commonwealth of Reason, Progress, and Science.” There is now a tug-of-war between too little emotion and too much.

The application for Vince and Gabriel is “the extent to which emotions are acquired, learnt, and socially constructed.”¹⁴¹ They note Hochschild’s (1983) work related to *emotional labor*, stating,

¹³⁷ Ibid.

¹³⁸ Ibid.

¹³⁹ Ibid.

¹⁴⁰ Ibid.

¹⁴¹ Ibid., 334.

“emotional labor came to be seen as part of the work _____ by many people, especially in service occupations; the emotions displayed by individuals in their workplace came to be accepted as much a part of the work they do as intellectual or manual work; and like intellectual and manual work, people can be _____ to do emotional labor. This opened up the possibility that emotions are _____ at the disposal of management, and that organizations that are able to deploy them effectively, in transactions with customers or among employees, can gain some advantage over their competitors.”¹⁴² This is a real thing in any employment context, maybe especially in church and school ministry. Many professional church workers are _____ by the role emotions should play in the classroom, the pulpit, or in general. Yet, each professional church worker is expected to present themselves with a certain level of hope and joy, to be affirming and caring, etc.

Vince and Gabriel assert that organizations have a “collective production of emotional scripts.” Organizations are the design of human beings, which the authors note are “emotional animals: subject to anger, fear, surprise, disgust, happiness, or joy, ease and unease.”¹⁴³ Regarding the difference between feelings and emotions, the authors turn to Fineman again, who makes this distinction: “feelings are fundamentally _____ experiences and that emotion can be defined as the _____ of feelings.”¹⁴⁴ With this emotion-feeling framework, Vince and Gabriel proceed to describe how individuals of organizations may act out on behalf of the organization’s feelings, almost like scape-goats. They hold, “both feelings and emotions are always social. In addition, one has to ask who is being represented in the public performance of feelings: is the performance of a

¹⁴² Ibid.

¹⁴³ Ibid., 336 – 7.

¹⁴⁴ Ibid., 337.

feeling (such as outrage, shame or fear) the ‘property’ of an individual, or might it also include those persons and collectives whose influences, conflicts, and defenses encourage the acting out of specific emotional scripts?”¹⁴⁵

“Criticism and self-criticism lie at the heart of learning” suggest Vince and Gabriel.¹⁴⁶ At the same time, criticism and self-criticism have been experienced as external bullying, or even worse, the internal voice of the super-ego which “can be harsher, more vigilant, more unreasonable, and harder to answer back than the voice of external authority.”¹⁴⁷ Since criticism and critical reflection are _____ to occur, Vince and Gabriel argue for them to be “balanced by an _____ which treats people in their different roles, as students, as subordinates and employees, as patients, and even as consumers, as _____ rather than as means to specific ends.”¹⁴⁸ The authors caution that an ethic of care is not a fuzzy feeling or an act of charity, instead, they assert, “It requires an ability to ‘notice what you are noticing’; to anticipate the needs and vulnerabilities of the cared for...An ethic of care may sometimes dictate taking difficult, hard, and unpleasant actions in support of a person, an institution, or even a thing one cares for.”¹⁴⁹ The authors observe several other characteristics of an ethic of care: 1) the ethic offers a partial containment

¹⁴⁵ Ibid.

¹⁴⁶ Ibid., 343.

¹⁴⁷ Ibid.

¹⁴⁸ Ibid.

¹⁴⁹ Ibid., 344.

of anxieties; 2) allows for mistakes to be recognized and corrected; 3) supports experimentation and responsible improvisation; and 4) promotes respect for human fallibility and insecurity.¹⁵⁰

When anxiety, uncertainty, and grief are high in a church that has lost its pastor, there is a tendency to rely heavily on decision-making activities which will logically move the organization towards the objective and rational process of calling the next pastor. Leadership teams and members are not _____ to a safe and intentional process of criticism and self-criticism. Criticism and self-criticism are required of Christians,¹⁵¹ but require great care from _____ of the gospel in their administration. Helping an organization deal with emotions, feelings, and political practices is the application of our Biblical teaching and a labor of love (*emotional labor*).

10 – Overcoming Learning Disabilities (Albrecht's Four Strategies)

To solve some organizational learning disabilities, like the Silo Syndrome, Albrecht has identified at least four strategies leaders can use to make their organization smarter and achieve its mission in a changing environment: “Indeed, these four key enablers ... can provide the means for moving the organization steadily toward ever higher levels of collective intelligence.”¹⁵²

1. _____.¹⁵³ These are the people willing to reach intellectually beyond the organization’s norm. He notes, “Their breadth of view, conceptual skills, and ability to see through the fog of argument and discern the few really key variables and priorities in situations makes them unusually effective in whatever jobs they are assigned.”

¹⁵⁰ Ibid., 344.

¹⁵¹ 2 Corinthians 13:5; James 5:16.

¹⁵² Ibid., 15.

¹⁵³ Ibid.

2. _____.¹⁵⁴ The combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.
3. _____.¹⁵⁵ Sometimes a difficult or intractable organizational issue requires a special “hit squad” to solve it. Many organizations use ad-hocracies: specialized and transitory teams, task forces, committees, or advocacy groups assembled to attack an objective. Ad-hocracies tend to be most effective when they are few, small, well-focused, led by competent thought leaders, and politically powerful.
4. _____.¹⁵⁶ These days, every organization of significant size or complexity needs a sophisticated and continuously evolving IT infrastructure to support the process of knowledge deployment: e-mail systems that support community building, websites, and finger-tip availability of mission-critical data, i.e. online resources and tools custom-designed to support the achievement of individual communities of interest.

¹⁵⁴ Ibid.

¹⁵⁵ Ibid., 15 – 6.

¹⁵⁶ Ibid., 16.

How Congregations Learn:



Knowledge ACQUISITION



Knowledge SHARING



Knowledge STORING



Knowledge RETRIEVING

Stages of the Learning Process - Knowledge Stewardship

Commented [A44]: Should have a page like this for the beginning of the theoretical side.

ORGANIZATIONAL LEARNING AND JOINING

KNOWLEDGE STAGES: **ACQUISITION-SHARING**

IIM Process Map

Branch Name	Duration	Start	End	Completion	
PASTOR SCHROEDER-LEE REPORT - LEARNING TO LEARN LUTHERAN CHURCH	260 days	12/9/2018	12/8/2019	46%	
• JOINING PHASE (Months 1 - 3)	66 days	12/9/2018	3/11/2019	100%	
One-on-One Interviews / Congregational Systems Inventory (CSI)	45 days	12/10/2018	2/8/2019	100%	
• Staff Professional Development	75 days	12/10/2018	3/22/2019	100%	
Form a Senior Leadership Team (SLT)	75 days	12/10/2018	3/22/2019	100%	
All Ministry Team Meetings (Quarterly Team Huddles)	70 days	12/10/2018	3/15/2019	100%	
1st Quarter Report	21 days	2/11/2019	3/11/2019	100%	
• CONGREGATIONAL SELF-STUDY PHASE (Months 4 - 9)	6 mths	3/12/2019	8/26/2019	15%	
TTF Installation	0 days	3/17/2019	3/17/2019	100%	
• TTF Training	30 days	3/19/2019	4/26/2019	0%	
TRAINING SESSION 1 - Discuss 1st Quarter Report & Charter	0 days	3/21/2019	3/21/2019	100%	
TRAINING SESSION 2 - Coming to Terms with History	0 days	3/25/2019	3/26/2019	100%	
TRAINING SESSION 3 - Church Governance	0 days	4/4/2019	4/4/2019	100%	
TRAINING SESSION 4 - Mission and Vision	0 days	4/11/2019	4/11/2019	100%	
TRAINING SESSION 5 - Cottage Meeting (CM) Roles and Responsibilities	0 days	4/18/2019	4/18/2019	100%	
TRAINING SESSION 6 - TBD	0 days	4/25/2019	4/25/2019	100%	
• TTF COTTAGE MEETING SERIES	84 days	5/1/2019	8/26/2019	30%	
MAY - TOPIC TO BE DETERMINED!	22 days	5/1/2019	5/30/2019	30%	
JUNE - TOPIC TO BE DETERMINED!	22 days	6/3/2019	7/2/2019	30%	
TTF FINAL REPORT AND RECOMMENDATIONS	45 days	7/3/2019	9/3/2019	0%	
TTF Town Hall	0 days	9/8/2019	9/8/2019	0%	
• ACTION - IMPLEMENTATION PHASE (possibly Months 10 - 11)	2 mths	9/9/2019	11/1/2019	0%	
• Voter's Meeting	0 days	9/15/2019	9/15/2019	0%	
Create an Accepted Implementation Plan (Senior Pastor & Governing Board)	10 days	9/18/2019	9/27/2019	0%	
Communicate and Create Ownership	5 days	9/30/2019	10/4/2019	0%	
• Launch Project Improvement Teams	0 days	9/9/2019	9/9/2019	0%	
Analyze the implementation setting, that is, the climate for change.	0 days	9/9/2019	9/9/2019	0%	
Effectiveness of Change	0 days	9/9/2019	9/9/2019	0%	
Impact effort matrix	0 days	9/9/2019	9/9/2019	0%	
Force Field Analysis	0 days	9/9/2019	9/9/2019	0%	
Decide how to organize the implementation effort.	0 days	9/9/2019	9/9/2019	0%	
Develop an implementation plan covering activities, responsibilities, deadlines, and so on, and have it accepted.	0 days	9/9/2019	9/9/2019	0%	
Communicate with and create ownership of changes by those affected by them and by those who will implement them.	0 days	9/9/2019	9/9/2019	0%	
Implement the ministry solution.	0 days	9/9/2019	9/9/2019	0%	
• DEPARTURE PHASE (Month 12)	5 wks	11/4/2019	12/8/2019	0%	
• Assess the Ministry Effects	25 days	11/4/2019	12/6/2019	0%	
Senior Pastor Departure	25 days	11/4/2019	12/6/2019	0%	
Review Congregational Vote	25 days	11/4/2019	12/6/2019	0%	
• Ministry Safeguards	25 days	11/4/2019	12/6/2019	0%	
Senior Leadership Team (SLT) Succession Plan	25 days	11/4/2019	12/6/2019	0%	
Behavioral Covenants (3)	25 days	11/4/2019	12/6/2019	0%	
Shepherding Flocks Ministry (Board of Elders)	25 days	11/4/2019	12/6/2019	0%	
Review Assign Approved Recommendations to BOD or Staff	25 days	11/4/2019	12/6/2019	0%	
Report and Close	25 days	11/4/2019	12/6/2019	0%	

Commented [A45]: The Intentional Interim Ministry Process Map has a variety of purposes:

1. Functions as both a "Dashboard" and "Road Map."
2. Offers stability and safety (integrity) to the process.
3. Provide clarity and focus.
4. Frames the IIP's Role.
5. Frames the Staff's Role.
6. Frames the Board's Role.
7. Frames the TTF's Role.
8. Defines the Congregation's Role.
9. Promotes Purposeful Learning.
10. Provides means to track and report.

The IIM Process Map is used when interviewing with the Call Committee to provide a general overview of how the IIM might be conducted.

Once the Divine Call is received and accepted, the IIM Process Map is published (shared-stored) widely. It becomes the primary component of the pastor reports, and the item the lay leaders most reference and check the status.

ROUTINE OPERATION.

One-on-One Interview Questions

(ADAPTED FROM NALIP MANUAL)

(Instructions: I am encouraging every member, or friend, of the congregation who schedules a meeting with me to please complete this interview tool. Not only will it help inform our meeting it will provide me a reference point for reporting to the congregation various themes and patterns which emerge from within the congregation.)

Commented [A46]: Once called, I request the church secretary place the one-on-one sign-up sheets in the church narthex and make available several pickups to prepare for the meeting: 1) the one-on-one sheets, 2) emotional thermostat, and 3) organizational chart.

1. What do you see as the three major concerns your congregation has during this pastoral transition?

- a.
- b.
- c.

Commented [A47]: The church members bring the completed answers with them to the meeting. I collect these sheets and use the data to identify both qualitative and quantitative data (i.e. themes, patterns, narratives, concerns, etc.) for use in the 1st Quarter Report. The identities and content remain private and confidential.

- 2. What would you like to see accomplished during the next six months?
- 3. What steps are necessary to take in order to meet any or all these goals?
- 4. What do you see as some of the strengths of your congregation?
- 5. In what areas does your congregation need to make improvements or do better?
- 6. In what specific ways do you want the interim pastor to support you during this transitional period?

7. What are some specific ways you intend to support the interim pastor?
8. What are your feelings about the future of this congregation?
9. What are some of the attitudes expressed by the members about the congregation's life and mission?
10. Name any trends you have seen occur since your former pastor left?
11. What is your involvement in this congregation? (Past and present)
12. Are there any other concerns/issues you would like to mention here?

Monday, December 10 th	Tuesday, December 11 th	Wednesday, December 12 th
8:30am – 9:30am _____	8:30am – 9:30am _____	8:30am – 9:30am _____
9:45am – 10:45am _____	9:45am – 10:45am _____	9:45am – 10:45am _____
11:00pm – 12:00pm _____	11:00pm – 12:00pm _____	11:00pm – 12:00pm _____
12:15pm – 1:15pm _____	Shut-In & Visitor Visits (12noon to 4:00pm)	12:15pm – 1:15pm _____
1:30pm – 2:30pm _____		1:30pm – 2:30pm _____
2:45pm – 3:45pm _____		2:45pm – 3:45pm _____

One-on-One Meeting with Pastor Lee

Week 1 & 2

Thursday, December 13 th	Saturday, December 15 th	Sunday, December 16 th
8:30am – 9:30am _____	8:30am – 9:30am _____	12 noon – 1:30pm _____
9:45am – 10:45am _____	9:45am – 10:45am _____	1:45pm – 2:45pm _____
11:00pm – 12:00pm _____	11:00pm – 12:00pm _____	3:00pm – 4:00pm _____
12:15pm – 1:15pm _____	Shut-In & Visitor Visits (12noon to 4:00pm)	
1:30pm – 2:30pm _____		
2:45pm – 3:45pm _____		

Please select a date / time that suits and fill in your name (individual, family, or couple). Please print clearly. Also, please take a questionnaire provided to PREPARE for our meeting. All meetings are private and confidential. I'm looking forward to meeting you all and sharing with you what you may expect in the months ahead...Thanks! In Christ who loves us so much, Pastor Lee.

Commented [A48]: Typically, two-thirds of the average weekly attendees sign up. I set aside the first two months for the one-on-one meetings. I use the third month to write the 1st Quarter Report.

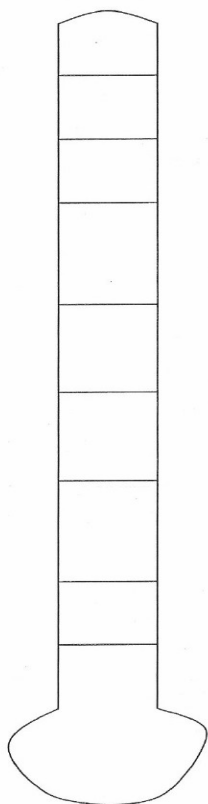
The meeting accomplishes several objectives:

1. Meet many members quickly.
2. Personal/private concerns surface and care ministry results.
3. Serves as an emotional release valve.
4. Identify possible TTF candidates.
5. Members share their hopes, goals, dreams, and wishes.
6. Begin to "frame" IIM Process and "manage" expectations.
7. Member learning begins: exposure to key IIM terms, theories and objectives.

ROUTINE OPERATION

Emotional Thermostat

HOW ARE YOU DOING NOW?



Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.

Very distressed; I'll have to wait and see.

Feel very distressed: am participating in this process to help myself and our congregation with the healing that needs to be done.

Am moderately distressed about events at our church, yet.....

Am still somewhat upset, need healing time, but will continue to participate.

Am okay, but will need time with new leadership.

Am okay about things, and look forward to new leadership and mission.

Doing quite well, thank you, and looking with excitement to our future mission.

COMMENTS

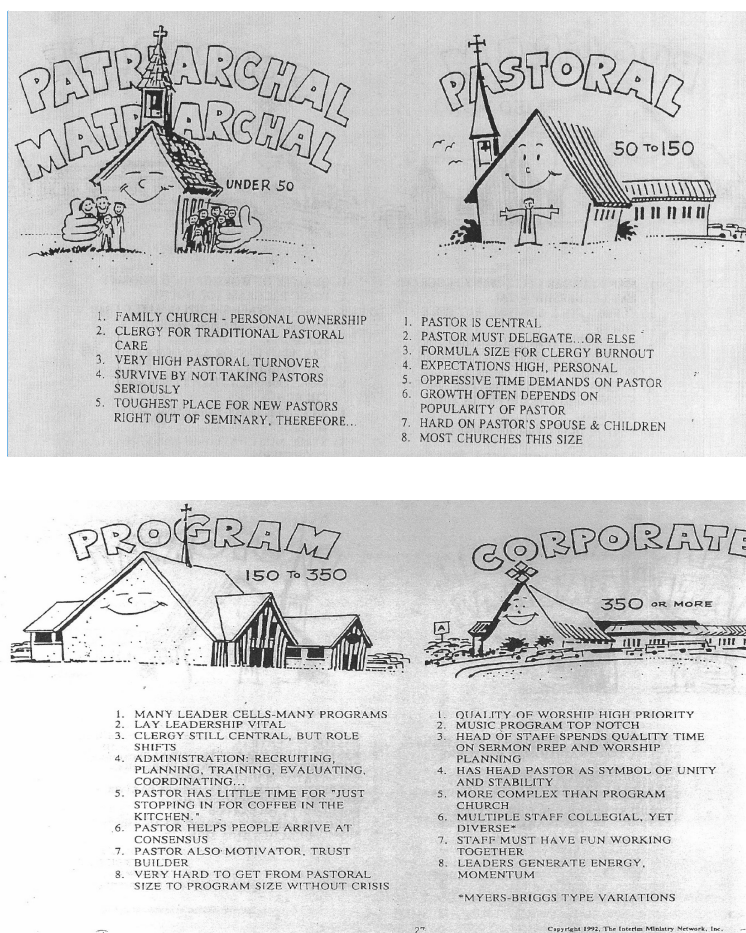
Commented [A49]:

Purpose and Use:

- Promote Psychological safety.
- Members receive prior to arrival.
- Publish anonymously for socializing the general congregation's emotional pulse.

INNOVATION OPERATION.

Congregational Size Theory



Commented [A50]: I provide during the one-on-one meetings.

Most suggest they never knew such a theory existed, but it makes a lot of sense. Members seem to appreciate the learning and the IIP is viewed as bring useful resources.

Commented [A51]: Size categories offers interesting insights on the changing role of the pastor.

Beyond the comments already provided on these sheets I explain that some pastors are fluid and can move comfortably up and down congregational sizes, while others are specially situated for a particular congregation size and culture.

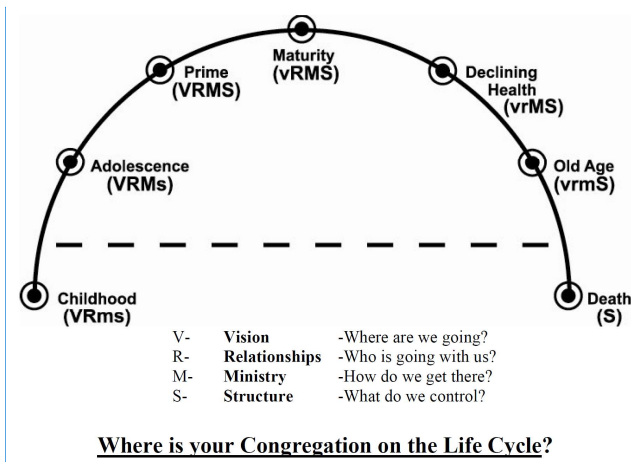
It is helpful to point out that while a congregation may see themselves as wanting to be a "larger" size church they may behave more like a family-sized church.

It may be the pastor and congregation are not in alignment with one another and a simple review of size theory may assist in identifying the incongruencies (i.e. job descriptions, staffing configuration, governance model, etc.).

INNOVATION OPERATION.

Congregational Life Cycle Theory

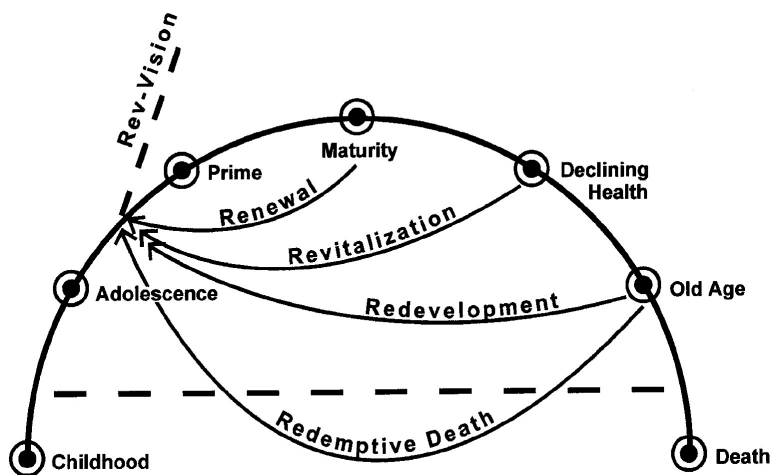
REV. DR. TIM ROGERS-MARTIN



Commented [A52]: Share during the one-on-one meetings.

Commented [A53]: I will ask questions like:

1. Where do you see your church today on the life cycle?
2. Where do you see yourself?
3. Where do you see your departed pastor?
4. Where do you see the elders?
5. Where do you see the worship team?
6. Where do you see the youth leaders?
7. Where do you see the school ministry?



Commented [A54]: It will be important for Learning to Learn to identify which life cycle stage it identifies with the most. Doing so will assist the congregation in aligning realistic goals for staffing, vision-casting, and stewarding the congregation's resources.

For instance, if the congregation determines it is in the "adolescent" stage then you may be served well by a pastor whose leadership style is mature and who is able to "speak order into chaos." If the congregation is in its infancy stage, then a pastor whose leadership style is patient and hands-on, setting an example, might be useful. However, if the congregation is in its prime, it may need a pastor who can keep up and be an excellent collaborator and team player; able to resource ideas but let others run with them. Finally, if your congregation finds itself in the "old age" stage, it may need a "chaplain" type pastor who has wonderful bedside manner and can assist certain ministries to die with dignity so new ministries may be birthed; or staff who can transition or repurpose their skills

INNOVATION OPERATION.

The Organizational Flow Chart

PLEASE DRAW Organizational Stewardship & Practice

(Instructions: In the space below please draw a picture of how the **decision-making** process during your most recent pastor's ministry got done. Simply put, "How do things get done around here?" Be specific. Who reports to who? Use boxes, lines, and arrows. Please include names of boards, committees, and staff – pastors, principal, teachers, and secretaries. Please include your name any leadership team(s) you serve on. **PLEASE RETURN TO PASTOR SCHROEDER-LEE – THANKYOU!**)

Commented [A55]: Share during the one-on-one meeting.

Commented [A56]: Publish with permission to begin the learning process through knowledge acquisition and sharing.

Also, this document provides the IIP with much information on where and why conflicts may be occurring. It provides a "road map" of sorts as to how things get done!

ROUTINE OPERATION.

Chafin-Schutz Inventory

Chafin-Schutz Inventory

Determining Congregational Readiness to Begin the Search for the Call of the Next Pastor

The tables below correspond *approximately* to the lists of symptoms for non-resolution and resolution in Part 4, Tool 3 "Engaging the Developmental Tasks" of *Temporary Shepherds: A Congregational Handbook for Interim Ministry* by R. Neil Chafin. It was placed in this inventory format by Carol Schultz. For each paired item in the tables, check the box corresponding to your assessment of the congregation's current status. Level 1 or 2 indicates a need for special attention. Level 4 or 5 indicates readiness to move forward.

I. COMING TO TERMS WITH HISTORY – characterized by the following issues and actions.

Putting the tenure of the previous pastor in perspective.
Acknowledging the past and accepting the good and the bad.
Deciding what is important and worthwhile to carry into the future. Appropriately venting feelings, grieving, accepting, and moving on.

Symptoms of Non-resolution	1	2	3	4	5	Indications of Resolution
Dwelling on past		X				Living in present; accepting past
Stuck in grief, anger, denial, guilt, alienation		X				Movement through grief process; closure with previous pastor
Declining membership, giving, participation		X				Stabilizing membership, giving, participation
Unwillingness to consider "why" of conflict and decision-making process			X			Open to change; ready to try new ideas
Ghost(s) of previous pastor(s) and leadership block openness			X			Asking questions: Where are we going? What do we do now?
Trying to clone previous pastor or find his opposite			X			Investment in current and future issues; new mission statement
Lack of humor				X		Healthy humor

SCORE: 1.86

II. DISCOVERING A NEW IDENTITY – characterized by the following issues and actions.

Determining whether the congregation's image of itself is realistic. Seeing the interim time as an opportunity for renewal and growth. Separating the congregation's identity from the previous pastor's personality and style.

Symptoms of Non-resolution	1	2	3	4	5	Indications of Resolution
Focus on past			X			Focus on present or future
Resistance to doing self-study			X			Willingness to do self-assessment
Emphasis on blaming; negative criticizing; low trust; lack of sharing		X				What happens next? How can we help? Spirit of inclusiveness and outreach
Identity confusion: Who are we? Where are we going? How will we get there?		X				Congregation faces reality; affirms true identity; has a sense of direction

Commented [A57]: At this point, I will have met over fifty people and will have begun developing a picture of the congregation's health. Throughout the Intentional Interim Ministry (IIM) process my job is to assume a research posture, engaging in conversations from all points of view, especially during the joining phase (months 1 – 3). A research posture will be helpful to recruit everyone's best thinking and to encourage collaboration and learning. That said, I invite congregational members to a "night out" with me: **"You are cordially invited to attend a townhall on January 15 at 6:30pm to 8:30pm. I will be the host. The meeting will be structured around the Chafin-Schutz Inventory, a congregational health assessment tool. Based on my one-on-one interviews, I completed the inventory and have 'scored' the congregation's current health status while in transition. The inventory identifies which IIM developmental tasks may need special attention to repair from the past, restore trust, and prepare for the future. In a segment I call 'Tell It to Pastor Schroeder-Lee' the attendees will have an opportunity, with ground-rules, to AFFIRM or IMPROVE my current assessment of the congregation's health during this time of transition." Based on the scores of the Chafin-Schutz Inventory, it is my assessment that the congregation is to be commended for slowing down the Call process for a new pastor to allow for internal congregation healing, growth, and direction-finding."**

INNOVATIVE OPERATION

ORGANIZATIONAL LEARNING AND REPORTING

KNOWLEDGE STAGES: **ACQUISITION-SHARING-STORING**

REPORTING GOALS: (STEWARDING KNOWLEDGE)

1. RECOGNIZE CONGREGATIONAL ACCOMPLISHMENTS
2. SHOW STAFF APPRECIATION
3. DOCUMENT PROGRESS AND HISTORY
4. PROVIDE LEADERSHIP

Commented [A58]:
ROUTINE-COMPLEX-INNOVATION
OPERATIONS.



Commented [A59]: Examples: Crystal Grenade Award, Get Well Plan, Vacation Time-Days Off Policy, One Word accolade, etc.

30-Day Report

Call Readiness Report

Monitoring Reports

Commented [A60]: I use this as an early “reporting out” document to begin framing and formalizing the process; also, to address any initial concerns.

Commented [A61]: I use this as circular communication giving the members an opportunity to “affirm” or “improve” where they are collectively.

Commented [A62]: These are the regular pastor reports. In a policy governance model, specific senior pastor limitation policies are reviewed according to an annual “Policy Review Calendar.”

IIP'S 1st Quarter Report

(HANDOUT – REQUEST VIA EMAIL)

1st Quarter Report Intentional Interim Ministry (IIM)

JUNE 18, 2019

"Instead, speaking the truth in love, we will grow to become in every respect the mature body of him who is the head, that is, Christ." (Ephesians 4:15)

Learning to Learn Lutheran Church, VDU, CA

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1234 Knowledge Avenue
Learning to Learn Lutheran Church
Amazing Teams, CA 95789

Email
martin@churchorganizers.org

Commented [A63]: My objective in preparing the 1st Quarter Report is to be a faithful lens, describing the church as it is seen by the members – the themes and narratives that are important to them. The 1st Quarter Report is intended to be a primary resource for the members and stakeholders of Learning to Learn Lutheran Church, and the district of the LC—MS, in the congregational self-study (e.g. IIM Phase Two). In fact, it is now a **historic document** of the church. The congregation and leaders have a unique and divine opportunity to review, affirm and/or recreate ministry goals and ministry processes while the system is “unfrozen” (e.g. between settled pastors). Redeem the time, as King Solomon puts it, “There is a time for everything, and a season for every activity under heaven...” (Ecclesiastes 3:1).

The Pareto Chart below illustrates how addressing the congregation's top 3 concerns has the effect of addressing 58.1% of the congregation's concerns, as shown by the orange line: 29.1% of the congregation's concerns by addressing membership, 44.2% of the congregation's concerns by addressing membership and leadership, and 58.1% of the congregation's concerns by addressing membership, leadership, and the pastor. This prioritization helps to focus the congregational self-study on the top 3 to 5 of Ascension's member concerns.¹²

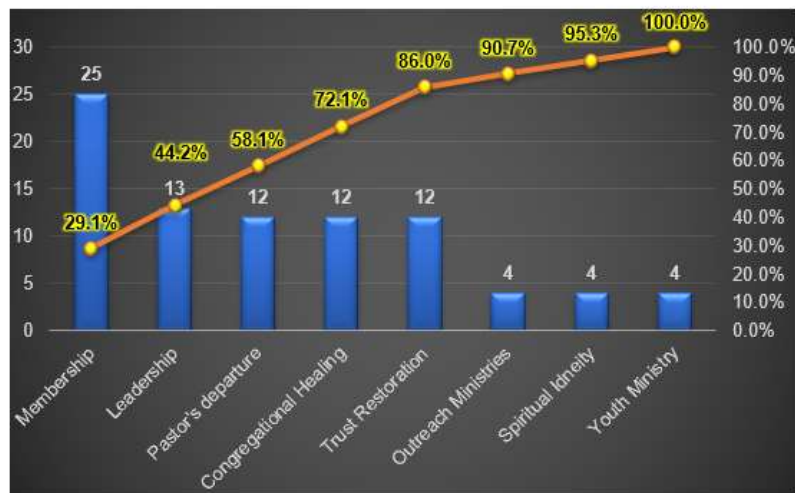


Figure 6

With the guidance of the Transition Task Force, the congregation may choose to study any 3 to 5 topics, or any different grouping of the above 3 to 5 topics. I recommend the congregational self-study focus on the following topics:

Commented [A64]: Change "Ascension" to "Learning to Learn."

Commented [A65]: I make recommendations for the congregational self-study focus areas based on the member's feedback and ranking of concerns.

COMPLEX OPERATION.

- ☛ 1. **Come to Terms with your History:** The pastor's departure and related membership fallout; other member characteristics.
- ☛ 2. **Choose a Church Governance Model to Fit:** Healthy congregations develop clearly defined leadership roles and boundaries.
- ☛ 3. **Rediscover Your Star:** Having this clear sense of vision will aid in embracing a path forward.

Commented [A66]: The TTF's task will be to address these congregational concerns.

COMPLEX-INNOVATION OPERATIONS

IIP's Senior Pastor Annual Report

(HANDOUT REQUEST VIA EMAIL)

Senior Pastor Annual Report 2018

"See, I am doing a new thing! Now it springs up; do you not perceive it? I am making a way in the wilderness and streams in the wasteland." (Isaiah 43:19, NIV).

St. John's Lutheran Church

Tel 989.224.6796
Fax Telephone

511 East Sturgis Street
St. John's, Michigan 48879

www.stjohnslutheranchurchmi.org
martin@churchorganizers.org

Commented [A67]: Change "St. John's Lutheran Church" to "Learning to Learn Lutheran Church" and the address to VDU California.

Commented [A68]: This Report's objective is to:

1. Show compliance with Governing documents.
2. Show I am "behaving" myself.
3. Adapt to whatever governance model is being used.
4. Clarify pastoral roles and expectations.
5. Restore trust where needed.
6. Create space for the new pastor.
7. Leave breadcrumbs for the new pastor.

ROUTINE-COMPLEX OPERATIONS

ORGANIZATIONAL LEARNING AND TEAMING

KNOWLEDGE STAGES: **ACQUISITION-SHARING-STORING-
RETRIEVING**

Commented [A69]: Remember Amy Edmondson's Multiple Team Membership (MTM).

The IIP has the opportunity to transcend team boundaries, however, the IIP must be clear about their functioning position.

Teaming with the SENIOR LEADERSHIP TEAM (SLT)

Staff Meetings and Agenda Process

Office Staff Meeting

Date | Time 5/13/2019 3:00 PM | Location Pastor's Office

Meeting called by	Church Office Staff	Attendees: Barb Marcellus, Vanessa Candreva and Pastor Lee
Type of meeting	Regular Monthly	Visitors: N/A
Facilitator	Pastor Lee	Please Read: N/A
Note taker		PLEASE BRING: 3 Names to use for Member Feedback
Observers		

Agenda

Devotion: Vanessa

NOTES

- I. Old Ministry Projects (5 – 7 minutes)
 - 1) Review Staff Evaluation Timeline & Reviews
 - 2) VBS
 - 3) TTF & Cottage Meetings
- II. New Ministry Project (20 – 25 minutes)
 - 1) Elders & Visitation
 - 2)
- III. Nice-to-Knows & Parking Lot
 - 1)

Other Information

Action Items/By:

Pastor Lee -

Barb - |

Vanessa -

Devotions on _____ - _____ (Thank you!)

Commented [A70]: I recommend forming a senior leadership team right away. In large staffs it may not have been the custom to meet weekly or rely on each other's mutual input for learning and decision-making. This is an excellent opportunity to do so. Many of the IIM concepts and developmental tasks begin to find traction within these pockets of leadership. Even in a small parish, with only a secretary and musician, I recommend establishing a senior leadership team for the same reasons.

These meetings allow the IIP to invest in both the spiritual and professional care of these leaders. It also begins to define the accountability structure, while also promoting all of the stages of the learning process.

I use a standard agenda format to provide for a safe environment (predictable) and invite everyone to help set the agenda and have a role in the meeting.

I also keep each week's agenda, with my notes, in a staff notebook which I leave behind for the new pastor – to promote knowledge sharing and model knowledge storing to the staff.

COMPLEX OPERATION

Commented [A71]: Ideally, replace the names i.e. Sue Smart and Ellie Effort.

Commented [A72]: Other useful staff "governing" documents may be behavioral covenants, code of conducts, and the traditional employee policy manual.

During my interview with the Call Committee I always ask who reports to me and who I report to. I then follow up by asking for the most recent job description of each person that reports to the senior pastor. I also ask if the annual performance evaluations are being done and can be found in each employee's personnel file.

Job Descriptions and development process and Annual Performance Evaluation



Associate Pastor – Job Description (developed from a Brown University template)

Major Responsibility: Ministry Teams (Supervision)

Supporting Actions: Hire, delegate and supervise the support staff. Work with staff to develop goals and job descriptions. Complete periodic performance evaluations. Assign specific tasks that fulfill the mission of the church, and follow-up as to progress being made. Provide for ongoing training and leadership development within the staff meetings and other training outside of the organization, as desired. Effectively communicate new policies and procedures to the staff.

Desired Outcomes: Staff is professional, motivated, productive, and Christ-centered in approach. Work is well-organized, and staff is well informed. Staff has a clear understanding of the mission and vision of the congregation, as well as a clear understanding of what is expected.



Commented [A73]: Limiting major responsibilities to between 3 to 5 is recommended. Most other duties/responsibilities can be placed under the umbrella of a major responsibility. There are many good reasons for this approach.

Notice:

1. The job description is focused on the end deliverable.
2. The job description links each major category of responsibility to a percent of the employee's time. Very important to managing expectations and communicating priorities.
3. I provide the employee the template, maybe samples of other church workers. They develop the first draft.

ROUTINE-COMPLEX OPERATIONS

Essential Function? Yes, No Percentage: 15%

Major Responsibility: Ministry Area 1 – Finding Members

Supporting Actions: Review weekly report of visitors. Meet weekly with Coordinator of Outreach to review follow-up strategy. Follow-up with phone call, note, or home visit, as desired or required.

Desired Outcomes: The congregation members, school community, and staff make outreach to the not-yet-believer a priority and way of life. Everyone is actively reaching out to others with the Gospel of Christ. Visitors are recognized during and after initial contact. New mission starts are actively pursued in other areas of the geographic area. Finding members includes using internet-based outreach opportunities, with follow-up.

Essential Function? Yes, ☐ No ☒ Percentage: 10%

Major Responsibility: Ministry Area 2 – Keeping Members

Supporting Actions: Review weekly attendance report for contacts needed; sort and mark report for Brother's Keeper Team follow-up; work with Pastoral Care Ministry to establish policy for seriously delinquent

Desired Outcomes: Worship attendance of members is carefully tracked. Members, who are absent from worship four times or more, are contacted by the Brother's Keeper team. Follow-up by other means are made on a regular basis to encourage return to active worship (i.e. email, direct mail, phone invitation). Long-term inactive members are referred to the Pastoral Care Ministry for further follow-up and final decision of their membership status. Ultimate desire is to keep them as members!

Essential Function? Yes, ☐ No ☒ Percentage: 10%

Major Responsibility: Ministry Area 3 – Celebrating with People (Worship Service Planning)

Organizational Stewardship & Practice

Supporting Actions: Establish a plan for worship service planning; review draft and final service folders for accuracy; sermon preparation, as scheduled; plan for celebrations, family baptisms, confirmations, new member reception, teacher dedications, staff recognitions, etc.

Desired Outcomes: Worship services are uplifting, applicable to life situations for people of all ages and situations. The law is clearly communicated, and people leave worship having heard the Gospel message of Jesus Christ (thus seeing Jesus). People feel part of the community, and their presence is celebrated through the milestones of life. People know that they matter, and they look forward to being in worship with their brothers and sisters in Christ.

Essential Function? Yes, ☒ No ☐ Percentage: 20%

Major Responsibility: Ministry Area 4 – Education and Adult Ministry (Adult Ministry)

Supporting Actions: New Member Class; Adult Bible Study planning, delegation, and scheduling; Bible study preparation

Desired Outcomes: All members are growing to maturity of their faith and in service. Education offerings for adults run the gamut from the new members' class to disciple-making programs and leadership development. Spiritual gifts inventories are taken, and people have an opportunity to serve using their gifts and talents.

Essential Function? Yes, ☒ No ☐ Percentage: 15%

Major Responsibility: Ministry Area 5 – Church Programs (Incl. Youth/Children Ministry)

Supporting Actions: Recruit for Sunday School and Vacation Bible School ministries; support ongoing and new ministries and programs for the congregation

Desired Outcomes: All ministries and programs of the congregation are accounted for, and the contact person has someone from the staff to whom to connect for support. New programs are actively developed to meet the needs of people where they are and to give them opportunities to serve others with the love of God. Children and youth have education opportunities to help them in their spiritual development. Families have the tools they need for life.

Essential Function? Yes, ☒ No ☐ Percentage: 5%

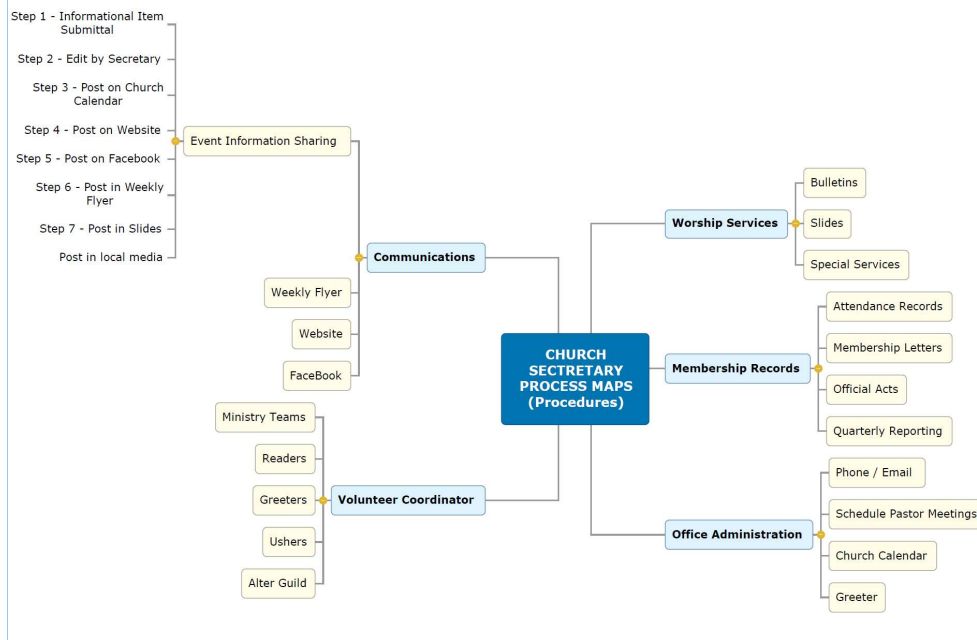
Major Responsibility: Ministry Area 6 – Caring for People and Families

Supporting Actions: Coordination of and meeting with families and couples for baptisms, weddings, and funerals. Regular meetings with Stephen Ministry leaders, as well as giving support to the ministry, as needed. Coordination of visitation with Outreach Ministry and lay communion teams.

Desired Outcomes: Members are cared for in the changes that come to families. Parents understand the nature of baptism and raise their children within the church. Couples have tools to help them in their marriages. Those who are mourning are comforted with the hope of eternal life in Christ. Those who are unable to commune at church have opportunities to do so in their own homes through the visitation ministries.

Essential Function? Yes, ☒ No ☐ Percentage: 25%

Job Description — Process Mapping



Commented [A74]: Mapping an employee's job description provides a simple visual aid to get a "lay-of-the-land" perspective. It helps the employee see how every task fits in to the overall duties and responsibilities.

It also provides volunteers an easy way to know how they might be of assistance.

It is a way of knowledge sharing and storing.

ROUTINE OPERATION

Edward Deming, renown American engineer, professor, and statistician is reported to have said often, "If you can't describe what you are doing as a process, you don't know what you are doing."

Commented [A75]: Question: If most church positions don't even have job descriptions, is mapping asking too much? These IIM pastors are not going to have mapping software. Shouldn't they just worry about getting the job descriptions moved from tacit to explicit knowledge (providing that is necessary)?

Annual Performance Evaluation Process

June 18, 2019

RE: THE ANNUAL EMPLOYEE EVALUATION PROCESS

Dear Staff Member,

Soon I will prepare a performance review document for each of you. This is a **standard practice** in our churches and schools and is a helpful way to encourage and improve communication and accountability

Commented [A76]: Plan ahead several months.

Commented [A77]: Review the policy manual or employee handbook to confirm the evaluation process is in compliance.

in our community. As your immediate supervisor it is my privilege to write a review for you. In some cases, I will request assistance from others who provide oversight to the position you serve in. Once the review is written, we will sit down together and go over last year's work.

To start this process off, would you please provide the church secretary names of 3 people, with whom you interact most? Examples could include co-workers, board members, or people involved in programs that you lead (or parents of the students). The church office will contact them to request that they complete a confidential "Employee Feedback Form" regarding their experience with you. I have included a sample copy of the feedback form. In addition to the people you select, I may choose several other persons to get their feedback, as well.

I am aiming for the following timeline:

1. Please send the names of 3 people from whom you will seek feedback to the church secretary by **July 8, 2019**.
2. I will send the secretary names of any additional people I wish to contact by **Friday, July 12, 2019**.
3. The secretary will send the feedback document to the "chosen" people by **Friday, July 19, 2019**.
4. I will ask to have the feedback forms returned to the secretary by **Monday, July 29, 2019**. People can complete the documents electronically or manually. This feedback information will be kept private and confidential.
5. I am also asking you to complete the attached self-assessment form, so that I can better understand how you saw your performance and where you would like to focus next year. Please have these forms back to be by **Friday, August 9, 2019**.
6. I will prepare and deliver your annual review to Vanessa on **Monday, August 19, 2019** and Barb on **Tuesday, August 20, 2019**.

Thank you for all you do to build up the Lord's Kingdom in Christ!

Pastor Schroeder-Lee

Commented [A78]: The process includes:

1. Self-evaluation
2. Member Evaluation
3. Supervisor Evaluation
4. Job Description Review and Update
5. Professional Development Plan

Notebooks – Ministry, Staff, Governance, Finance, TTF, etc.

Knowledge Storing and Knowledge Retrieval Systems:

1. Notebooks
2. Website
3. DropBox
4. Microsoft OneDrive
5. Google Drive

Commented [A79]: The “Notebooks” tend to be the most visual reminder to the staff and lay leaders of the importance to store knowledge that it may become usable in the future by others. This is one of the best ways I “signal” to everyone I am daily preparing to handoff ministry to the next pastor. All should be thinking in a similar manner, especially lay leaders.

Teaming with the TRANSITION TASK FORCE (TTF)

Selection

Training

- Training Schedule and Reference Sources
- Cottage Meeting Facilitation Process (including R. Short's Learning Wheel)
- Process Observer Evaluation Sheet
- Developing the Research Questions

Installation

Deployment

Final Report & Recommendations

Recognition

TTF TRAINING SCHEDULE AND REFERENCE SOURCES

WEEK 1 – TTF Orientation

Devotion – Joining Theme: _____

Roles & Responsibilities: A) Facilitator; B) Host; C) Timekeeper; and D) Process Observer

1st Quarter Report Reaction and Review

Assignment: Review Systems Thinking and Organizational Learning Source Packet

WEEK 2 – Systems Theory Concepts & Adaptive Leadership

Devotion – Reflective Learning Theme: _____

Anxiety and Reactivity, Burden-shifting; Separateness and Closeness; Emotional Triangles; Redefining

Adaptive Challenges and Technical Problems

TTF Code of Conduct

Commented [A80]:

FRAMING:

1. Leader's Role
2. Member's Role
3. Project's Purpose

WEEK 3 – Governing Documents Review

Devotion – Framing to Learn: _____

Organizational structure: who reports to who

Coming to Terms with History & Preparing for the Future

Church Governance issues

Healthy versus Unhealthy Conflict

Week 4 – Cottage Meeting & TTF Leadership

Devotion – Teaming to Learn: _____

Cottage Meeting Facilitation Process: A) Bible Study & Learning Module; B) Lay-leadership Sponsorship Bridge; and C) Agreed on Timeline

Developing Your Team's Research Question

TTF Leadership: A) Divide into 3 Teams; B) Select Chairperson; and C) Select Team Member Roles

COTTAGE MEETING FACILITATION PROCESS

ROLES, RULES, AND EXPECTATIONS

FACILITATOR (Participant/Observer)

The facilitator has the responsibility of guiding the *learning group* through the cottage meeting series. This is done through using the group's planned *Bible Study* and *Learning Module*. While the design of the process is given, the context can be managed. The facilitator is the conductor as well as a participant. He/she is also responsible for *apprehending*, *diagnosing*, and *intervening* as appropriate and necessary. While the group is in operation your activities and skills are necessary to monitor and correct the group when it is blocked.

TIMEKEEPER

For the group to accomplish their goal of successfully completing the Bible study and learning module, the role of the timekeeper is significant. The timekeeper keeps watch on the allotted time for each section of the cottage meeting as well as participates in the process.

PROCESS OBSERVER

The role of process observer is to work at developing personal skills of *apprehending* and *diagnosing* while at the same time participating in the *reflection* process. The process observer uses the provided **process observer sheet** to record the *learning group's* interactions. The process observer's report will be shared at the appropriate time.

HOSPITALITY PERSON

Many people mistakenly think that successful leadership means managing the meeting. Often, success is more dependent upon what happens before, surrounding and after a meeting. It would be difficult to overestimate the importance of this activity. It could even be said that, "If the context is wrong, you cannot win. If right, you cannot lose." The preparation put into a cottage meeting before, during, and after is significant (i.e. announcement, promotion, signup sheets, room setup, greeting, etc.).

Commented [A81]: Where is this quote from?

FISH-BOWL ACTIVITY

The Fish-Bowl Activity invites TTF group members who are not leading the cottage meeting to grow in understanding their cottage meeting series through a reflection process. Any TTF member can be an active participant in *apprehending* and *diagnosing* what is going on as they observe other cottage meetings in process. A Fishbowl report should occur after the first cottage meeting completed in each series.

LEADERSHIP ACTIVITIES

- I. **THE BIBLE STUDY:** The Bible study should provide the practical theology component necessary to understand God's activity in everything – God's providence (1st Article stuff). Please choose a Bible study from the six options available in the "Temporary Shepherds," by Roger S. Nicholson (pgs. 146 – 164). You can "import" Scripture and other resources to the study.
- II. **THE LEARNING MODULE:** In education, the term "module" refers to an instructional unit that focuses on a topic. Most educational modules include information about the topic, focus on student-centered learning activities and culminate in a project for students to demonstrate understanding (e.g. "final report").
 - Learning modules generally begin with a research/theological question to focus the group's thinking, such as, "How does church governance influence a church and school staff?" or "How does church size affect community building?" or "How does stewardship relate to the

Commented [A82]: "Temporary Shepherds: A Congregational Handbook for Interim Ministry," (Roger Nicholson).

congregational life cycle?” or “What are short and long term core issues facing our congregation, staffing, and stewardship?” The group then gains basic information through reading or videos followed by exploratory activities, such as table discussions, break-out groups, or role playing that help them learn concepts involved.

- During this section please identify and apply, as appropriate, one or two of the CSI dimensions relevant to your cottage meeting theme.

III. THE LEADERSHIP LEARNING WHEEL, R. Short

1. MANAGING the CONTEXT of the Cottage Meeting – Leadership Questions

- What are the basic goals of the system?
- What context is necessary to achieve them?

2. DESIGNING the Cottage Meeting – Leadership Questions

- What are the goals of the group or meeting?
- What are the best activities to achieve them?
- In what sequence should the goals and activities be addressed?

3. CONDUCTING the Cottage Meeting – Leadership Questions

- Are we meeting both short- and long-term goals?
- To what degree is the achievement of the task goals dependent upon the group members?
- Who needs to decide what?
- How am I, as a leader, realistically dependent upon the members?
- How realistically dependent upon me are they?

4. PARTICIPATING in the Cottage Meeting – Leadership Questions

- What mechanisms can I use to get wide participation?
- How can I increase the responsibility of the participants?

5. APPREHENDING in the Cottage Meeting – Leadership Questions

- How aware of myself am I when I lead?
- How do I typically manage anxiety?

- What sensory modalities, including auditory, visual, and kinesthetic, come naturally, and which do I need to develop?
- What information retrieval mechanisms can I use to ensure the group is on track?

6. DIAGNOSING (understanding) during a Cottage Meeting – Leadership Questions

- Is the problem in the context, the design, or in how it is conducted?
- Is it in the participation?
- What are the dysfunctional systemic patterns?
- Where is the most critical issue; that if changed, will modify the group?
- What are some mechanisms I can use to have others share in the diagnosis?

RESEARCH QUESTION

Quantitative Research Questions

THREE RULES for Quantitative Research Questions

1. They Begin with “How”, “What”, or “Why” and can NEVER be answered by a simple Yes or No
2. Specify the independent and dependent variables
3. IF your questions deal with connections among multiple variables, you will again - use relate or compare – just as you did in the purpose statement

General Descriptive Examples [using rules 1 and 2]:

What factors positively impact employee turnover rates of hourly workers?

Why do Asian-American students outscore other student groups on AP Calculus Exams?

Commented [A83]: The research question helps focus the need for the congregational study. It also provides “framing” for cottage meeting attendees. The attendees see and understand the “project’s purpose.”

Qualitative Research Questions

Guidelines

1. Ask only a few general questions [no Yes/No questions] to permit participants to share information with you
2. Ask questions that are neutral exploratory language that does not convey conclusions you expect
3. Design and write 2 question types: Central Questions and Sub-Questions
4. Questions often change between the Concept Paper and Proposal Stage... This is a “living” document.

Central Question Guidelines

1. Begin with “How” or “What”. **Avoid “Why”** [this is a quantitative term that implies cause and effect]
 2. List the central phenomenon you plan to explore
 3. Identify the participants and research site
-

Qualitative Central Question Script:

What is (the central phenomenon) of/for (participants) at/in (research site)?

Qualitative Examples:

What is the role of store managers in employee satisfaction of hourly workers at Staples?

What is the process of the curriculum committee in making decisions about courses?

How does a President’s leadership style impact employee engagement at Saint Leo’s University?

How will establishing a community advisory committee impact giving by senior citizens in Orlando, Florida?

How will CAI impact the reading achievement of at-risk third grade students at six elementary schools in Las Vegas, Nevada?

PROCESS OBSERVER EVALUATION SHEET

How did “context” help/hinder/enhance the Cottage Meeting?

a) Good _____ Explain: _____

b) OK _____ Explain: _____

c) Needs Work _____ Explain: _____

Commented [A84]: Each sub-team of the TTF will assign one member to the role of process observer. This role is borrowed from the critical incident report fishbowl.

How did the devotion/Bible Study help/hinder/enhance the process?

- a) Good _____ Explain: _____
- b) OK _____ Explain: _____
- c) Needs Work _____ Explain: _____

How was the “participation” of the attendees during the process?

- a) Good _____ Explain: _____
- b) OK _____ Explain: _____
- c) Needs Work _____ Explain: _____

In what ways was the group (attendees and TTF members) challenged during the process?

In what ways did the group (attendees and TTF members) identify and “diagnose” issues or problems in the group during the process?

What education concepts (from the learning module) created the most hope and/or anxiety?

What interventions were made by the facilitator and attendees, and how were they received?

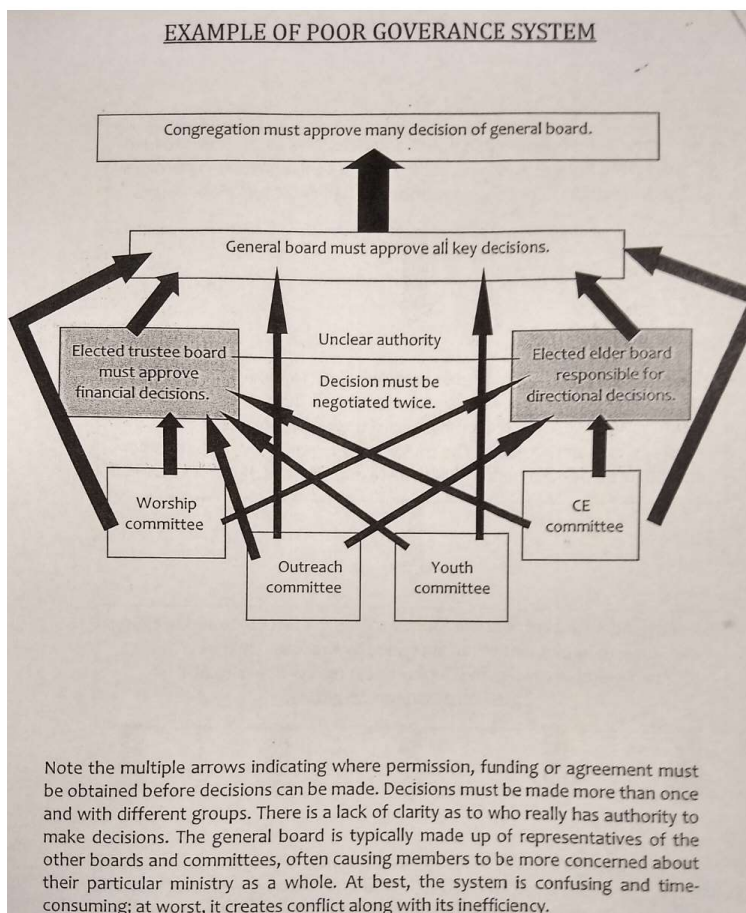
What signs of health promotion were present from the congregational leaders, the “immune system” of the congregation (i.e. staff, elders, lay-leaders, TTF members, etc.)?

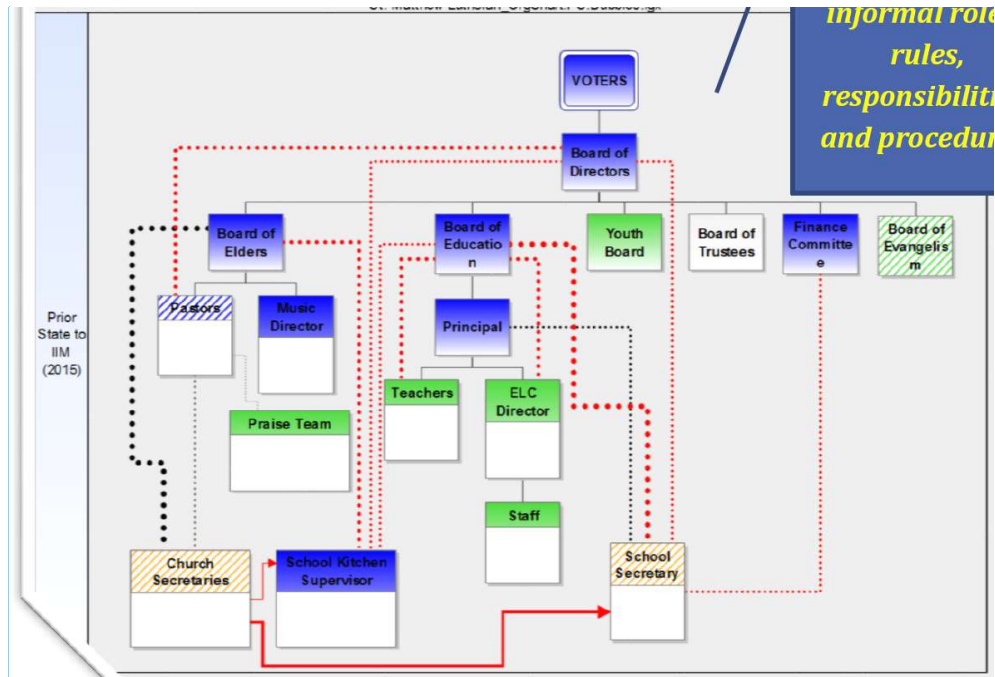
Did you observe any of the following “systems” concepts prior and/or during the cottage meetings?

Homeostasis	Vision-casting	“I” statements	Anxiety (acute/chronic)
Pockets of anxiety	Reflectiveness	Self-Differentiation	Non-anxious presence
Emotional Triangles	Distancing	Fused	Cutoff
Rebellion	Compliance	Avoidance	Healing Capacity

Did the Cottage Meeting accomplish the purpose for which it was intended? Please explain:

Teaming with the GOVERNANCE TEAMS – Mapping





Commented [A85]:

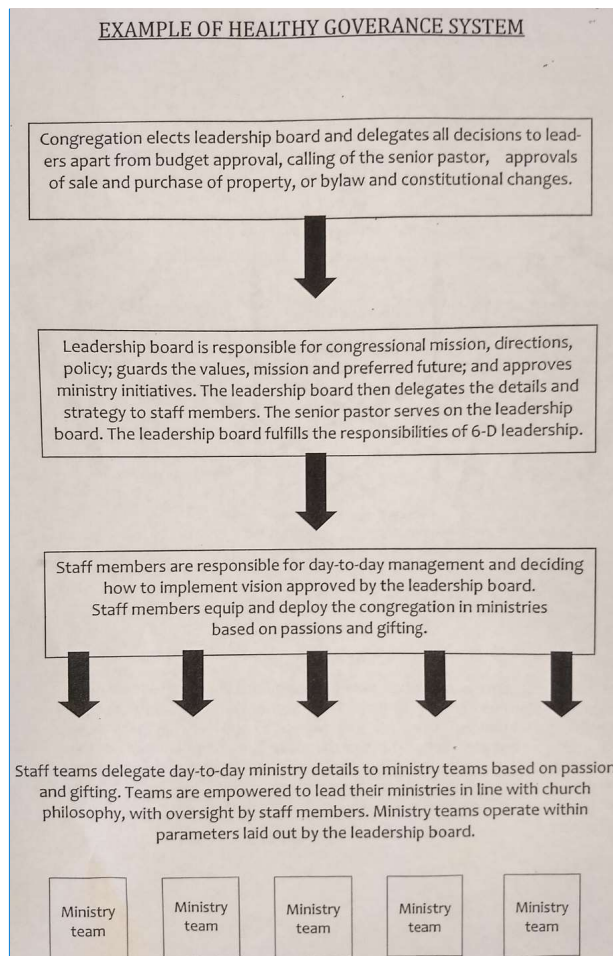
The organizational chart becomes a great learning tool:

1. Current State Analysis
2. Future State Design
3. Workarounds
4. Deep Dives
5. Over-under functioning
6. Free loaders
7. Shirkers

Avoiding organizational discipline is not the way congregations avoid problems and maintain peace and unity.

In Paul's letters to the churches he calls out behavioral problems (in leaders and members alike) in order to promote unity and peace.

In 1 Corinthians 14:33, Paul reminds the church, "For God is not a God of disorder but of peace." And in verse 40, he exhorts the church saying, "But everything should be done in a fitting and orderly way."



Commented [A86]: Future State Design

ST. JOHN'S LUTHERAN CHURCH, ST. JOHNS, MICHIGAN

2018 GOVERNING BOARD SCHEDULE

Meeting Dates	Agenda Cycle	Policy Review Calendar
January	1 - Develop an ownership linkage plan for the year 2 - Determine board education needs re: Ends issues for the year	Policies 1.0 - Desired Outcomes (Monitoring Report) SP
February	Obtain ownership input and discuss its implications for Ends (maybe get input between meetings using a survey-feedback flyer)	Policies 2.0 - 2.4 ; Ends, values, process and connections (Board Evaluation) GB
March	Based on all information obtained above, amend Ends or affirm existing Ends	Policies 3.0 - 3.5 ; Maner of Delegation (Monitoring Report) SP
April	Board Education	OPEN GB
May	Review ownership linkage and assess ministry activities with the desired mission and vision outcomes.	Policies 4.0 Senior Pastor Limitations & Monitoring; (Monitoring Report) SP
June	Board Education	OPEN GB
July	Obtain ownership input and discuss its implications for Ends (maybe get input between meetings using a survey-feedback flyer)	Policies 4.3 - 4.6 - Financial Guidelines (Monitoring Report) SP
August	Based on all information obtained above, amend Ends or affirm existing Ends	governance (Board Evaluation) GB
September	1. Start the Evaluation process of Senior Pastor	Policies 4.7 - 4.9 - Staff Relations (Monitoring Report) SP
October	1. Review Staff's Proposed Budget; 2. Start Evaluation Process of Senior Pastor	Church Board Self Evaluation GB / SP
November	Assign roles and responsibilities; 3. Compile the list of supporting documents/reports	Performance Evaluation of Senior Pastor GB
December	Voter's Meeting and Nominees Lists	Finalize Agenda & Supporting Documents

Commented [A87]: Change to "Learning to Learn Lutheran Church" in VDU, California.

Commented [A88]:

The "Agenda Cycle" and "Policy Review Calendar" are tools borrowed from Dr. John and Miriam Carver's policy governance resources.

Both assist in promoting organizational learning and systemic thinking.

- What belongs to lay leaders?
- What belongs to the staff?
- How will the staff and board be accountable to each other and the congregation?

Organizational Stewardship & Practice

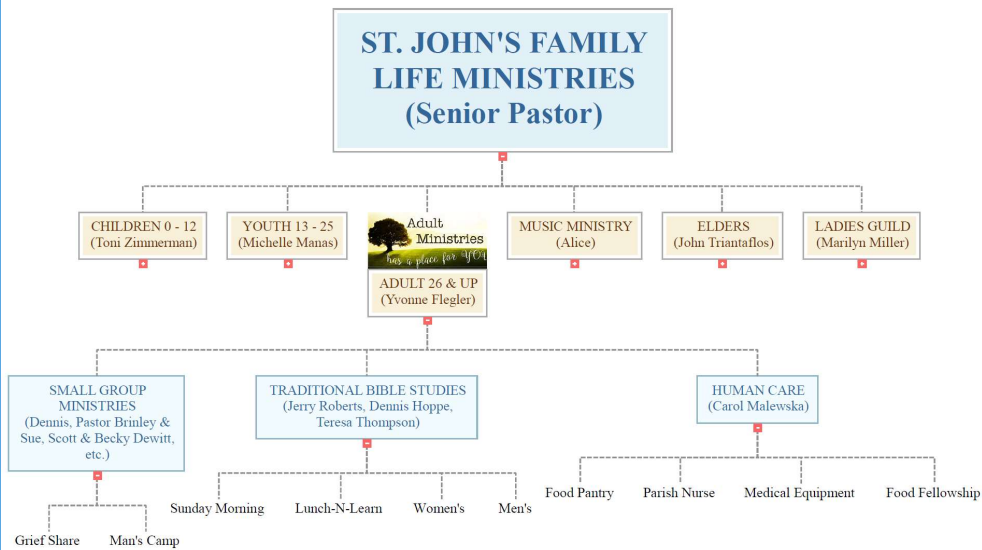
Branch Name	Duration	Start	End	Completion	
PASTOR SCHROEDER-LEE REPORT - LEARNING TO LEARN LUTHERAN CHURCH	260 days	12/9/2018	12/8/2019	46%	
• JOINING PHASE (Months 1 - 3)	66 days	12/9/2018	3/11/2019	100%	
One-on-One Interviews / Congregational Systems Inventory (CSI)	45 days	12/10/2018	2/8/2019	100%	
• Staff Professional Development	75 days	12/10/2018	3/22/2019	100%	
Form a Senior Leadership Team (SLT)	75 days	12/10/2018	3/22/2019	100%	
All Ministry Team Meetings (Quarterly Team Huddles)	70 days	12/10/2018	3/15/2019	100%	
1st Quarter Report	21 days	2/11/2019	3/11/2019	100%	
• CONGREGATIONAL SELF-STUDY PHASE (Months 4 - 9)	6 mths	3/12/2019	8/26/2019	15%	
TTF Installation	0 days	3/17/2019	3/17/2019	100%	
• TTF Training	30 days	3/19/2019	4/26/2019	0%	
TRAINING SESSION 1 - Discuss 1st Quarter Report & Charter	0 days	3/21/2019	3/21/2019	100%	
TRAINING SESSION 2 - Coming to Terms with History	0 days	3/26/2019	3/26/2019	100%	
TRAINING SESSION 3 - Church Governance	0 days	4/4/2019	4/4/2019	100%	
TRAINING SESSION 4 - Mission and Vision	0 days	4/11/2019	4/11/2019	100%	
TRAINING SESSION 5 - Cottage Meeting (CM) Roles and Responsibilities	0 days	4/18/2019	4/18/2019	100%	
TRAINING SESSION 6 - TBD	0 days	4/25/2019	4/25/2019	100%	
• TTF COTTAGE MEETING SERIES	84 days	5/1/2019	8/26/2019	30%	
MAY - TOPIC TO BE DETERMINED!	22 days	5/1/2019	5/30/2019	30%	
JUNE - TOPIC TO BE DETERMINED!	22 days	6/3/2019	7/2/2019	30%	
TTF FINAL REPORT AND RECOMMENDATIONS	45 days	7/3/2019	9/3/2019	0%	
TTF Town Hall	0 days	9/8/2019	9/8/2019	0%	
• ACTION - IMPLEMENTATION PHASE (possibly Months 10 - 11)	2 mths	9/9/2019	11/1/2019	0%	
• Voter's Meeting	0 days	9/15/2019	9/15/2019	0%	
Create an Accepted Implementation Plan (Senior Pastor & Governing Board)	10 days	9/16/2019	9/27/2019	0%	
Communicate and Create Ownership	5 days	9/30/2019	10/4/2019	0%	
• Launch Project Improvement Teams	0 days	9/9/2019	9/9/2019	0%	
Analyze the implementation setting, that is, the climate for change.	0 days	9/9/2019	9/9/2019	0%	
Effectiveness of Change	0 days	9/9/2019	9/9/2019	0%	
Impact effort matrix	0 days	9/9/2019	9/9/2019	0%	
Force Field Analysis	0 days	9/9/2019	9/9/2019	0%	
Decide how to organize the implementation effort.	0 days	9/9/2019	9/9/2019	0%	
Develop an implementation plan covering activities, responsibilities, deadlines, and so on, and have it accepted.	0 days	9/9/2019	9/9/2019	0%	
Communicate with and create ownership of changes by those affected by them and by those who will implement them.	0 days	9/9/2019	9/9/2019	0%	
Implement the ministry solution.	0 days	9/9/2019	9/9/2019	0%	
• DEPARTURE PHASE (Month 12)	5 wks	11/4/2019	12/8/2019	0%	
• Assess the Ministry Effects	25 days	11/4/2019	12/6/2019	0%	
Senior Pastor Departure	25 days	11/4/2019	12/6/2019	0%	
Review Congregational Vote	25 days	11/4/2019	12/6/2019	0%	
• Ministry Safeguards	25 days	11/4/2019	12/6/2019	0%	
Senior Leadership Team (SLT) Succession Plan	25 days	11/4/2019	12/6/2019	0%	
Behavioral Covenants (3)	25 days	11/4/2019	12/6/2019	0%	
Shepherding Flocks Ministry (Board of Elders)	25 days	11/4/2019	12/6/2019	0%	
Review Assign Approved Recommendations to BOD or Staff	25 days	11/4/2019	12/6/2019	0%	
Report and Close	25 days	11/4/2019	12/6/2019	0%	

Commented [A89]: Do you intentionally have the process map twice?

Commented [A90]: The IIM Process Map:

1. Builds trust
2. Provides guidance
3. Serves as part of the pastor's report

Teaming with the MINISTRY TEAMS – Mapping



Commented [A91]: Change to "Learning to Learn" Family Life Ministries.

Commented [A92]: Mapping each ministry team, staff member, the boards, and sub-committees helps each to "play" nicely, respecting boundaries.

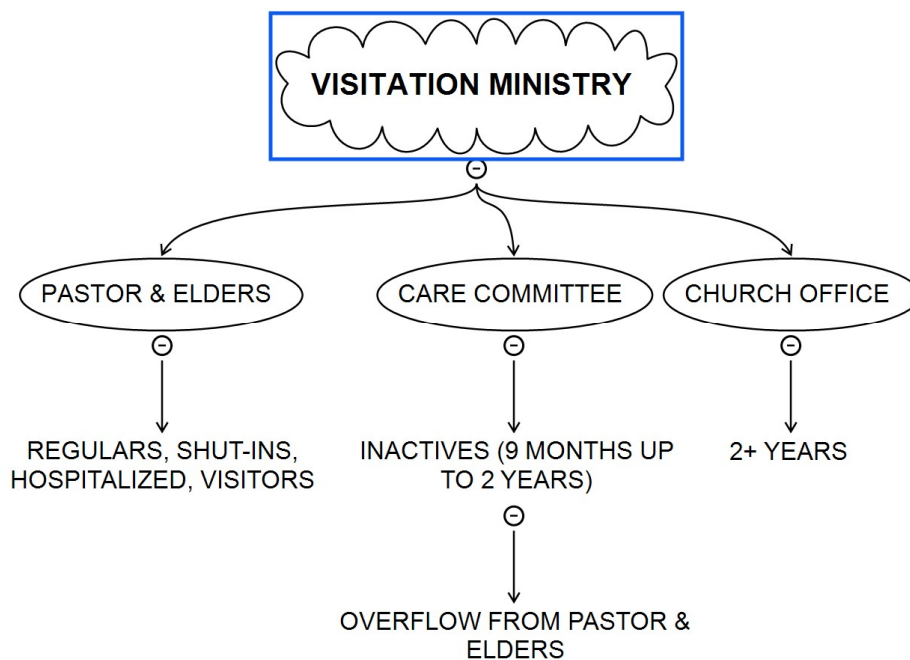
Mapping readily assists new staff and volunteers in the on-boarding process.

Mapping helps tell the congregation's story to new members.

Mapping helps to review that each ministry is aligned with the congregation's vision.

Mapping assists every ministry team, staff member, and volunteers are connected and moving together in unity.

Teaming with the ELDERS – Mapping



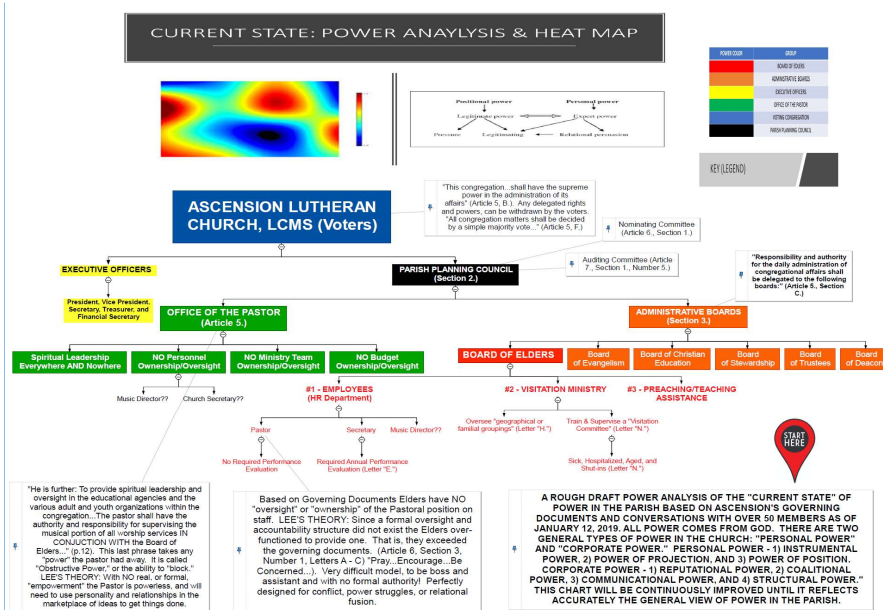
Commented [A93]: This is an example of mapping a process, the "Visitation Ministry."

Edward Deming, the renown American engineer, professor, and statistician is reported to have said often, "If you can't describe what you are doing as a process, you don't know what you are doing."

Mapping ministry processes helps avoid distractions, dead-end activities, duplication of efforts, ultimately increasing stewardship of God's resources.

KNOWLEDGE STORING

Heat Maps



Commented [A95]: Power Analysis: Types and Sources of Power (Power-Over/Power-with-Others/Power-from-Within); The Role of Power in Effective Leadership (Center for Creative Leadership, www.ccl.org).

Prayerful Safeguards – Mapping

Ministry Safeguards	25 days	11/4/2019	12/6/2019	0%
Senior Leadership Team (SLT) Succession Plan	25 days	11/4/2019	12/6/2019	0%
Behavioral Covenants (3)	25 days	11/4/2019	12/6/2019	0%
Shepherding Flocks Ministry (Board of Elders)	25 days	11/4/2019	12/6/2019	0%
Review Assign Approved Recommendations to BOD or Staff	25 days	11/4/2019	12/6/2019	0%
Report and Close	25 days	11/4/2019	12/6/2019	0%

Commented [A96]: "Behavioral Covenants in Congregations: A Handbook for Honoring Differences," (Gilbert Rendle).

Commented [A97]: What happens when the IIP leaves?

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RESOURCES

- Matchware Mindview 6 – Mapping Software (Project Management, organization charts, Gannt charts, etc.)
- Team Trust Survey, Dan Oestreich - <http://www.teamtrustsurvey.com/documents/TeamTrustSurvey.pdf>
- Congregational Systems Inventory (CSI), George D. Parsons and Speed Leas
- National Association of Lutheran Interim Pastors (NALIP), Basic Education Training Resource Manual
- Policy Governance Reference Manual: Volume 2
- IMC Transitions Times - <http://interimministrylcms.org/>
- Martin’s Online Library - <http://www.churchorganizers.org/BOOK-REVIEWS.13.htm>