

Fresh Start[®] in Your Congregation: A Resource for Lay Leaders

If you love to listen you will gain knowledge,
and if you pay attention you will become wise.
Sirach 6:33

Introduction

A change in ordained leadership puts special responsibilities on lay leaders. How the process of calling a new rector unfolds varies across dioceses, and your bishop and diocesan transition minister will be there to support and guide you. **Fresh Start** is an additional resource for you, your congregation, and your diocesan staff during this time of transition and will be one for your new clergy person when he/she arrives as well. This handbook contains ideas to help you and your congregation navigate this time in the life of your community. It is supplemented by material focused on the interim period between the departure of the incumbent and the arrival of the new clergy person. You can download this material free from the Episcopal Church Foundation's *Vital Practices* website (www.ecfvp.org – look under the Tools tab on the home page and then under Clergy Transition for **Fresh Start in the Search Process**). Although this web-based resource was designed for diocesan transition ministers you may find it useful, as could interims and search/transition consultants.

Transition

Change is “the act or instance of making or becoming different,” while transition is “a passing ... from one place, state, condition, etc. to another.”
*Revised & Updated Illustrated Oxford Dictionary,
New York, NY; DK Publishing, 1998*

The arrival of new clergy leadership marks a change for that individual **and** for the congregation, but the transition associated with this change has been on-going for some time and will continue. For clergy the transition starts when they begin thinking about looking for a new call, though the reality may not hit until they actually accept a new position and begin saying good-bye to their former community. For a congregation the transition starts when members first learn that a rector or assistant is leaving or a decision is made to call additional clergy to assume some of the ministry responsibilities of the rector or lay leaders.

Because the interim time is unsettling and known to be temporary, people may assume that when the clergy person arrives things will quickly return to normal. Not true! It will take some time – research indicates 12 to 18 months – for the new clergy person and your congregation to establish an easy and mutually-agreed-upon way of doing ministry. Helping your congregation understand this

dynamic – and remembering it yourself – will assist all of you in navigating the transition. A short PowerPoint presentation on transition is part of ***Fresh Start in the Search Process*** (look under Sessions) and could be used to introduce the concept to the congregation. If you would like to explore further, check out the bibliography found in the Overview section of ***Fresh Start in the Search Process***.

Saying Good-bye

A good exit creates the groundwork for a good entrance. So think about what needs to happen to say good-bye to your current clergy person and to thank him/her for the ministry you have shared. When planning for a farewell celebration think about the traditions of your congregation – how has it said farewell to past rectors or assistants? What of these traditions do you want to keep? What new do you want to try? The *Book of Occasional Services*¹ includes “A Service for the Ending of a Pastoral Relationship and Leave-taking from a Congregation,” and there is another model liturgy in the Supplemental Material of ***Fresh Start in the Search Process*** (look for “Exit Liturgy”). Your diocesan transition minister may have other suggestions as well.

In addition to planning a celebration make sure that appropriate referrals are made for members of the congregation who are shut-in, in on-going counseling, under spiritual direction, or in preparation for baptism, confirmation or marriage. Projects in which your departing rector or assistant has been centrally involved need to be completed or turned over to someone else. There may be a number of administrative tasks to be done such as purging the files, cleaning up the office, and making sure that all records are current and up-to-date. Finally, schedule an exit interview with the departing clergy person and the wardens or Vestry to talk about their time together and tie up any loose ends. Suggested questions to use during an exit interview and an extensive check-list of tasks for both the departing clergy person and the Vestry/wardens can be found in the Supplemental Material of ***Fresh Start in the Search Process***.

Remember, if you have an interim go back through this process of saying good-bye before your new clergy person arrives.

History-Sharing

One of the tasks of the interim period is to come to terms with your congregation’s history. Looking at the congregation’s mission over the years and how that mission has changed in response to the changing needs of the world around it provides a base for envisioning the future. A section on the congregation’s history is often part of the Profile created for the search process.

Appendix 1 contains detailed instructions on how to stage a history-sharing event. Facilitated by an outside person, this offers an opportunity for people to share the rich history of the congregation and reflect on what is important to carry

into the future. The timelines created can be left up for others to see and add to. *Be sure and save the timelines to share with the new clergy person when he/she arrives.*

Congregations as Living Systems

Congregations, like any institution, are living systems (organisms) with a history, culture, way of seeing the world and established habits, norms and ways of getting things done. (Even “new plant” congregations have a culture.) The congregation continues to exist even when leadership changes. New leadership *will* impact the congregation’s life, but the new leader will also *be* impacted. This is true of both the interim (if you have one) and the new clergy person. Both will have much to offer, and you have at least as much to teach them.

Successful entry into a living system requires a lively sense of curiosity, the ability to be a keen observer and openness to learning. People behave in what they perceive to be their own best interests – but they may not always divulge these interests (or even be able to articulate them). So successful entry also requires people within the system to be willing to be open and to share what they know, feel and believe.

Transparency

In the 1950’s, psychologists Joseph Luft and Harry Ingham produced a model of awareness in interpersonal relationships which is still useful today. The model, called the **Johari Window**, looks like this:

	Known to self	Unknown to self
Known to others	1. Open	2. Blind
Unknown to others	3. Hidden	4. Unknown

In the upper left quadrant (1) is what is known about you by yourself and others – this is what is observable (your hair color, height, weight, etc.) or what you choose to tell (e.g., that you are from Cincinnati). In the upper right (2) is what others know about you, but to which you yourself are blind. This includes anything others choose not to share (e.g., their reaction to you).

The lower left quadrant (3) is what you keep hidden from others, choosing **not** to divulge the information for whatever reason. You might, for example, opt not to show your distress at something someone says or does. The lower right (4) is what is hidden to both you and others; it is the realm of the unconscious or subconscious.

To build relationships and self-awareness expand the “open” quadrant. You can expand into the “blind” area by asking others to be transparent about what they know, to give you feedback. You expand into the “hidden” area by disclosing, by being transparent yourself. (Expanding into the “unknown” is usually the work of therapy.)

When anyone enters a new congregation, that person should seek to expand both his/her “open” areas and those of the congregation. This creates an environment for establishing mutual expectations and minimizes the opportunities for either the new person or the congregation to be “blind-sided.”

Interestingly, while the term “Johari” was coined from a combination of the first names of its two inventors, the word has significant meaning in both Sanskrit and Swahili. In Sanskrit the work means “the God who sees within,” while in Swahili Johari connotes “the essence of things.” Both are apt phrases for the work in which a congregation and its ordained leadership are engaged during their first year or two together.

What follows are some suggestions for things you can do to expand the “open” window. They are listed roughly in the order in which they might occur once the new clergy person has arrived. However, questions around issues such as *Habits, Norms and Expectations* (**Appendix 3**) and *Role Clarity* (**Appendix 4**) apply to the relationship with an interim as well. In fact, if your congregation has an interim that individual’s welcome and incorporation into the life of the congregation can be seen as a dry run for welcoming and incorporating your new clergy person.

While informal discussions are often the best way to get to know someone, sometimes a more structured process helps surface issues that would otherwise be left unspoken. In order to assure that everyone’s voice is heard, **use of an outside facilitator for these sessions is strongly encouraged**. This could be your congregation’s search or transition consultant, a member of the diocesan staff, or a clergy colleague. It should **never** be a member of your congregation.

Saying Hello/Getting to Know Each Other

Just as individuals and congregations have patterns for saying good-bye, they also have patterns for saying hello and for entering a new community. Think about your own experiences moving to a new town, starting a new job, or joining a new congregation. What did people do to make you feel welcome and at home? What does your congregation do to welcome and incorporate new members? How has it welcomed a new clergy leader in the past? What can you learn from these experiences? What would you want to keep? What new things might you want to try?

If you have had an interim, involve him/her in this discussion. How was he/she introduced to the congregation? Was there an intentional process for helping the interim and members of the congregation get to know each other? From the interim's perspective, how well did that process work? What suggestions does he/she have about how the new clergy person should be welcomed?

There are many ways to help the new clergy person get to know your congregation (and vice versa), and congregational culture will determine which are most appropriate. These ways include small dinners in people's homes, holding an open house at the rectory, and inviting the new clergy person to attend at least one meeting of each committee. In addition, consider holding a history-sharing event. If you did one during the interim, use the timelines developed and incorporate the new clergy person's perspective. **Appendix 1** has instructions on how to do this.

Schedule an all-congregation event at a convenient time (e.g., Saturday morning, Sunday after church) and place. Post the timelines generated at the History-Sharing exercise done during the interim period. Share the highlights of the congregation's history perhaps by having a panel of long-time members share their memories. Ask the new clergy person to reflect on what he/she has heard and tell the story of the journey that brought him/her to be with you. An outside facilitator can help design and lead this event which ideally should take place within a few months of the new person's arrival.

In addition to these more social events and the ideas that follow, take a look at the checklists for clergy who are leaving a congregation (Supplemental Material to ***Fresh Start in the Search Process***). This is information that will need to be conveyed to the new clergy person as part of bringing that person on board.

Spiritual Care of Leaders in Ministry

By the time the new clergy person arrives he/she will already have met the Vestry and the Search Committee. There may have been a separate Profile

Committee or a Transition Team. These people should be among the first to have some time with the new clergy person to share their journey of transition. They should also be acknowledged publicly by the congregation for their faithful efforts.

One way to greet the new clergy person and provide an opportunity for sharing is to plan a dinner or dessert for him/her with key lay leaders and engage in conversation about the experience of the interim time. Questions such as the following can guide the discussion.

- What has the transition been like from a personal perspective?
- How were lay leaders chosen and what roles did they play?
- How did the interim time strengthen their faith? How did it challenge it?
- What realizations did they have about the institutional church?
- What and who helped them stay well during this time?
- What was the most moving event of the interim time? Why was it so important to them?
- What was the funniest thing that happened? The scariest?

Share as well what new things were implemented during the interim. Are these things that people would like to see continued? Why or why not?

Be sure to ask the new clergy person to share his/her story of transition – what this time of anticipation, of saying good-bye to another parish or to seminary has been like and what he/she has learned as a result.

If the congregation has held a public celebration and acknowledgement of the work of key leaders during the interim, tell the new clergy person about it. Individual recognition, by name, is important. If not, work with him/her to help that happen, focusing on the work the people have done (NOT the resulting call). Be open with the new clergy person about whether these lay leaders (including you!) need to take a rest from leadership involvement for a time – they are probably tired (but ask first; don't assume there is no interest in continuing in some leadership capacity).

Exits and Entrances

Another approach is to talk about what is being left behind as this new mutual ministry gets underway. The clergy person (and family, if there is one) will have left a community of some kind, as well as a ministry to a certain group of people, and may have moved physically to an entirely different city or diocese. As lay leaders on the Vestry and the Search Committee, you undoubtedly undertook exceptional responsibilities during the interim phase. While you may express eagerness to lay down your leadership burdens, you may also be mourning the loss of your time together and the ministry you performed.

You honor these mixed feelings by providing a time to find out how these exits and entrances went and by sharing your own journey. Find a time when you can meet, as a whole group or in subgroups, with the new clergy person and engage in conversation. A structured process for holding this conversation is found at **Appendix 2**. Use of an outside facilitator is recommended.

Vestry Retreat

Early in the new call plan a Vestry retreat – preferably a day and a half with an overnight, but at least a day-long event. An outside facilitator should be used. The purpose of the retreat can vary, depending upon its timing, but it can include:

- Team-building
- Clarifying habits, norms and expectations (see **Appendix 3**)
- Clarifying roles (see **Appendix 4**)
- Setting goals for the up-coming year.

If the retreat occurs following the Annual Meeting when new Vestry members are elected, time for team-building and organizing the work of the Vestry will be essential. If elections are some months away you can consider expanding the group to include other lay leaders (e.g., committee chairs) for whom clarifying norms or roles would be important.

The initial retreat is also the time to set goals and expectations for the first year of this new joint ministry. These goals, as well as the Profile, can become the basis for a mutual review of ministry at the end of the first year.

The length of the retreat will be influenced by what the Vestry is used to doing and the availability of suitable space. It is always best to hold the retreat outside of the parish (borrowing a neighboring parish's space is an inexpensive alternative), and it may take some persuasion on your part to do this. If at all possible, arrange for food to be catered rather than putting the burden on participants to bring it.

If not already established, begin setting the expectation that retreats will be held at least annually for purposes of planning and team-building. Three valuable resources for your vestry are:

- ***The Vestry Resource Guide*** – Revised in 2007, this publication of the Episcopal Church Foundation (ECF) provides information about the role and function of a vestry and its members and includes meeting design and Bible study resources for vestry meetings. A Spanish-language version is also available. Both can be ordered from Forward Movement Publications (www.forwardmovement.org).

- ***Vestry Papers*** – Also a product of the ECF, this e-newsletter provides vestries with spiritually-grounded and practical advice on a range of subjects faced by congregational leadership. Register to receive this free monthly e-newsletter at www.ecfvp.org.
- ***The Vestry Handbook*** – Christopher Webber’s book offers valuable guidance about goal setting, identifying a vision, growth and working for change and is a useful resource for planning retreats. The book is published by Morehouse Publishing and is widely available.

Uncovering Habits, Norms & Expectations

Every congregation has its “way of doing things” and expectations about clergy leadership and how clergy should do their work. Staff members also have their habits, norms and expectations, as does the clergy person. The more these can be articulated and shared the less likely there will be misunderstandings and hurt feelings.

Appendix 3 outlines a structured way to surface these habits, norms and expectations. Several conversations may be needed: with the Vestry to start (this could be the subject of the initial retreat), with staff, and perhaps with committee chairs or committees themselves (think especially about holding conversations with the Altar Guild and the Finance Committee).

Clarifying Roles

The roles clergy are asked to play, both formal and informal, are driven by the congregation’s culture and the norms established by their predecessors. The roles a clergy person naturally assumes are similarly driven by experience and the norms he/she carries over from previous ministry. Clergy expectations and the congregation’s may or may not be in sync. In addition, clergy hold expectations of the roles lay leaders should play that may or may not conform to your expectations. As with habits and norms, articulating the role expectations and perhaps renegotiating them can help prevent misunderstandings and hurt feelings.

A process for clarifying roles is outlined in **Appendix 4**. This is especially good to do with the Vestry and might also be done at an initial retreat. The process provides a fun way to uncover role expectations. Use of an outside facilitator enables you to participate more fully and pay attention to what is being said, but is not absolutely necessary.

Mutual Ministry Cycle

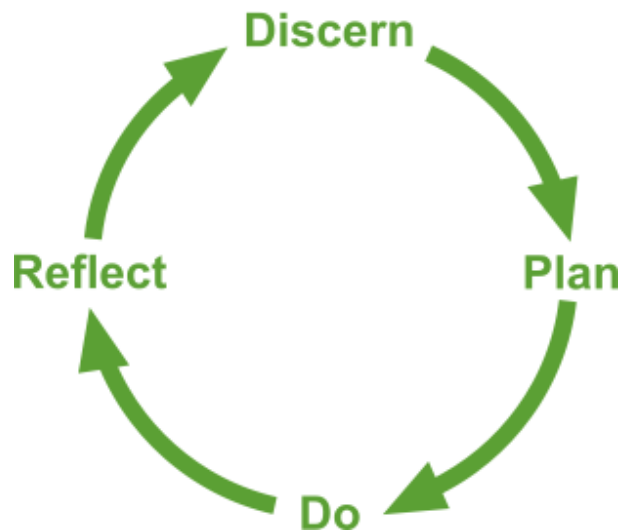
Measurement is to “ascertain the extent or quantity of (a thing) by comparison with a fixed unit or with an object of known size,” while feedback is “the modification or control of a process or system by its results or effects.”

*Revised & Updated Illustrated Oxford Dictionary,
New York, NY; DK Publishing, 1998*

Few of us like to be measured, fearing that we will fall short of whatever standard has been set. However, all living systems, including you, need feedback to live. Feedback is the thermostat that maintains the system in a healthy balance. For feedback to be effective, however, the system needs to define “health.”

All the suggested activities outlined above are designed to do just that: to set mutually-agreed upon norms and expectations that define a healthy relationship. In the Profile, the letter of agreement or contract, and perhaps through some goal-setting at a Vestry retreat, additional expectations have been set. Now at the end of the first year, it is time to take stock of where the clergy leader and the congregation are relative to these norms, expectations and goals.

Feedback is an on-going process that is part of a larger cycle of discerning God’s will for us, planning to implement what we have decided to do, doing, and reflecting on what we have done to see if we achieved the results we wanted. Although it shows as a single cycle in the following graphic, in reality effective organisms (including organizations) are constantly monitoring their environment and using feedback to modify what they are doing.



Discern – Plan – Do – Reflect Cycle

The focus of reflection or feedback is not any one individual (including you!), but the congregation's responsibility for ministry. Just as the disciples reported to Jesus what they had accomplished when he sent them out in pairs to heal the sick and proclaim the Gospel (see Luke 10:1ff), so clergy and lay leaders need to be accountable for what is being done in God's name.

As the saying goes, "if you don't know where you are going, any road will take you there," so having agreed-upon goals and expectations is helpful before undertaking a review. Remember, however, that feedback is continuous – and the congregation is doing *something* even in the absence of a stated mission. So a review can always ask "what in the name of God are we doing?" and begin the process of discerning if that is, in fact, what the congregation is called to do.

For an initial mutual review of ministry use the Profile and/or job description developed when the new clergy person was called as the starting point for the conversation. Remember that whatever was written in the Profile is probably now already a year or two old and may have been overtaken by events. Acknowledging that the situation has changed and modifying or resetting goals keeps the planning cycle going.

A process for conducting an initial review is contained in Samuel P. Magill's *Living into Our Ministries: The Mutual Ministry Cycle Resource Guide* (see pp. 33-36). The book can be downloaded free from the Episcopal Church Foundation's *Vital Practices* website (www.ecfvp.org – look under the Tools tab on the home page and then under Leadership). Other processes are also outlined in the book, including some more extensive ways of eliciting feedback that can lead into a strategic planning process.

Use an outside facilitator for any feedback/review process. It is too easy for the session to degenerate into blaming. Having an outside facilitator design and lead the session helps ensure that the conversation stays on track.

Summary

Hopefully, you and your new clergy person have gotten to know each other, set mutually agreed upon expectations, negotiated your respective roles, and established a climate of transparency. To maintain a healthy relationship, remember to keep the window "open" – reengaging on a regular basis in discussions of roles, expectations, and goals and always adjusting to the environment within which your congregation's ministry unfolds. The work of the Church is never done as Bishop Kenneth Untener of Saginaw so eloquently noted in the following.²

The kingdom is not only beyond our efforts,
it is even beyond our wisdom.
We accomplish in our lifetime only a tiny fraction
of the magnificent enterprise that is God's work.
Nothing we do is complete, which is another way of
saying that the kingdom always lies beyond us.
No statement says all that could be said.
No prayer fully expresses our faith.
No program accomplishes our mission.
No set of goals and objectives includes everything.
That is what we are about.
We plant the seeds that one day will grow.
We water the seeds already planted,
knowing that they hold future promise.
We lay foundations that will need further development.
We provide yeast that produces effects
far beyond our capabilities.
We cannot do every thing, and there is a
sense of liberation in realizing that.
This enables us to do something, and to do it very well.
It may be incomplete, but it is a beginning, a step along the
way, an opportunity for the Lord's grace to enter and do the rest.
We may never see the end results, but that is the difference
between the master builder and the worker.
We are workers, not master builders; ministers, not messiahs.
We are prophets of a future not our own.

¹Church Pension Fund. Book of Occasional Services. New York, NY: Church Publishing, 2004, pp. 339-346.

²*National Catholic Reporter*, March 28, 2004

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Appendix 1

History-Sharing and Understanding

History is a vision of God's creation
on the move.

Arnold J. Toynbee



Purpose

For participants to share their histories and gain an understanding of each other.

Theological Understanding

Scripture tells us over and over the importance of knowing and sharing the story of being a people of faith. Through the telling of these stories we help others understand how we are connected to God and learn about the faith journeys that brought each of us where we are today. In the sharing, the Holy Spirit will reveal more to us both.

Note: *An outside facilitator is needed for this session, and some pre-work must be done by a congregational planning team. The content, however, comes from the participants themselves.*

Prior to Session

Appoint a congregational planning team: The team will create the basic timelines, plan and advertise the meeting, arrange for food or refreshments, etc.

Create the timelines: Using a large roll of butcher paper at least 2' wide (available at office supply or art stores):

- Cut three equal lengths of paper, each a minimum of 9' and up to 24' long.
- On each length of paper, draw a line lengthwise across the middle, creating a timeline that covers the lifetime of the congregation from its founding. On each of the three timelines, put the founding date of the congregation at the far left and the current year at the far right.
- Divide the timelines into two segments, using most of the length for the last 50 years. Mark the decades for the last 50 years. Each timeline should have the dates spaced in the same way – they look something like this:

1890	1950	1960	1970	1980	1990	2000	2011
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- Label one timeline “(insert name of your congregation)’s History.”
- Label one of the remaining timelines “Personal History.” The third should be labeled “World History.” You may want to add a fourth timeline for your immediate community. Usually, this timeline is labeled “City History” (this might be important, for example, if the church was founded to minister to a set of workers or if plant closings devastated the life of the congregation), but a diocesan, region or state history might be equally or more important to your congregation.
- If you wish, you may add some key dates to these timelines, but leave them mostly blank to be filled in by participants.
- In the meeting room, post each of the timelines on different walls with the congregational one at the front of the room. If you do not have sufficient wall space use sheets of foam board taped together and either placed across several easels or made into a stand-up “wall” (six sheets will create a 24’x8’ wall – tape them accordion style with the tape on alternating sides so you can fold them up and reuse them – the timelines can be attached to the foam board with push pins or masking tape).

If you want to include some dates on the timelines you can find information on key historical events on the following websites.

- For general history timelines, check www.factmonster.com/spot/timelinedarchive.html.
- There is a very generic world timeline at www.timelineindex.com.
- Although designed for individuals, you can enter a beginning and ending date covering a span of up to 140 years at www.ourtimelines.com and get a timeline with events (mostly from the US) and key historical figures that track with each year of your congregation’s life.
- For Anglican Church dates up to 1998, go to <http://justus.anglican.org/resources/timeline>.
- For dates relative to your diocese or city, look for local history books or for historical information posted on the diocesan or local historical society websites.

If there are photos of previous rectors or of key events in your congregational archives, and your timeline is large enough, you can add copies (do not use the originals as they might get damaged) to the timeline.

Pick a time and format for the session: Allow 3 hours for the program – and plan the session around a meal if at all possible (the annual “coming home” fall dinner, a Saturday morning followed by lunch, a Friday evening potluck, etc. – whatever works for your congregation).

Find a facilitator: Your congregation’s search consultant or other congregational consultant; the rector of a nearby congregation (especially someone who has

been through **Fresh Start** and has participated in a history-sharing exercise) are all good possibilities.

Invite the congregation: Invite everyone (be sure and arrange child care if needed). If there are homebound members, interview them in advance to get their stories to share at the session. If there are former members nearby who have knowledge of the congregation's history invite them back to share their memories. Specifically encourage attendance and participation by members who have extensive knowledge of the congregation's history, perhaps asking them to be part of a panel (work out design with your facilitator).

Copy handouts and gather supplies: You will need sufficient copies of Handout 1 for every participant, several sets of Handouts 2-4, markers that will not bleed through the timeline charts, pencils or pens for participants to use in completing Handout 1.

At the Session

Post the timelines on a wall where people can add to them: Be sure you have markers that will not bleed through the paper! As people enter, ask them to put their name by the date when they joined the congregation. Arrange chairs so that people can see the timelines.

Agenda (suggested times shown in parentheses):

1. Opening meditation or worship (10 minutes): Suggested reading – Genesis 50:22-26 and Exodus 13:17-19.
2. Individual history reflection (20 minutes): Give participants Handout 1 and ask them to complete. If this is done after the new clergy person arrives, he/she does this as well! (See Guidance for Facilitators)
3. Small group story development (20 minutes): Divide the group into at least three subgroups of no more than 7 people per group. Move timelines to one wall, one above the other with the Congregation's History Timeline in the middle. Distribute the appropriate Handout (2, 3, 4) to each group. (See Guidance for Facilitators)
4. Break (10 minutes)
5. Sharing of stories (30 minutes): Small groups report out.
6. History of the congregation (30 minutes – optional): facilitated discussion with people sharing their memories and stories about the congregation and its past. Another option is to plan a series of panels of key congregants by decade to share their stories – with questions and

comments coming from the rest of the people gathered. (See Guidance for Facilitators)

7. Reflection by new clergy person (15 minutes – done only if session held after new clergy person has arrived): facilitated discussion about surprises, patterns, observations. (See Guidance for Facilitators)
8. Wrap up and closing prayer. (5 minutes)
9. Festive meal together to continue the conversation.

Note: *There are other models for conducting a history-sharing exercise. Your facilitator may have other ideas for you.*

Appendix 1 – History-Sharing Guidance for Facilitators

Talking Points and *Instructions*

History is a vision of God’s creation on the move.

Arnold J. Toynbee

<p><u>Introduction</u></p> <p>Our time today is to reflect on what Toynbee calls “a vision of God’s creation on the move” – to get to know each other better through our own histories, the history of this congregation and the world around it.</p>	<p><i>Write the Toynbee quote above on a flip chart</i></p> <p><i>As people arrive, have them write their name on the “(name of congregation)’s History” chart by the date when they first became a part of the congregation.</i></p> <p><i>If this is done after the new clergy person arrives, post the previous timelines and skip to “Going Deeper” below after giving a brief welcome and introduction.</i></p> <p>Note: <i>The timelines need to be set up so that people can easily get to them and add events. See the instructions in the resource section for more details.</i></p> <p><i>One of the timelines is always labeled with the name of the congregation, another “Personal History,” and the third “World History.” A fourth timeline may be added depending upon the circumstances of the congregation – see resource section for options.</i></p>
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There are three timelines posted around the room. The one in front is that of this congregation with a few key dates already placed on it. The other two are labeled “Personal History” and “World History.”

Take a few minutes to think about your own life. On the handout I have just given you, draw your own life’s timeline, noting the milestones that have brought you to this place in your journey. Then think about those events in the world that have been important to you or that you feel are important to society as a whole, as well as those milestones you think are important from this congregation’s history. Jot these down on the handout, and when you are ready write the milestones you have identified on the appropriate timeline using a marker so what you add can be easily seen.

Finding the Stories

Distribute Handout 1 – Be sure and have pencils or pens on hand!

Personal milestones go on the “Personal” timeline, etc.

When everyone has posted their events on the three timelines, divide participants into three or more groups. Assign one group the “Personal History Timeline” (Handout 2), the second group the “World History Timeline” (Handout 3), and the third group the “(name of the congregation)’s History Timeline” (Handout 4). These groups may be as small as two (2) but no larger than seven (7). If you have more than three groups, assign each timeline to more than one group. Reposition the three timelines so that they are on one wall, if at all possible, directly above one another with the congregation’s in the middle.

Each of these timelines has a story to tell – about the experience and age of the people in this room and how their lives were impacted by events in the world, and about the mission of this congregation and how it has changed over the years to meet the changing needs of God’s people. Using the questions in your handout find the story that the timeline your group has been assigned has to tell. Look at the other timelines as well – how do the stories intersect or influence each other? Be prepared to share the story your group develops with the larger group.

What stories have you found in the timelines? As you listen to each story, feel free to chime in with your own observations and sense of meaning.

Going Deeper (optional)

I’d like to add to the history of this congregation to give you some more background on where it has been and what it carries forward from that past.

After the groups have had time to develop the stories, ask them to report out starting with the “Personal History” group, then moving to the “(name of congregation)’s History” and finally the “World History.” Facilitate cross-conversation and observations among the various groups as the presentations are being made.

Note: This is an optional piece to enhance additional understanding of the congregation’s history. If the timelines have been done as part of the interim period, you could start a history-sharing with a new clergy person at this point.

Fill in the history of the congregation – either by asking people to share their memories or by having a series of speakers/panels representing different eras in the life of the congregation. Be sure the following are addressed:

<p><u>Hearing from the New Clergy Person (optional)</u></p> <p>I'd like to ask your new rector (associate) for his/her reflections about the history that has been shared and his/her own journey to this place. Looking at your congregation's timeline, how does its story relate to your personal history and to the stories of the world that we have heard today? Were there surprises? "Aha's?" What</p>	<ol style="list-style-type: none"> 1. <i>How long has the congregation been in existence? If new, where did the people come from and where were they worshipping before? What was the founding era like?</i> 2. <i>When were the "glory days" and why are they considered that?</i> 3. <i>Are there major internal events – a disastrous fire, dissolution of pastoral relationships, fraud – that people still point to?</i> 4. <i>What impact did outside events (i.e., in the diocese, US, Anglican Church, perhaps the world) have on the congregation and its history?</i> 5. <i>What about the present – what's the same and what's different from previous eras? How are external events impacting the congregation as a whole? What Bible story is the congregation living now?</i> 6. <i>What are "Joseph's bones" for this congregation?</i> <p><i>Note: If the new clergy person was not present when the timelines were created you may want to give him/her Handout 1 prior to this session. In addition to the questions given in the left-hand column, ask the new clergy person to share what world, church, etc. events influenced his/her life as well as the highlights of his/her journey to accept the call to this congregation.</i></p>
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<p>questions do you have? What patterns do you see in the congregation's response to the world around it?</p>	<p><i>At this point, the new clergy person should offer his/her reflections.</i></p> <p><i>Ask for any final reflections or observations from the participants.</i></p> <p><i>End the session with a prayer, poem or appropriate reading.</i></p>
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History-Sharing and Understanding Handout 1

1. Draw your personal timeline, noting major events or milestones that have influenced you and your journey to this place.

2. What major events or milestones do you feel are important to add to the World timeline? Jot them down by date below.

3. What major events or milestones are you aware of in the life of this congregation? Jot them down by date below.

When you have answered all three questions, take your paper and enter your answers on the appropriate timeline (e.g., personal milestones on the "Personal History Timeline," congregation's milestones on the "Congregation's History Timeline").

History – Sharing and Understanding Handout 2

The Story Told by the Personal History Timeline

Purpose

To identify and interpret trends, themes and patterns important to us and establish a context for our life together.

As a group, use the Personal History Timeline to tell us a story about the people in this room. In crafting your story, take into account:

1. What the Personal History Timeline says about who the people in the room are;
2. How their stories have been influenced by or intersected with the events on the Congregation's and World History Timelines; what decade(s) will have been important in their formation;
3. What, from their perspective, they are likely to bring with them into their ministry (their "Joseph's bones"); and
4. What the implications are for our congregation.

Be prepared to share your story and observations with the rest of the group.

History-Sharing and Understanding Handout 3

The Story Told by the World History Timeline

Purpose

To identify and interpret the trends, themes and patterns important to us and establish a context for our life together.

As a group, use the World History Timeline to tell us a story about our society as a whole. In crafting your story, take into account:

1. How these events relate to what is told on the Personal History Timeline,
2. How these events relate to what is on the Congregation's History Timeline,
3. Those things from the past that are being carried into the future (the "Joseph's bones"), and
4. The implications of the World story for our congregation.

Looking across the timelines, what patterns do you see?

Be prepared to share your story and observations with the rest of the group.

History – Sharing and Understanding Handout 4

The Story Told by the Congregation’s History Timeline

Purpose

To identify and interpret the trends, themes and patterns important to us and establish a context for our life together.

As a group, use the Congregation’s History Timeline to tell us a story about our congregation. In crafting your story, take into account:

1. How these events relate to what is told on the Personal History Timeline,
2. How these events relate to what is on the World History Timeline,
3. Those things from the past that the diocese is carrying forward today (its “Joseph’s bones”), and
4. The implications of the congregation’s story for our ministry today.

Looking across the timelines, what patterns do you see?

Be prepared to share your story and observations with the rest of the group.

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Appendix 2

Exit and Entrance: Patterns, Emotions and the Wilderness



All changes, even the most longed for, have their melancholy; for what we leave behind us is a part of ourselves; we must die to one life before we can enter into another.

Anatole France



Purpose

For participants to share what their exits and entrances have been like, reflect on what the wilderness has been like for them, and to acknowledge what they need from each other.

Theological Understanding

To begin a new life requires relinquishing the old. In Scripture this is often portrayed as the wilderness time. In the Exodus story the Israelites wandered for 40 years. Those who had known Egypt and God's miracles in the desert could not cross into the Promised Land because they had not let go of the old life and believed. Jesus' public transformation from carpenter of Nazareth to prophet and teacher is marked by the 40 days in the wilderness which follows his baptism. In both stories, temptations occur (to return to Egypt, to exercise power in ungodly ways) and yet God is there, feeding his people with manna and sending his angels to tend them.

In the wilderness of transition, it is helpful to think about what we need to relinquish to fully enter into our new lives, to consider what has tempted us, and to acknowledge those angels who have tended us during this time.

Note: *Use of an outside facilitator to set the stage for the discussion and help keep it flowing is recommended.*

Prior to Session

Decide whom to invite: Members of the Vestry and the Search Committee and other key lay leaders (particularly those identified by the Vestry as having played an important role during the interim time).

Pick a time and format: This topic lends itself to a conversation. Find a comfortable place for people to sit, sharing their stories. Allow at least two hours, perhaps ending with a meal that would allow the conversation to continue to flow.

Find a facilitator: Your congregation's search consultant or other congregational consultant or the rector of a nearby congregation (especially someone who has been through **Fresh Start** and has participated in the *Exit and Entrance* session) are all good possibilities.

Invite participants

Copy handouts and gather supplies: You will need a flip chart easel with pad, markers, pens or pencils, and copies of the handouts for every participant.

At the Session

Arrange comfortable chairs in a circle with an opening for the facilitator and flip chart where everyone can see.

Agenda (suggested times shown in parentheses):

1. Opening prayer and meditation – suggested reading, Mark 1:12-13. (5 minutes)
2. Introduce concept of a good exit makes for a good beginning. (10 minutes)
3. Reflect on exits related to the current transition – use Handouts 1 (for clergy person) and 2 (for lay leaders) if you want to give people a chance to think about their responses, then facilitate a conversation or use the questions to generate a conversation. (20 minutes)
4. Reflect on entrances related to the current transition – use Handouts 3 if you want to give people a chance to think about their responses, then facilitate a conversation or use the questions to generate a conversation. (20 minutes)
5. Reflect on the wilderness – use Handout 4 if you want to give people a chance to think about their responses, then facilitate a conversation or use the questions to generate a conversation. (30 minutes)
6. Acknowledge each other and share your prayers for your congregation. (15 minutes)
7. End with rereading of Mark 1:12-13. (5 minutes)
8. Meal together to continue the conversation.

Appendix 2 – Exit and Entrance Guidance for Facilitators

Talking Points and *Instructions*

All changes, even the most longed for, have their melancholy;
For what we leave behind us is a part of ourselves;
we must die to one life before we can enter into another.
Anatole France

<p><u>Introduction</u></p> <p>To begin a new life requires relinquishing the old. The Israelites who had known Egypt and God’s miracles in the desert could not cross into the Promised Land because they had not let go of the old life and believed (Numbers 14:20-24). Being able to let go of their slavery was essential to becoming a free people under a new covenant with God.</p> <p>That new covenant included dwelling together and knowing each other to an extraordinary degree. “I will place my dwelling in your midst, and I shall not abhor you. And I will walk among you, and will be your God, and you shall be my people.” (Leviticus 26:11-12). Learning to know the “other” and be known by them is one of the challenges of a new ministry.</p> <p>Leaving one place/situation and moving to a new one is emotional work – even if the change is longed for (e.g., getting married, graduating from school or being a new rector/associate or, for a congregation, calling a new leader).</p>	<p><i>Write the above quote from Anatole France on a flip chart</i></p>
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Think of a time in your past when you made such a change (not your current situation). What were some of the emotions you felt at that time?

It is no wonder that change evokes such mixed emotions for, as French Nobel laureate Anatole France notes, it is not possible to enter into a new life without dying to the old one.

Just as the Israelites had to “let go” of Egypt and their understanding of themselves as slaves in order to enter into a new covenant with God, so we must let go of the past in order to enter the future. It is like moving from Washington to New York – we have to say good-bye to Washington AND give up our image of ourselves as Washingtonians before we are freed to make new friends and become real “New Yorkers.”

Reflecting on Exits Related to the Current Transition

Let’s look at exits related to the current transition – the clergy person’s exit from his/her previous position and the congregation’s exit from the former rector or associate. Take a few minutes to read through the questions on the sheet I gave you and jot down your responses to them. After a few minutes I’ll ask you to share your observations with each other.

Do a quick brainstorming, capturing the words on a flip chart – frequently, these are a mix of hope-filled words like excitement, anticipation and anxiety-filled words like fear, loss.

Use Handouts 1 (for clergy) and 2 (for lay leaders). The clergy are asked to reflect on how they left their previous position and the lay leaders to describe how they said “good-bye” to the clergy person’s predecessor. Be sure and have pencils or pens on hand!

Or

Use the questions in the handouts to generate a sharing of experiences of the exits from the perspective of the clergy person and the lay leaders.

Reflecting on Entrances Related to the Current Transition

Now let's look at how you are getting to know each other. Please take a few minutes to read through the questions on this sheet and jot down your responses to them. After a few minutes I'll ask you to share your observations with each other.

Reflecting on the Transition Time

The time of moving from a safe place we know to a new place we are not sure about is a familiar theme in Scripture – it is known as the “wilderness” time. The Israelites left Egypt and wandered for 40 years. And in the brief passage from Mark that we read earlier, Jesus is driven into the wilderness for 40 days following his baptism. These wilderness experiences are often where we find God most present and ourselves most open for reflection and exploration. So let's think about how this transition time has been so far. Take a few minutes to read the questions on this sheet and jot down your responses and then we'll open our conversation.

At this point in the transition, what do you need from each other, from God? What is your prayer for each other and for your congregation at this time?

Use Handout 3

Or

Use the questions to generate a sharing of what the entrance experience has been like.

Use Handout 4

Or

Use the questions to generate a sharing of what the wilderness experience has been like.

Facilitate a conversation about what the wilderness has been like, probing especially for who have been the “angels” and whether they have been acknowledged. Encourage thinking about how that might be done in a public way.

	<p><i>Give them a few minutes to think through their response, then ask for them to share their thoughts and prayers.</i></p> <p><i>Summarize what you have heard, capturing any “next steps” that have emerged from the conversation and end with a rereading of Mark 1:12-13.</i></p>
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Exit and Entrance Handout 1 (Clergy)

Looking at Exits

How did you say good-bye to your former congregation (or the community you were a part of before you accepted your current call)? Were there subgroups (e.g., shut-ins, a colleague group, a field education parish) that you said good-bye to in a special way? How about groups outside the congregation such as community boards or ecumenical groups? Describe.

How did your congregation/community say good-bye to you? Describe what happened.

How about your family? How did they say good-bye? How did the congregation/community say good-bye to them?

Did you complete the ministry you came to your former place to do? What legacy did you leave behind for others to build upon?



Exit and Entrance Handout 2 (Lay Leaders)

Looking at Exits

Describe the circumstances under which your former rector/associate left your congregation. Was there a chance for him/her to say good-bye? And how was that done? How well did she/he exit with home-bound parishioners, committee chairs, vestry, bishop and staff, choir, altar guild, community leaders, etc.? Describe.

How did your congregation/community say good-bye to the former rector/associate? Describe what happened.

How about your former rector/associate's family? How did they say good-bye? How did the congregation/community say good-bye to them?

Are there still unfinished pieces to the leave-taking? What could be done and who could help?

What legacy did your former rector/associate leave behind for others to build upon?



Exit and Entrance Handout 3

How was the Entrance?

What are the most helpful things that the clergy person, his/her family, and the congregation have done to get to know each other?

What was the first Sunday in the congregation like?

What intentional processes have been followed to help the new clergy person get to know certain key subgroups (e.g., the choir, the altar guild)? Are there other groups that should be included?

If the clergy person has a family, what are the most helpful things that have been done to incorporate them into the life of the congregation? What more needs to be done?

How is the new clergy person finding out about and meeting parishioners who aren't there regularly (e.g., shut-ins)? Is there something more that should be done?

What still needs to be done to make the clergy person and his/her family feel "at home?" Who do you need to ask to help?



Exit and Entrance Handout 4

What about the Wilderness?

What was or is the “wilderness” like?

What or who tempted you to take an easy way through the process (“Satan”)?

What or who are the “beasts” that have made the transition difficult or that you fear may make it difficult?

Who are the “angels” who are helping you, feeding you, making the time blessed?

Have your “angels” been thanked? If not, what plans can you make NOW to do so?

What is your prayer for your relationship with the congregation/clergy person this coming year?

Appendix 3

Habits, Norms and Expectations

Habit is habit and not to be flung out of the window by any man, but coaxed downstairs a step at a time.

Mark Twain

Purpose

For lay leaders and their new clergy to share their habits, norms and expectations so that differences can be openly discussed and resolved.

Theological Understanding

The young Christian community encountered differences of ritual and understanding when it sent missionaries to the Gentiles. God worked through his messengers and prophets to come up with solutions to these potentially divisive differences. The first step was to be able to talk about the differences and why they existed. When a new clergy person enters a congregation lay leaders and staff need to be able to openly identify congregational habits, norms and expectations and to negotiate changes if needed. Open communication and prayer can help prevent misunderstandings and hurt feelings.

Note: *Use of an outside facilitator is strongly recommended to help keep the discussion on track and enable renegotiation of expectations if needed.*

A word of caution: *This approach should not be used in a conflicted congregation or where there is an indication that significant problems exist between new clergy and lay leaders. If this is suspected, it may be appropriate to bring in a conflict consultant.*

Prior to Session

Decide whom to invite: Several conversations around expectations may need to occur, each with a different set of people. The Vestry would logically be the first group to invite, followed by staff, and then other key lay leaders (committee chairs, etc.). A conversation with the Search Committee or Transition Team is another possibility. To find out about the facilities, you might want to do a “walk around” version of this conversation with the buildings and grounds committee, learning the history of the building and what meaning is given to various elements of its design and furnishing.

Pick a time and format: This topic lends itself to a structured conversation. Find a comfortable place for people to sit around, sharing their stories and expectations. Try to find a place that is neutral – NOT the rector’s office! Allow at least two hours for the conversation.

Find a facilitator: Your congregation’s search consultant or other congregational consultant or the rector of a nearby parish (especially someone who has been through **Fresh Start** and has participated in the module on *Habits, Norms and Expectations*) are all good possibilities.

Invite participants

Copy the questions on a handout, if desired, and gather supplies: You will need a flip chart easel to record agreements reached. If you decide to provide the prompting questions in a handout, you will need sufficient copies for all participants as well as pens or pencils.

At the Session

Arrange comfortable chairs in a circle with an opening for the facilitator and flip chart where everyone can see.

Agenda (suggested times shown in parentheses):

1. Opening prayer and meditation – suggested reading Acts 15:4-11. (5 minutes)
2. Introduction to concept of habits, norms and expectations and their sources. (5 minutes)
3. Looking at liturgy, worship and music – what are the norms? Handout 1 (25 minutes)
4. Looking at programs and structure – what are the norms and routines? Handout 2 (25 minutes)
5. Introduce concept of expectations. (5 minutes)
6. What are our expectations of each other? Handout 3 (40 minutes)
7. Discussion of differences – what do we want to do? (20 minutes)
8. Wrap up with agreements and a final prayer.

Appendix 3 – Habits, Norms and Expectations Guidance for Facilitators

Talking Points and *Instructions*

**Habit is habit and not to be flung out of the window by any man,
but coaxed downstairs one at a time.**

Mark Twain

<p><u>Introduction</u></p> <p>The young Christian community encountered differences of ritual and understanding when it sent missionaries to the Gentiles. God worked through his messengers and prophets to come up with solutions to these potentially divisive differences. The first step was to be able to talk about the differences and why they existed. So too, when a new rector or assistant enters a congregation we can encounter differences in routines and expectations. For the new relationship to work we need to be able to openly identify congregational habits, norms and expectations and to negotiate changes if needed. Open communication and prayer can help prevent misunderstandings and hurt feelings.</p> <p>Congregations (like any organization) have certain things that define them – ways of doing or being that people want to remain constant. Sometimes these are deeply and obviously meaningful to an outsider such as being a historically black parish or having a reputation for outreach which is defined by a long-standing program</p>	<p><i>You may wish to post the above Mark Twain quote on a flip chart.</i></p>
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of feeding the homeless. Sometimes the “norm” is less readily apparent or at least its significance is – for example using pita bread instead of wafers for communion. Regardless, attempts to change any of these routines – even when change is warranted – will meet with resistance.

Often these habits, norms and expectations are unspoken. Therefore, as a newcomer it is easy to inadvertently step on some of these beloved traditions.

In addition, clergy have their own habits, norms and expectations – and they may not be visible or known to the members of the congregation. When the new clergy person’s habits, norms and expectations collide with those of the congregation (or individual members) misunderstandings can arise.

Traditions (e.g., the Christmas pageant, the Easter sunrise service) are an important – and often visible – source of “the way things are done.”

History’s contributions to norms may be more obscure – the use of the modern form of the Lord’s Prayer, for example, might have come from a gifted previous rector’s teaching at the time of the Prayer Book revisions and the congregation may cling fiercely to that bit of liturgical history.

The sources for routines and expectations are even more hidden – routines because everyone simply “knows” that is how things are done (and written documentation is sparse) and expectations because people often don’t express them clearly.

A routine might have grown up, for example, around the rector buying the pita bread for communion on his way to church on Sunday morning (but no one tells the new rector about that until AFTER the first Sunday when no bread is available!). Or people might expect the rector to regularly attend all the adult education programs – and be hurt when the new rector doesn't show up.

Some assumptions are tied into people's sense of worth or power in the congregation. Knowing that Mrs. Smith has ALWAYS organized the annual parish dinner is an important fact to be aware of before appointing your first annual dinner committee!

Describe one tradition, custom or routine that you are aware of. What is the origin of that tradition, custom or routine?

Changes in liturgy and worship, music, programs and structure are the ones most likely to bump against habits and norms in a congregation. So let's look at these areas.

Liturgy/Worship/Music

Liturgical habits involve things like which rites are used, how formal or informal the service is, etc. What happens during worship? Are congregants casually or more formally dressed? Are there a lot of body movements or call and response during the service? How is the space arranged? Does it get adapted for different uses? To what extent does the space reinforce the formality or casualness of the service? Do people talk before and/or after the service? How participatory is the worship? Who

participates – everyone or just a select few? Are children involved in the service and, if so, how? Are there special traditions around given feast days (a patron saint’s festival, an Easter sunrise service, Christmas pageant) – what are they?

Closely related to liturgy and worship is music. What style of music is used? How many choirs are there? Who participates in them? What about instruments? Is there diversity of style among worship services or within a given service? Are there special traditions (e.g. a trumpet-led parade on Rogation Sunday)?

Programs and Structure

Looking at the types of programs, how committees are structured, and who participates in both governance and the program activities will tell you more about a congregation’s habits and norms. What kinds of programs for Christian formation, outreach, and social activities seem to “have a life of their own”? How are they organized? Who participates on the committees? Who participates in the programs – are there assumptions about participation or membership? Are certain people “always” in charge of some events? Do assignments to head certain activities or committees rotate or are people there “for life”?

Distribute Handout 1 and ask participants to jot down their responses, then share them

Or

Use questions in handout to lead a discussion.

Distribute Handout 2 and ask participants to jot down their responses, then share them

Staff

Members of a parish staff are used to the management style of the previous clergy person. Established norms around schedules (including vacation, sick leave, and other time off), duties, and degree of authority all create what are called “working conditions and environment.” Less formal habits such as the degree of familiarity in speech (is everyone called by his/her first name?), casualness of dress, and extent of collegiality in working relationships also form part of the office culture. Some parishes have very strict rules about members NOT being part of the paid staff – others are more relaxed in their attitudes toward this issue.

Expectations

Both clergy and lay leaders have expectations of each other regarding how work gets done – and some of these expectations are viewed as non-negotiable. For example, is it assumed that the rector will be present at all parish social gatherings? Do clergy expect lay leaders to do written reports and provide handouts at the annual meeting? Does the clergy person expect parishioners to make an appointment, and their pattern is to simply “drop in”?

Or

Use the questions in the handout to lead a discussion.

Distribute Handout 3 and ask participants to jot down their responses and then share them.

Or

Use the questions in the handout to facilitate a general discussion.

<p>Comparing these lists, are there any surprises? What is the same? What is different? What questions do you have for each other? Are there some expectations that need to be renegotiated?</p>	<p><i>Distribute Handout 4 and ask lay leaders to complete Part I and the new rector/assistant to complete Part II. Lay leaders should do a quick list individually, then come up with a combined list. After the lists are complete, have the lay leaders share their combined list while the clergy person listens, then have the clergy person share his/hers.</i></p> <p><i>Facilitate a renegotiation, if needed. Be sure to capture any agreements or “next steps” on a flip chart. Then close with a prayer.</i></p>
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Habits, Norms and Expectations Handout 1

Liturgy, Worship, and Music

Which Rites are used? How formal and how long are the services? Is there diversity of worship or music style among worship services or within a given service?

Are there a lot of body movements or call and response during the service?

How is the space arranged? Does it get adapted for different uses? To what extent does the space reinforce the formality or casualness of the service?

What style of music is used?

How many choirs are there? Who participates in them? What about instruments?

Are congregants casually or more formally dressed? Do people talk before and/or after the service?

How participatory is the worship? Who participates – everyone or just a select few? Are children involved in the service and, if so, how?

Are there special traditions around given feast days (a patron saint's festival, an Easter sunrise service, Christmas pageant) – what are they?

What else do you have to share about habits, norms or expectations related to liturgy, worship and music?

What is the history or story behind some of these habits, norms and expectations? How long-standing are they?

Habits, Norms and Expectations Handout 2

Programs and Structure

What kinds of programs for Christian formation, outreach, and social activities seem to have a “life of their own”? How are they organized?

Who participates on the committees?

Who participates in the programs – are there assumptions about participation or membership? Are certain people “always” in charge of some events?

Do assignments to head certain activities or committees rotate or are people there “for life”?

What else do you have to share about habits, norms or expectations related to programs and structure?

What is the history or story behind some of these habits, norms and expectations? How long-standing are they?

Habits, Norms and Expectations Handout 3

Staff

What policies are in place regarding staff schedules? What about vacation time and sick leave benefits? Are letters of agreement or contracts current?

How much authority are staff members given to make decisions on their own? Are the limits of authority stated in writing?

What about the climate of the office – is it formal or informal? How do people address each other? By first name? By title and surname? Is there a dress code? If so, what is it – formal or informal?

What are the expectations for collegial relationships? Are there regular staff meetings or other opportunities for staff members to share what they are doing?

Does the parish have a policy prohibiting members from being part of the paid staff? Is this policy written? Is it widely understood? Is it followed?

Habits, Norms and Expectations Handout 4

Expectations

Part I: For lay leaders to complete

A. What expectations do you have for yourself regarding your position in the congregation? Consider expectations around:

- Your availability
- Attendance at worship
- Attendance at non-liturgical functions
- Timeliness in response to calls, etc.
- Other?

B. Thinking about your new rector/associate, what expectations do you have of him/her? Consider expectations around:

- His/her availability
- Attendance at non-liturgical functions
- Timeliness in response to calls, etc.
- Pastoral care
- Other?

Part II: For new rector or assistant to complete

A. What expectations do you think your congregation holds of you? Consider expectations around:

- Your availability
- Attendance at non-liturgical functions
- Timeliness in response to calls, etc.
- Pastoral care
- Other?

B. Thinking about your lay leaders, what expectations do you have of them? Consider expectations around:

- Their availability
- Attendance at worship
- Attendance at non-liturgical functions
- Timeliness in response to calls, etc.
- Other?

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Appendix 4

Role Clarity

Purpose

To help participants understand the role expectations, both formal and informal, placed on them by their congregation and to assess the impact of the congregation's culture and history on these expectations.

Theological Understanding

An individual's ministry relates to the role(s) assumed in a congregation. Throughout Scripture people face role expectations of others that may or may not be aligned with their expectations of themselves. Moses argued with God that he was not the one to lead the Israelites out of Egypt. Esther initially refused Mordecai's plea to intercede with Xerxes. Even Jesus checks out other's expectations when he asks "Who do people say that the Son of Man is?" (Matthew 16:13). Most Biblical scholars would assert that Jesus was a disappointment to many of his followers because he failed to be the traditional notion of "messiah" they wanted him to be. Yet Jesus was crucified by the Roman authorities in large measure because this messianic "role" had been attributed to him and, as such, he was a threat. Jesus assumed many other "roles": Son of Man, Good Shepherd, forgiver of sins, rabbi/teacher, Lamb of God, healer. For some roles he was praised and beloved; for others, he was faulted and despised. Congregational leaders are similarly praised and criticized for the roles they play and the roles they fail to play. Understanding one's role in a community is essential for effective leadership and ministry.

Note: *Having an outside facilitator would be helpful. The Ministry Specialties Exercise requires preparing a set of cards for every participant prior to the session.*

Prior to Session

Decide who to invite: This is a particularly good exercise to do with your vestry – it provides a fun and easy way to share role expectations. Lay leaders, like clergy, can sometimes feel overwhelmed by all the roles they are asked to play – this provides them an opportunity to share some of those feelings with you as well as hear your expectations.

Pick a time and format: Because space is needed for laying out the Ministry Specialty Cards and writing lists, provide plenty of table space and comfortable tables. Allow at least two and a half hours for this conversation.

Decide whether to use a facilitator: An outside facilitator makes it easier for you to participate and pay attention to what is being said, but is not absolutely necessary. Your congregation's search consultant or other congregational consultant, or the rector of a near-by parish (particularly someone who has participated in the **Fresh Start** module on *Role Clarity*) are all possibilities.

Invite participants

Copy handouts and gather supplies: You will need a set of Ministry Role cards (including the priority and importance header cards) for each participant. You will also need pads of paper, pencils or pens, and sufficient copies of the other handouts for each participant.

At the Session

Arrange the space so that everyone has plenty of room to write and spread out their cards.

Agenda (suggested times shown in parentheses):

1. Opening prayer and meditation – suggested reading: Esther 4 or Matthew 16:13-15. (10 minutes)
2. Introduce concept of role – see talking points. (5 minutes)
3. Role List Exercise – Handout 1. (20 minutes)
4. Share lists – ask questions for clarification; are there any surprises? (10 minutes)
5. Ministry Role Exercise – Handout 2. (15 minutes)
6. Share lists using questions on Handout 2. (20 minutes)
7. Introduce concept of impact of culture – see talking points. (5 minutes)
8. Assess impact of culture – Handout 3. (20 minutes)
9. Share observations. (20 minutes)
10. Overview of how to prevent misunderstandings – see talking points. (5 minutes)
11. Closing prayer

Appendix 4 – Role Clarity Guidance for Facilitators

Talking Points and *Instructions*

Note: Talking Points are written for an outside facilitator.

<p><u>Role</u></p> <p>Understanding the roles that we play in the congregation is essential for effective leadership and ministry. There are two kinds of roles: those that we are specifically asked to play (e.g., rector, warden, chair of outreach) and those that we may be unconsciously expected to play. Since it is very difficult to fulfill expectations that are unspoken, it is important to be as clear as we can with each other about our role expectations.</p> <p>Roles define who we are in the congregation. They may be positions to which we are assigned or elected or they may be earned because of our personal credibility, expertise, or performance.</p> <p>Role differs from task – it is who we are, not what we do. So let’s take a look at the various roles we play in the congregation.</p> <p><u>Ministry Specialties</u></p> <p>As part of the search process, both clergy candidates and search committees identify “gifts and skills” they have or are seeking in a new</p>	<p><i>Distribute Handout 1 – lay leaders can brainstorm as a group; clergy should complete the lists individually. Then have them share the lists with each other – are there similarities? Differences? What is a surprise? Ask questions for clarification and understanding.</i></p>
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rector. While some of the things listed are personal characteristics, many of them are roles the rector is expected to play. There are similar expectations of lay leaders, at least for some of the roles.

Here is a set of cards with some of those ministry specialties listed. Follow the instructions on the sheet, remembering to write down your lists each time before resorting the cards.

Congregational Culture

The Ministry Specialty cards cover formal roles, but we are often asked to play informal ones as well – for example, a Lutheran pastor has come up with the following informal roles:

- **Cheerleader:** being voice of optimism and hope in congregation.
- **Prophet:** speaker for social justice.
- **Ambassador:** representative of congregation in the broader community.
- **Blessed Presence:** being there in times of tragedy or crisis in community or even just at important events such as high school graduations.

Distribute Handout 2 – you may want to go over the instructions with them. Everyone should do the exercise individually and be prepared to share what was important and what has priority. Once everyone has completed the exercise, share the individual responses and facilitate a conversation using the questions at the bottom of the instructions as prompts.

<ul style="list-style-type: none"> • Midwife: instructing and accompanying congregational members through major life passages. • Ritual Maker: beyond being a sacramentalist, developing rituals marking personal or community activities (e.g., commemorative events). • Role Model: serving as a model of restraint, wisdom, and compassion at all times. • Activities Director: organizer of activities to engage the congregation. • Curator of Tradition: preserve the catholic and apostolic tradition in worship, be experts on Anglicanism and the Episcopal Church. • Keeper of the Story: keeper of the divine story, but also of the personal stories of members, and of the congregation's own story. • CEO: person ultimately responsible for the entire operation of the congregation. • One of Us: being part of the everyday world and life of the congregation's members, • Corporate Therapist: identifying and equipping congregation to deal with unhealthy aspects of congregational life.¹ <p>Can you think of others? Are any of these roles that people play in this congregation? Are any of them important? Are there subgroups within</p>	
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the congregation who have different expectations of roles (for example, some ethnic groups cede greater authority to people with positional power)? Take a few minutes to think about some of these questions and then let's discuss.

Dealing with disagreement

“Role” is a two-way arrangement. In order for a role to be lived out, the person with the role AND the system in which the role exists must agree to the “contract.” Any role is an agreement between the one who exercises it and the community which commissions it. So trouble can develop when there is disagreement about that contract. I would hope that you can keep talking about roles, asking questions, and giving each other feedback when something doesn't feel right. What ideas do you have for continuing the conversation?

Distribute Handout 3 – clergy complete theirs individually, but the lay leaders work on their responses as a group. When completed, ask them to share what they have jotted down. What have/did they learn? What surprises are there?

Thank people for coming and dismiss with a prayer or blessing.

¹Informal role titles and definitions adapted from “Expectations of Pastoral Ministry” by James Kasperson, in Pastor and People: Making Mutual Ministry Work, Minneapolis, MN, Augsburg Fortress, © 2003 (pp. 30-40), and used by permission of the publisher. All rights reserved.

Role Clarity Handout 1

Clarifying Roles

If you are the clergy person –

- a) Brainstorm a list of roles that you are asked to play.
- b) Brainstorm a list of roles you ask/expect lay leaders to play.
- c) Be prepared to report out both lists.

If you are a lay group –

- a) Brainstorm a list of roles lay leaders are asked to play.
- b) Brainstorm a list of roles you ask/expect clergy to play.
- c) Be prepared to report out both lists.

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Role Clarity Handout 2

Instructions for Ministry Role Exercise Clergy/Lay Version

1. **Look at the deck of Ministry Role cards.** Do they capture all the roles you are asked to play? If not, take some of the blanks and write new cards before continuing.
2. **Lay out the following three header cards:**

Most Important

Important

Nice to Do

Thinking about the roles the clergy person is asked to fill, sort the cards under the three categories. You may put **no more** than 5 cards under “Most Important,” and no more than 7 cards under “Important.” All cards that contain a role the clergy person is expected to play **must** be distributed. Once the cards are sorted, write down the lists under each heading. *Note: If you are the clergy person you are thinking about yourself and the roles you are expected to play. If you are a lay leader, you are thinking about the roles you expect the clergy person to play.*

Pick up the cards and thinking about the roles lay leaders are asked to play, resort the cards under the three headings. You may put **no more** than 5 cards under “Most Important,” and no more than 7 cards under “Important.” All cards that contain a role lay leaders are expected to play **must** be distributed. Once the cards are sorted, write down the lists for lay leaders under each heading. *Note: if you are a lay leader, you are thinking about yourself and the roles you are expected to play. If you are a clergy person, you are thinking about the roles you expect lay leaders to play.*

Put the “Importance” header cards to one side.

3. **Now lay out the following three header cards:**

Top Priority

Secondary Priority

If I Have Time

Thinking about *yourself* and the roles you are expected to play in your congregation, where do you spend your time? Again, sort the cards, placing **no more** than 5 cards under “Top Priority,” and no more than 7 cards under

“Secondary Priority.” All cards that contain a role you are expected to play **must** be distributed. Once the cards are sorted, write down the lists under each heading.

- 4. Compare your lists:** first, for the roles the clergy person is expected to play; then for lay leaders; and finally which roles are given priority and time. Are you in agreement? Or are there differences in how people view each other's roles or priorities? What is given low priority or importance? Do these things need to be done? Are there others who are fulfilling these roles in your congregation?

Administrator	Director of Christian Formation/Education	Church Developer
Counselor	Crisis Responder	Ecumenical Leader
Evangelist	Liturgist	Musician
Facilities Manager	Outreach Worker	Pastor
Preacher	Community/Civic Leader	Spiritual Director
Fund Raiser	Teacher	Theologian
Change Agent	Visitor to Sick and Shut-ins	Youth Worker

Communicator	Developer of Leadership	Multi-cultural Specialist
Advocate for Social Justice		

MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO
MOST IMPORTANT	IMPORTANT	NICE TO DO

TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME
TOP PRIORITY	SECONDARY PRIORITY	IF I HAVE TIME

Role Clarity Handout 3

Congregational Culture

What informal roles did the previous rector/associate play (see suggestions on back)?

Which of these were viewed as important?

Is the expectation that the new rector/associate would play these same roles? How has this been communicated?

Are there cultural, ethnic or economic subgroups in your congregation that have different expectations of the role of the clergy? What are these different expectations?

What has surprised you about your own, the congregation's and the new rector/associate's role expectations?

Sample Informal Roles

- **Cheerleader:** being voice of optimism and hope in congregation.
- **Prophet:** speaker for social justice.
- **Ambassador:** representative of congregation in the broader community.
- **Blessed Presence:** being there in times of tragedy or crisis in community or even just at important events such as high school graduations.
- **Midwife:** instructing and accompanying congregational members through major life passages.
- **Ritual Maker:** beyond being a sacramentalist, developing rituals marking personal or community activities (e.g., commemorative events).
- **Role Model:** serving as a model of restraint, wisdom, and compassion at all times.
- **Activities Director:** organizer of activities to engage the congregation.
- **Curator of Tradition:** preserve the catholic and apostolic tradition in worship, be experts on Anglicanism and the Episcopal Church.
- **Keeper of the Story:** keeper of the divine story, but also of the personal stories of members, and of the congregation's own story.
- **CEO:** person ultimately responsible for the entire operation of the congregation.
- **One of Us:** being part of the everyday world and life of the congregation's members.
- **Corporate Therapist:** identifying and equipping congregation to deal with unhealthy aspects of congregational life.¹

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