"Try to balance idealism and realism. Be sensitive to others. Rely on prayer. God has a purpose for you and for your parish. You cannot accomplish it alone. God’s grace is always sufficient but God calls us and empowers us to respond intelligently and effectively. As with so many things in life, there is usually a relationship between the investment you make and the return you receive."

- The Vestry Handbook, Christopher Webber

I. SPIRITUAL LEADERSHIP
   - Prayer & scriptural reflection
   - Outward focused
   - Seeks reconciliation
   - Practices sacrifice & responsibility
   - Builds trust
   - “Do not be afraid”

II. HEALTHY COMMUNICATION
   - Personal emotional health - the vestry cannot spend time and energy managing emotions
   - No Triangulation - use direct lines of communication
   - Complain upstream - address issues with those who can help problem solve
   - Non-anxious presence

III. EFFECTIVE PRACTICES
   - Listen, listen, listen
   - Introduce new ideas, educate, listen, reflect
   - Formation - Information - discussion - decision
   - Transparency
   - Training and orientation
   - Say thanks!

IV. RESPONSIBILITIES
   - Finances & Stewardship
   - Buildings & Grounds
   - Spiritual Vitality
   - Commitment
   - Vision, Values, Mission
   - Decision making
   - Know canons, bylaws, and policy

Embracing Christ, Engaging the World
Notes on Congregational Leadership
_Culled from "Beyond Business As Usual"

8 PRINCIPLES OF LEADERSHIP
Relationship between Rights & Responsibilities
Never throw gasoline on a fire
Avoid triangulation
Complain upstream

Healthy community allows for ministry
Growth comes from developing leaders
Weakest/Strongest Link
Future more exciting than past

"THINK DIFFERENT"
Effective leaders ask questions; effective leaders exercise commitment. They think differently. A reflected life. More leadership means more time in reflective thinking and prayer. Effective leaders are responsible to and for others and spend time earning trust. Effective leaders know that transactional leadership needs to shift to transformational leadership.

4 COMPONENTS OF LEADERSHIP THINKING:
Define current reality.
Account for what is happening. Know the story.
Know where organization is headed.
Make plans, hold people accountable, bless the people.

HELPFUL REFERENCES:
Beyond Business As Usual: Vestry Leadership Development, Neal O. Michell The Vestry Handbook, Christopher Webber Doing Holy Business: The Best of Vestry Papers, Lindsay Hardin Freeman, ed.

Embracing Christ, Engaging the World
Why Organizations Fail
Included in “Beyond Business As Usual”

ERROR #1: ALLOWING TOO MUCH COMPLACENCY.
In Other Words: Establish a sense of urgency.
♦ Identify crises, potential crises, or major opportunities that can create urgency
♦ Balance between “gloom and doom” and “we’re doing just great.”

ERROR #2: FAILING TO CREATE A SUFFICIENTLY POWERFUL GUIDING COALITION.
In Other Words: Create a team that works together.
♦ Identify and establish a group with enough influence, confidence, capability, and expertise to lead the change effort, inspire trust, and function well as a team.
♦ Distinguish between “characters” and “leaders.”

ERROR #3: UNDERESTIMATING THE POWER OF VISION.
In Other Words: Develop a strong and compelling vision.
♦ Do you have a vision that people will sacrifice for?
♦ Vision unites, plans divide.

ERROR #4: UNDERCOMMUNICATING THE VISION BY A FACTOR OF 10 (OR 100 OR EVEN 1,000).
In Other Words: Communicate the vision of change.
♦ Use every method possible to communicate — continually.
♦ Leadership must model the expected behavior.

ERROR #5: PERMITTING OBSTACLES TO DERAIL THE NEW VISION.
In Other Words: Empower positive action.
♦ Empower people to implement the vision by removing obstacles to its implementation.

ERROR #6: FAILING TO CREATE SHORT-TERM WINS.
In Other Words: Start with short-term wins before you attempt bigger risks.
♦ Plan specifically to create visible improvements or wins within six to eighteen months of launch.
♦ Provide public recognition and rewards to those who have participated in the wins.

ELEMENTS OF A VISION
♦ Provides a future picture of the organization
♦ Appeals to long-term interests of stakeholders
♦ Is clear enough to guide decision-making
♦ Is general enough to permit individual initiative
♦ Is easy to communicate

VISION COMMUNICATIONS PRINCIPLES
♦ Use metaphors, analogies, and examples
♦ Tell stories
♦ Use different forums to communicate vision
♦ Lead by example
♦ Listen and be listened to
♦ Address seeming inconsistencies between vision and actions
♦ Repeat, repeat, repeat

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EMPOWERMENT PRINCIPLES

♦ Restructure whenever necessary to remove structural barriers
♦ Provide skills training necessary to implement the vision
♦ Align performance evaluation, compensation decisions, promotions, and recruiting and hiring systems
♦ Encourage risk-taking and non-traditional ideas, activities, and actions
♦ Confront those in authority who undercut the change that is needed

ERROR #7: DECLARING VICTORY TOO SOON.
In Other Words: Consolidate change and produce more change.
♦ Use the increased credibility derived from earlier changes to drive deeper change.

ERROR #8: NEGLECTING TO ANCHOR CHANGE IN THE CORPORATE CULTURE.
In Other Words: These changes mustn't be based simply on the leader's personality.
♦ Anchor change (new goals, attitudes, behavior) in the culture of the organization (i.e., its social norms and shared values). Consequences of Failing to Lead Healthy Change
♦ New strategies aren't implemented well.
♦ Acquisitions don't achieve expected synergies.
♦ Reengineering takes too long and costs too much.
♦ Downsizing doesn't get costs under control.
♦ Quality programs don't deliver hoped-for results.
Leadership needs to know the dynamics of congregational size. Churches in between sizes will find themselves uncomfortable as they transition. Each has particular characteristics of the role of leadership, congregational life, and church growth. It is very difficult to move to a larger size, and easy to return to a smaller size. Be careful not to apply larger church characteristics than your size needs. You will find yourself ‘overorganized.’ (ASA = Average Sunday Attendance)

The original study of church size dynamics comes from Arlin Rothauge and Kevin Martin.

FAMILY-SIZE CHURCH | 3-75 ASA |
usually in smaller towns, one or two extended families as members who are center of influence; strength is it's intimacy; weakness is low expectations; finances are often an issue.

Congregation life: 'everybody knows everybody'; few formal structures; best to adopt one major mission or outreach project

Leadership: ordained person is not the real leader, but a chaplain providing pastoral care; decisions made by long-standing members; vestry defers to matriarch or patriarch and will reverse itself to please m/p; 2-8 leaders; success = 'keeping the doors open'; clergy must consult with m/p behind scenes to be effective

Growth: newcomer invited to fellowship and introduced to m/p; must feel accepted by ongoing members

PASTORAL-SIZE CHURCH | 76-140 ASA |
Pastor is leader; single cell; all recognize each other, notice newcomers; intimacy, sense of belonging and family

CL highly relational; worship service is primary; strength = stability, people feel cared for, if property well-maintained this can be sustained; individuals can rise in leadership; equal access to pastor; weakness = predictability; generic and small programs; don't expect challenging music program; youth group will be a bible study; “what did we do last year?”; budget stays the same; leaders are tired; can easily become ingrown; Must have identifiable mission and outreach project that unifies congregation, limiting other endeavors; can’t compete with larger neighbors, so it should do it’s thing with excellence. “do small things well.”

L priest is center of activities; gives opinion on all details; prays before gatherings; primary evangelist; 8-25 leaders; tempted to organize as larger church; vestry = unpaid staff; if vestry only makes decisions and doesn’t work, pastor will be overworked and church will never transition.

G dependent on energy of the pastor; if newcomers don’t get connected with others, they will leave when pastor leaves. Must incorporate new members beyond Sunday worship. Caution: plan for long-term ministries rather than trying new things and not following through.

TRANSITIONAL-SIZE CHURCH | 120-250 ASA |
Not a natural size. This congregation will have tension: internal pressure to preserve intimacy, external pressure to provide quality programming; adolescent in a growth spurt; Must have proper guidance and appropriate changes at various levels or it will revert to pastoral-size.

Embracing Christ, Engaging the World
CL 75% pastoral / 75% program...lots of needs and interests, but not enough critical mass

L 3 fold: non-anxious presence, vision caster, leadership development. Pastor must move from primary provider to being the developer of leaders. Vestry moving from unpaid staff to vision-casting, policy-enabling board. Must become a staff-run church.

G the small things: adding staff, providing resources, clean, crisp. Incorporation must become formalized. Shift from pastor-focused to lay-led, program based process of incorporation. “Ricochets.” Prayerful, strategic expansion with necessary support.

PROGRAM-SIZE CHURCH | 225-450 ASA |

Programs are primary; know same number of people as in a pastoral size church; Trained and fairly paid staff who function well.

CL lived out in sub-groups; wide-ranging

L pastor pastors the leaders, develops, shares in visioning, administration; don't expect hospital visit except in real crisis; spends time planning with staff and lay leaders, recruiting, facilitating, overseeing. Hard for members of smaller churches to adjust.

G through programmatic offerings; classes, gatherings, many ‘side-doors’

RESOURCE-SIZE CHURCH | 451+ ASA |

excellence; top-notch facilities; well-done music; clean, neat, trained nursery personnel

CL large, professional staff; much room for advancement for lay leaders; often hires lay leaders; specialized programs offered to smaller subgroups; made up of smaller congregations within one church

L Senior pastor is like president of a university, managing deans and staff, diversity, must be able to articulate unique vision of the congregation; motivator, vision-bearer, communicator, symbol of unity, stability and energy. Vestry must focus on ever-expanding mission. If not expanding>plateau>decline. Decline is hard to see until it creates a crisis.

G programmatic offerings; safe place for exiles; incorporation key otherwise newcomers fall through the cracks and disappear.
Vestry Leadership: The Energy/Vision Cycle
Managing “Business” w/ the Energy of a Shared Vision
A handout for Vestry leadership training prepared by The Rev. Canon Jason D. Lewis

**MANAGEMENT**
- Runs the A and P
  - Reduces Risk
  - Plans and Prepares
  - Roles and Responsibilities

**LEADERSHIP**
- Engaged
- Knows E/V
- Embodies E/V
- Looks to the Future
- Sees Potential
- Takes Risks
- Inspires & Motivates
- Action in the Congregation (I)

**KEY PRINCIPLES:**
- Leadership knows the E/V of the congregation and its ministries (P - programs)
- Leadership can articulate the E/V in a compelling way that builds I within the congregation
- Leadership ensures movement from E/V, to I, before launching new P or continuing existing P
- Do not administer (A) programs (P) for which no one can answer the E/V and for which there is decreased I (KEY: don’t run the cycle backwards)
- Effective Vestries have a strong balance between Management and Leadership (A w/ E/V)

**ENERGY:**
- The “Why”?
- Working Now
- Life-Giving Now
- Valued Now
- “Felt” Dynamic that Creates “Energy”

**VISION:**
- Vivid Picture of “More of”
- Aspired for in the Future
- Compels, Motivates, Inspires
- The Desired “What” that exists “Out There”

**INTEGRATION (I)**
- The “Who”?
- Sharing the E/V
- Bringing others “IN”
- Building “Buy-in”
- Broadening the shared E/V

**MANAGEMENT**
- Program (P)
  - “What” You Do
  - Programs, Ministries, Events, Behaviors, Gatherings, Use of Assets, “Products”

**ADMINISTRATION (A)**
- “How” You Do It
  - Timelines, Budgets
  - Managing Resources
  - Order, Structure

**LEADERSHIP**
- Key Principles:
  - Leadership knows the E/V of the congregation and its ministries (P - programs)
  - Leadership can articulate the E/V in a compelling way that builds I within the congregation
  - Leadership ensures movement from E/V, to I, before launching new P or continuing existing P
  - Do not administer (A) programs (P) for which no one can answer the E/V and for which there is decreased I (KEY: don’t run the cycle backwards)
  - Effective Vestries have a strong balance between Management and Leadership (A w/ E/V)
Leading and Creating Change (using AI as a resource)

The A to B change model focuses on the design, implementation and achievement of desired, sustainable goals. (Note: these materials are based on resources from the Clergy Leadership Institute)

Basic $A \rightarrow B$

1. What is life-giving now?
2. What do we want more of?
3. How are we going to get there?

Change Fractal

Contrary to most popular thinking, we don’t need to know why or how we got to $A$ in order to make changes in our life. We need to focus on where we are going rather than where we have come from. The following guidelines are essential to achieving our goals.

Goals need to be **positive**.
We cannot become happy by being less miserable.

Goals need to be **valued**.
We will not put effort into an outcome that we don’t value.

Goals need to be **imaginable**.
We cannot achieve what we cannot imagine.

Goals need to be **resourced** and **perceived as worth** the resources.
We cannot achieve our goals if we don’t have the resources.

Goals need to be **ecological**.
We need to satisfy our objections to the goal rather than overcome them for our goals to be sustainable over time.

Goals need to be **just**.
Others cannot be disadvantaged as our goal is achieved.

Goals need to be **increase freedom**.
We will resist goals that limit choice and options.

Goals need to be **sold to and owned** by those working on them.
In group situations all the members need to own the goal. Externally imposed goals will be resisted. For change to be sustainable it has to be an “inside job.”

The path to the goal needs to be **consistent** with the goal.
Both the journey and the outcome must be consistent with the our values and core purpose. We cannot fight for peace.

Achieving the goal won’t make you loveable.
The love and self-acceptance we have at $A$ is the power we use to get us to $B$. 
**Assumptions of Appreciative Inquiry**

1. In every society, organization, or group, something works.
2. What we focus on becomes our reality.
3. The experience of reality is created in the moment, and there are multiple experiences of reality.
4. The act of asking questions of an organization or group influences the group in some way.
5. People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past with them.
6. If we carry parts of the past forward, they should be what is best about the past.
7. It is important to value differences.
8. The language we use creates our reality.
9. At any given moment people are doing the best they know how to do in that context at that time.
10. The deepest longing of the human heart is for acceptance. The only change outcomes that will be sustainable are those that result from greater self-acceptance.

Alienation is humanity's core injury.
   a. alienated from our self, our capability and our potential.
   b. alienated from our neighbor.
   c. alienated from the Source of our existence.

If alienation is the problem, acceptance is the cure.

*From the Thin Book of Appreciative Inquiry, Copyright, 1996 Sue Hammond*