Leading in a Liminal Season

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Workshop Objectives

What do you do when you are stuck between something that has ended and a new thing not yet born. You don’t fully understand where you are or where you are headed.

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

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

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

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

What You Will Experience:

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

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

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

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

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

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

Present usage stems from the field of anthropology:

- Arnold Van Gennep (1909) *Les Rites de Passage.*-rituals in small-scale societies.

- Victor Turner (1960’s): Expanded usages of the term to the social, political and behavioral sciences.

**Liminality always involves a three-part transition structure:**

1. **Separation:** A period in which a person, group or social order is stripped of the identity, social status and structure that previously limited and defined.

2. **Liminal Period:** A disorienting period of non-structure or anti-structure that opens up new possibilities no longer based on old hierarchies and status. New identities are explored, new possibilities considered. (The focus of this workshop.)

3. **Reassimilation:** A reforming period in which the person, group or social order adopts a new status and structure more appropriately suited to a changed environment or an emerging identity.
Liminality in Organizations

**Liminal Contexts:** Pilgrimage, Mission Trips, Summer Camp

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

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

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

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

*Thesis:* Many of the organizations we are leading have exceeded their liminal tolerance. Leading well in liminality requires a non-traditional presence and a new body of work.
Leading in a Liminal Season

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

Opportunities in a Liminal Season:

- **Communitas**: A state of relationship that occurs in an unstructured community. Hierarchies dissolve. People become equal. The very soul of the community itself emerges. Fellowship, spontaneity and warmth emerge as a new ethos of interrelatedness breaks forth.

- **Innovation**: The organization is more willing to examine, reinvent and take risk as long-established structures and processes unfreeze.

- **Rediscovery of the core**: What matters most to us? Who are we when we are at our best? What will not change about us? What needs to evolve?

- **Cultivating collective wisdom**: How do we know what we know? What do we know and what can we observe beyond our habitual patterns of knowing and doing?

Threats in a Liminal Season:

- **Anxiety rises**: How do we keep anxiety in a productive and useful zone of disequilibrium? What happens if there is too much anxiety?

- **Denial: Powering through** as if nothing has changed. The anxiety moves underground and we revert to status quo behaviors that no longer serve us well.

- **Changing power dynamics**: Leaders who have been at the core often move to the edges and those who have been at the edges move into the center.

- **The emergence of tricksters**: Charismatic figures who look like leaders, but they are incapable of giving and sharing or participating well in a democratic process. Their behaviors are almost always self-serving and they lack deep commitments to the welfare of the organization.

- **Leadership rejection**: When people are anxious they often turn on their leader(s). The leader needs to stay alive to lead another day.
Leading in a Liminal Season

Exploring Three Related Concepts

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

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

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

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

**Institutional Soul-Tending Involves Four Bodies of Work:**

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

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

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

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

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

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

Emergence follows a predictable pattern in liminal seasons: disturbance, disharmony, innovation, coherence, and adoption. We cannot control or manage emergence, but we can lead people through it with an appropriate soulful stance.
Leading with Presence
(Adapting Your Leadership Stance for a Liminal Season)

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

–Margaret Benefiel, Soul at Work
# Traditional Leadership Stance

<table>
<thead>
<tr>
<th>Task</th>
<th>What the leader is expected to do:</th>
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<tbody>
<tr>
<td>Direction</td>
<td>Provide problem definition &amp; solution</td>
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<tr>
<td>Protection</td>
<td>Protect from external threats</td>
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<tr>
<td>Order</td>
<td></td>
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<tr>
<td>Orientation</td>
<td>Orient people to current roles</td>
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<tr>
<td>Conflict</td>
<td>Restore order</td>
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<tr>
<td>Norms</td>
<td>Maintain norms</td>
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Institutional vs. Contemplative Leadership

Are they inherently at odds with one another?

<table>
<thead>
<tr>
<th>Organizational Leadership Traits</th>
<th>Contemplative Leadership Traits</th>
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<tbody>
<tr>
<td>Visionary</td>
<td>Authentic</td>
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<tr>
<td>Strategic</td>
<td>Patient</td>
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<tr>
<td>Decisive</td>
<td>Open</td>
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<tr>
<td>Goal-Oriented</td>
<td>Flexible</td>
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<tr>
<td>Purposeful</td>
<td>Yielding</td>
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<tr>
<td>Future-focused</td>
<td>Present-Centered</td>
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<tr>
<td>Collaborative</td>
<td>Unknowing</td>
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<tr>
<td>Engaging</td>
<td>Trusting</td>
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<tr>
<td>Risk Taking</td>
<td>Discerning</td>
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An **effective organizational leader** doesn’t wait for perfect clarity to emerge, but acts decisively as soon as enough information becomes available. She is certain about herself and the organization’s mission. She brings a strong sense of personal vision and knowing, and acts with conviction to align structure and resources around strategy. Her energy and her passion fuel the work of the whole.

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

God had in mind instead. (My ego self)

The self of unfaithfulness

The Three-fold Journey to Renewal

1. Letting go of the false self, the persona, the mask, the personality we have so carefully crafted, knowing it is not the person God had in mind at our creation, and acknowledging that we have lost our way and cannot find our way back as an act of will.

2. Falling downward into God, where we rediscover the true self, recover our sacred center, reclaim our “true name”, our “self, hidden with God in Christ”;

3. Emerging outward toward living a life more faithful to our truer self, never perfectly or completely, but daily retracing this journey to and through and from our sacred center.

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

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

<table>
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<tr>
<th>From Knowing</th>
<th>To Unknowing</th>
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<tbody>
<tr>
<td>From Advocating</td>
<td>To Attending</td>
</tr>
<tr>
<td>From Striving</td>
<td>To Surrender</td>
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1. **From Knowing to Unknowing:** Traditional practices of leadership invite a leader to apply the best of what they know to an identified problem or challenge.

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

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

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

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

Surrender is a conscious act of acknowledging and welcoming our present reality, for all that it has to teach us and for all of the ways it can mold us. It is not the same thing as giving up.
Releasing That Which Binds Us

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

Shifting the Field of Attention/Awareness

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

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

Releasing That Which Binds Us (Cont.)

Requires Examining Our Blind Spots

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

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

<table>
<thead>
<tr>
<th>Leadership Instruments Available to Us</th>
<th>Capacity Required</th>
<th>Barriers to Engaging</th>
<th>Barrier keeps us locked in the state of...</th>
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<tbody>
<tr>
<td>Open Mind</td>
<td>Intelligence Quotient</td>
<td>Voice of Judgment</td>
<td>Knowing</td>
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<tr>
<td>Open Heart</td>
<td>Emotional Intelligence</td>
<td>Voice of Cynicism</td>
<td>Advocating</td>
</tr>
<tr>
<td>Open Will</td>
<td>Spiritual Intelligence</td>
<td>Voice of Fear</td>
<td>Striving</td>
</tr>
</tbody>
</table>

Three Internal Voices that Create our Blind Spots:

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

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

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

Releasing the Binding Voices

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

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

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

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

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

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

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

-Susan Beaumont

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

Thomas Merton (Hagia Sophia)
Does an Institution have a Soul?

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

Gerald May-The Dark Night of the Soul

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

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

Walter Wink- Unmasking the Powers

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

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

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

-Alice Mann-Befriending the Soul of Place
Soulful Questions for Institutional Leaders

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

Breathe deeply...

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

And then prayerfully consider each of the following questions:

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

Soul & Institutional Charism

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

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

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

The soul of the institution is the agent of divine spark within. The soul is the authentic and truest self of the institution; the source of its divine calling, and character; the protector of institutional integrity.
Discerning the Angel of the Institution

A. Describe the angel of your organization.
   a. Read Revelation 1:1-2. Each of the letters to the seven churches included in the book of Revelation, are addressed to the angel of the church. In the book of Revelation, the “angels” of the churches represent the inner nature, the “within-ness” of a church, the soul, the collective personality.

   b. Invite group members to brainstorm some of the characteristics of the angel (the organization-as-a-person). Record their responses, in writing, on a white board or flipchart at the front of the room. Invite both positive and negative characteristics.

B. Draw the angel.
   a. Begin with 5 minutes of silence, for group members to discern the features of this angel on their own. Invite people to move to a place in the room that allows them to be comfortable in their silence.

   b. Provide each participant with art supplies and blank easel paper. Invite them to create an image of the angel. Advise them to let the colors choose them. The pictures may be abstract or concrete. Encourage people to get over their fear of being judged on their creativity. We don’t care about artistic quality in this exercise.

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

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

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

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

(Continued on the next page...)
Discerning the Angel of the Institution (Cont.)

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

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

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

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

Decision making has its limits. We make decisions.

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

-Danny Morris and Chuck Olsen
Discernment is Not:

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

A political process

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

Decision Making

Discernment Is:

Prayer based

Seeing, knowing, and acknowledging what is

Noticing the movement of the divine

A journey; not a destination

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

Discernment Requires:

Being selective about the number of issues considered

Beginning with corporate and private self-surrender

Clarity about core, scripture-based values and beliefs

Time spent in individual and corporate prayer and deep silence

Seeking consensus before moving forward

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

Recognizing that some are more gifted than others in “distinguishing among spirits”
<table>
<thead>
<tr>
<th>A Deciding Mindset</th>
<th>A Discerning Mindset</th>
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<tbody>
<tr>
<td><strong>Assumptions:</strong></td>
<td><strong>Assumptions:</strong></td>
</tr>
<tr>
<td>• Most problems are solvable if approached carefully and logically</td>
<td>• God is not neutral about our mission or our choices</td>
</tr>
<tr>
<td>• We have the capacity to understand and solve our own problems &amp; embrace our own opportunities</td>
<td>• God is self-disclosing</td>
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<tr>
<td>• Maximizing the use of available resources is important</td>
<td>• The Holy Spirit is our indwelling and ongoing guide</td>
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<tr>
<td>• Maintaining and restoring order is important</td>
<td>• Openness of spirit and attitude is required</td>
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<td></td>
<td>• God’s will is best discerned within community</td>
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<td></td>
<td>• The practice of discernment is ongoing</td>
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<tr>
<td><strong>Process:</strong></td>
<td><strong>Process:</strong></td>
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<tr>
<td>• Defining the problem</td>
<td>• Framing the focus of discernment</td>
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<tr>
<td>• Looking for root causes</td>
<td>• Grounding in guiding principles</td>
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<tr>
<td>• Gathering the data</td>
<td>• Shedding ego &amp; biases</td>
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<tr>
<td>• Interpreting the data</td>
<td>• Rooting in the tradition</td>
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<tr>
<td>• Brainstorming alternatives/options</td>
<td>• Listening for the promptings of spirit</td>
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<tr>
<td>• Establishing decision criteria</td>
<td>• Exploring through imagination</td>
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<td>• Evaluating alternatives</td>
<td>• Weighing options</td>
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<tr>
<td>• Assessing risk and return</td>
<td>• Closing; moving toward selection</td>
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<tr>
<td>• Selecting an optimal solution</td>
<td>• Testing the decision with rest</td>
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<tr>
<td><strong>Tools:</strong></td>
<td><strong>Tools:</strong></td>
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<tr>
<td>• Parliamentary procedures</td>
<td>• Consensus</td>
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<td>• Majority rule</td>
<td>• Prayer</td>
</tr>
<tr>
<td>• Fishbone diagrams/root cause analysis</td>
<td>• Silence</td>
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<tr>
<td>• Decision Trees</td>
<td>• Scripture</td>
</tr>
<tr>
<td>• Decision models</td>
<td>• Listening circles</td>
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<tr>
<td>• Probability Scenarios</td>
<td>• Appreciative Inquiry</td>
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<tr>
<td>• Simulations</td>
<td>• Story Telling</td>
</tr>
<tr>
<td>• Strategy Maps</td>
<td>• Testimony</td>
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<tr>
<td>• Radar charts</td>
<td>• Clearness Committees</td>
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<tr>
<td></td>
<td>• Consolation/Desolation</td>
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<tr>
<td><strong>Who Does the Work?</strong></td>
<td><strong>Who Does the Work?</strong></td>
</tr>
<tr>
<td>• Authorized leaders</td>
<td>• All invested parties</td>
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</table>
The Movements of Discernment

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

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

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

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

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

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

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

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

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

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

Cultivating Wisdom through Consensus

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

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

Working by consensus requires these conditions:

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

Testing for Consensus:

You are NOT asking:
• Is this your first choice of options?
• Do you like this option?
• Does this option satisfy your personal needs?

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

Cultivating Wisdom through Consensus (cont.)

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

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

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

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

Shaping Institutional Memory

God made man because he loved stories.
-Elie Wiesel
The Power of Stories to Bind/Unbind Memory

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

- Peg Neuhauser

Where story gets its power:

**Story does what facts cannot do:**
Most of us have more facts than we can effectively process. When making choices and decisions, most of us don’t need more facts. What we need is help in finding the wisdom to apply those facts. Facts themselves are value neutral. Stories help us make meaning out of the facts that we already have.

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

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

**Stories make information more believable**
Research shows that people find stories more believable then a straightforward presentation of facts.

**Story allows you to speak truth without accusing.**
Consequently, stories allow us to surface and challenge unstated assumptions in the congregation’s culture. They also help us to talk about the gap between espoused and enacted values.

**Storytelling enhances analytical thinking**
Storytelling doesn’t replace analytical thinking. It supplements it by enabling us to imagine a new perspective and is ideally suited to communicating change and stimulating innovation.
The Journey of the Soul is Captured in Story

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

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

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

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

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

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

# Memories Preserved in Story

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

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

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

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

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

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

## What Story is Your Organization Telling?

<table>
<thead>
<tr>
<th>Type of Story</th>
<th>Name of Story</th>
<th>Is it + or -</th>
<th>What values does it teach, or what unstated assumptions does it reveal?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A ‘Hero’ Story</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A ‘Survivor’ Story</td>
<td></td>
<td></td>
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<td>A ‘Kick in the Pants’ Story</td>
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</tr>
<tr>
<td>A ‘Steam Valve’ Story</td>
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</tbody>
</table>
Unbinding the Story

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

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

"Unity is Forged, Not Forced"

-Kouzes and Posner (The Leadership Challenge)
Clarifying Vocation

Much is unsettled in a liminal season. It is important to articulate our core, God-given identity that will provide stability during disturbance. These things we know for sure.

Missional Identity + Core Values + Strategic Priorities

Clarifying your missional identity requires a deep understanding of three intersecting questions, translated into a simple, crystalline concept. Every organization has a missional identity. Effective organizations are intentional about naming their identity and then translating that into a strategy.

Knowing What is Core and What Isn’t

The fundamental distinguishing dynamic of enduring great congregations is that they preserve a cherished core ideology while simultaneously stimulating progress and change in everything that is not part of the core ideology.

Preserve the Core

Stimulate Progress

These congregations distinguish their timeless core values and enduring mission identity (which should remain constant over long periods of time) from their operating practices and business strategies (which should be changing constantly in response to a changing world).

Preserve:
- Core Values
- Core Purposes

Change:
- Operating Culture, Programs & Practices
- Specific goals & strategies

By being clear about what should never change, we are better able to stimulate change and progress in everything else.

Source: Jim Collins, author of « Good to Great »
Clarity about What is Most Important- Now

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

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

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

Examples of Congregational Strategic Priorities:

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

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

Vocation = Missional Identity + Core Values + Strategic Priorities
Engaging Emergence
Emergence: What is it?

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

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

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

Stages of Emergence

1. Something disharmonious occurs, but the organization tries to ignore or deny the disturbance.

2. The disruption becomes bothersome to the point where it can no longer be ignored. We discover how our status quo response leads to conflict or failure.

3. We design or discover new practices to resolve the disruption, considering our most important values. This is innovation.

4. We renew coherence, discovering how to integrate what is novel into what is known.

5. We commit to the adoption of new practices.

What You Can Do to Support Emergence

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

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

3. Innovation
   - Imagine how the recovery of a forgotten practice might lead to something new
   - Bring something from the margin into the mainstream
   - Import a new practice from someplace else
   - Distinguish between repetition and iteration
   - Normalize failure (fail early and learn quickly)
   - Create low risk experiments that allow everyone to learn
What You Can Do to Support Emergence? (cont.)

4. Coherence

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

5. Adoption

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