

Leading a Major Change

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Leadership Resources

October 22, 2013



What is the Episcopal Church Foundation (ECF)?

Overview:

- Independent and lay-led organization
- ECF's mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
- ECF carries out this mission through a wide array of programs including...



Leadership Resources

- ECF Vital Practices (ecfvp.org)
- Vestry Resource Guide
- Fellowship Partners Program
- Educational Events

Financial Resources

- Capital Campaigns
- Planned Giving
- Endowment Management
- Educational Events

For those just joining...

A Few Notes:

- Participants may be muted to cut out background noise and audio interference.
- To start your web cameras, press "Start by Web Cam" button and "Start Sharing".
- If you have questions, please type them into the chat box on the right-hand side of the screen.
- PDF's of the slides and resource list are downloadable.
- This webinar is being recorded and will be made public.



Thanks for coming!



Prayer and introductions

*Lord God, we have no idea where we are going.
We do not see the road ahead of us. Nor do we really know ourselves.
And the fact that we think we are following your will
Does not mean that we are actually doing so.*

*But we believe that the desire to please you
Does in fact please you.*

*And we hope that we will never do anything apart from that desire.
And we know that if we do this,
You will lead us by the right road
Though we may know nothing about it.*

*Therefore we will trust you always
Though we may seem to be lost and in the shadow of death
We will not fear for you are ever with us.*

And you will never leave us to face our struggles alone.

- Prayer of Thomas Merton





Determining area of change & generating urgency



Organizational Level

- Changes related to purpose - mission, vision, identity



Programmatic Level

- Changes related to beginning/ending programs, strengthening program impact



Operational Level

- Changes related to buildings, staffing, volunteer policies, administration

Determining area of change & generating urgency

Rule #1 – Don't underestimate power of inertia

- The absence of a visible crisis
- A rich, successful, and storied past
- Too many visible symbols that all is fine
- A lack of honest feedback around performance of staff, volunteers
- Too many messages from leaders indicating that everything is okay



- From *Leading Change*
by David Kotter

What are sources of inertia in your congregation?



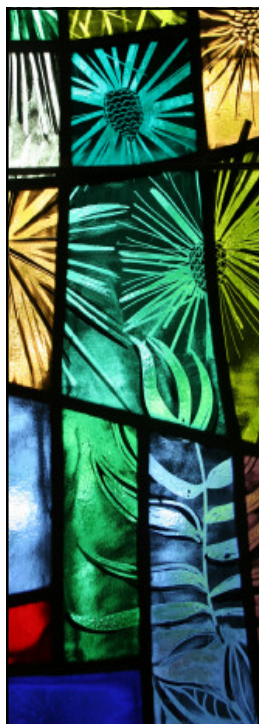
Determining area of change & generating urgency

- Stop saying that everything is okay, become much more honest about problems
- Allow a crisis to loom large (or stop hiding the one already taking place)
- Set high performance standards with leadership teams, staff, volunteers
- Evaluate whether symbols are conveying everything is fine
- Question feasibility of returning to Golden Age
- Bring in an outside consultant to lead frank conversations about systemic problems



- Adapted from *Leading Change*
by David Kotter





Example of broadly defining a need for change and generating urgency

- **Operational:** The congregation needs to make a significant effort over the next few years to grow the annual operating budget.
- **Inertia:** The majority of the congregation's members hasn't experienced the impact of the declining budget. Worship continues every Sunday and by and large they are not the recipients of the mission programs being cut.
- **Building urgency:** The half-time clergy person is considering only presiding at Eucharist every other Sunday. Suddenly, the crisis starts to hit home...



Gathering a team to define the change & frame a vision

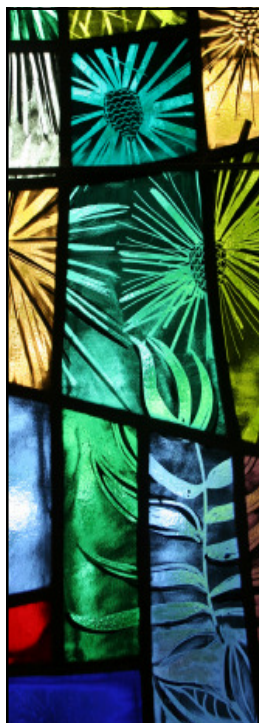
Stakeholder category	Broad effort to grow annual operating budget	Change in location of coffee hour - Part of broader effort to be more hospitable
Those ultimately responsible for decisions	Vestry (including clergy) + stewardship committee	Vestry (including clergy)
Those who implement/prevent implementation	Members of stewardship committee, staff, volunteers	Staff, volunteers
Those who will be directly affected by the outcome	All members of congregation, esp those with significant ability to contribute more	Members of the congregation, newcomers, visitors
Those who have information and expertise	Fundraising experts in the congregation	Leader from another congregation that has worked on hospitality

Gathering a team to define the change & frame a vision

Vision = A hopeful picture of future that describes what things will be like when the change has been accomplished

"Vision plays a key role in producing useful change by helping to **direct, align, and inspire actions** on the part of large numbers of people. Without an appropriate vision, a transformation effort dissolves into a list of confusing, incompatible, and time-consuming projects that go in the wrong direction or nowhere at all."

- Leading Change, John Kotter



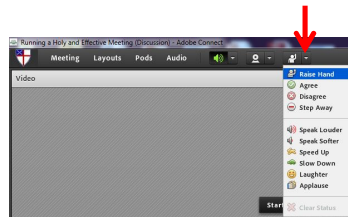
Example of a team framing a vision of change



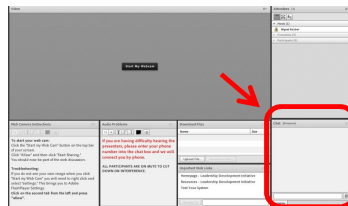
- St. Luke's Episcopal Church in Cleveland, OH



Questions or Comments?



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Or use the chat box in the lower right side of your screen.



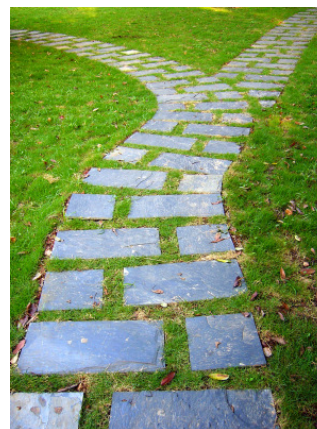
Up Ahead, A Fork in the Road

Where have we been so far:

- Identified a general area that requires major change
- Identifying sources of inertia and building a sense of urgency
- Engaging major stakeholders about the need for change, building a shared sense of where this is all headed
- Articulating a shared vision of what the church/world will look like once the change has been realized

Fork in the road:

- Going from an informal "visioning" group to a formal working group aimed at implementing shared vision

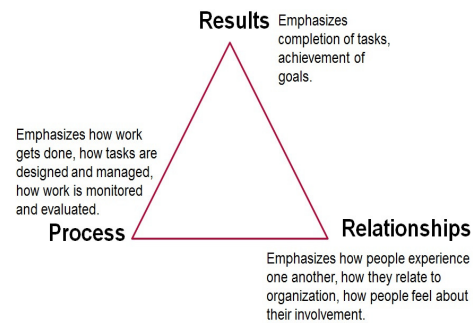


Who will help make this vision a reality?

What is a working group?

In building a working group...

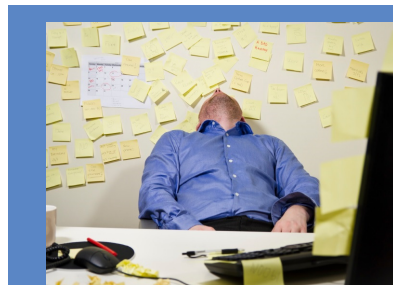
- Know that the shared vision is your best tool for recruiting and focusing team
- Remember your stakeholder categories
- Strive for a balance in results-oriented, process-oriented, relationships-oriented



- From Interaction Associates' Manual on Collaborative Leadership



From “doer” to team leader



Move from:

- An individual actor
- Primary 'doer' of the group
- Focus on operations
- Delegating Tasks



To being:

- Building supporters
- Person who sets the agenda
- Keeps folks on track with the vision
- Delegating responsibility



Building supporters

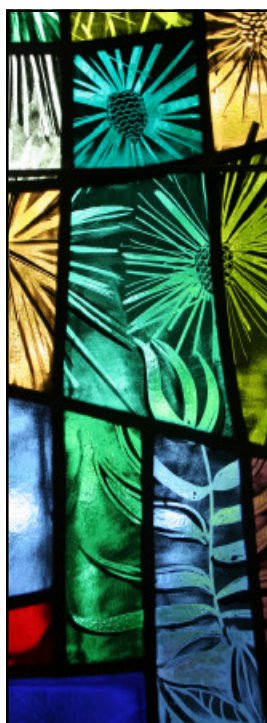
One-on-one conversations:

- It's your responsibility to approach them
- When inviting someone to talk, be clear about the purpose of the conversation
- Listen: about 80% of the time should be the other person talking, 20% would be you talking
- End with a request for a commitment
 - This 'the ask'
 - Needs to be specific and concrete

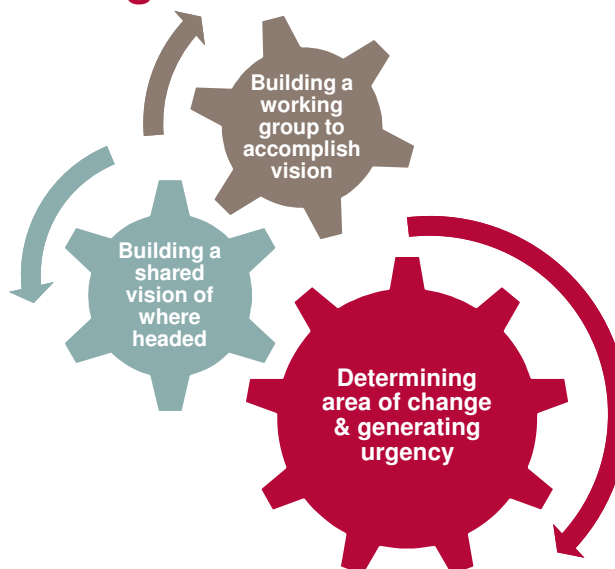
Be sure to follow up with your ask!

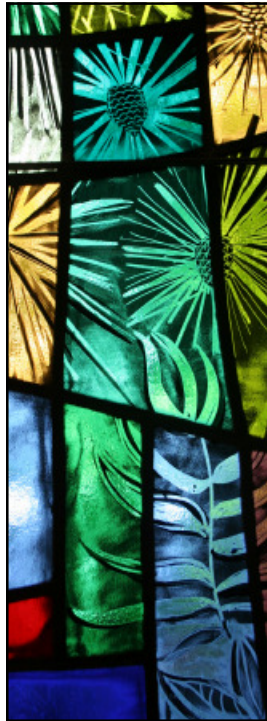


- Who are they? Where are they from?
- What do you care about most?
- Why did you first come to church?
- Is there some aspect of the vision that they are excited about?



Review of Leading a Major Change

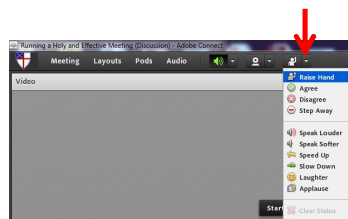




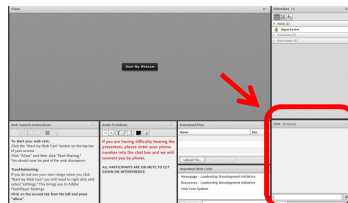
Potential Next Steps:

- **Don't go solo on this.** Bring in the wider community.
- Identify which general area you are primarily concerned about: organizational, programmatic, operational.
- Identify those sources of inertia that have kept this issue from being addressed before.
- Start building urgency around the need for change.
- Make a list of stakeholders and engage each group.
- Listen for elements of a shared vision about what the church/world would look like if this change was accomplished.
- Craft a formal vision of what the church/world would look like once this change has taken place.
- Build a working group whose purpose is to carry out this vision in specific ways.
- Transition from being the primary doer to being a team leader (vision-keeper, network builder, agenda-setter, coach).

Questions or Comments?



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Contact ECF's Leadership Resources Team



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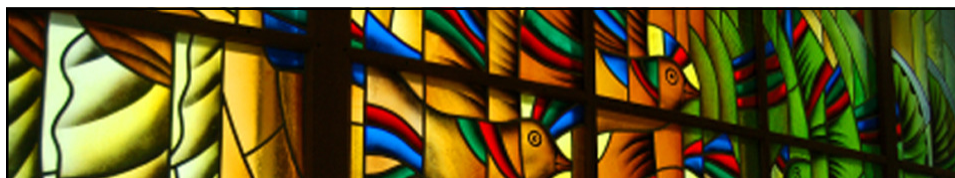
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