INSPIRE LEARNING ABOUT PARISH CONSULTING

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Introduction

INSPIRE used experienced organizational consultants, deployed to work on-site with parish-based pastoral staffs. The consultants assisted pastors and their many different configurations of staff persons in the work of growing collaborative pastoral leadership. In the terminology of the INSPIRE project, pastoral staffs worked to form themselves as “Pastoral Leadership Teams.” The project’s promise to the sponsoring Lilly Endowment, Inc. Sustaining Pastoral Excellence (SPE) program was to build expressions of collaborative pastoral leadership in no less than 36 parishes of the Archdiocese of Chicago.

When the original SPE grant program ended after five years, the project had actually developed iterations of Pastoral Leadership Teams in 46 parishes and among a team of directors from the archdiocesan chancery. The larger number of parishes is due to four clustered inter-parish enrollments, but also subtracts one staff that withdrew from the project. In a four-year Sustaining Grant program the project would re-enroll two pastoral teams in parishes that had merged during their original enrollment. It would also enroll six new parishes and one Episcopal Vicar, his Deans and staff.

Overview

This report draws upon documentation about organizational consultation accrued over nine years of work with pastors, priests, deacons, lay ecclesial ministers, and other laypersons on parish staffs, in Archdiocesan offices, and Episcopal leadership in the Archdiocese of Chicago. I will draw from written reports from some of these persons, from the project’s Parish Consultants, and also interview data. I will offer a project director’s perspective, my own recollections and interpretations of issues and events. Most of the written reports and digitally recorded-and-transcribed interviews are organized in a digital database that INSPIRE stakeholders will work to continue to grow and make available to academic and research specialists after this conference.

The frame for this inquiry about parish consulting holds the following questions and one assertion. What organizational literature informed the consultation INSPIRE developed as “Parish Consultation”? What did INSPIRE learn about organizational consultation with pastors and their staffs? What expressions of collaborative pastoral leadership mark the transition from pastoral staff to Pastoral Leadership Team? How can consultative relationships assist that development? Compared to the consulting praxis in corporate, community, and NGO settings in the United States and Europe, is organizational consulting in Catholic parishes strikingly
different, or at least somehow nuanced? (Yes, I will assert, it is “strikingly nuanced” with respect to content, flow, application. The case will be supported by narrative drawn from INSPIRE data.)

This paper aims at building a public case and groundwork for a new form of consulting to parishes, pastoral teams and leadership persons in parish communities. It also profiles the unique capacities and intelligence one must bring to that kind of consulting. It suggests that forming and growing persons who can provide parishes with mission-oriented consultation should become an institutional priority for church leaders.

Readers will get a brief orientation to the organizational literature that informs this consultation. Then they will tour INSPIRE’s application of the disciplines derived from the team learning concepts so critical in today’s business and non-profit service sectors. They will see how the Church’s long valued organization and application of personal transformational learning creates a fruitful interaction with team learning.

Transformational learning among parish staff persons relies upon reflection and action-oriented conversations about Church and parish mission. Over years-long commitments to such personal and shared learning, INSPIRE’s gifted pastoral leadership teams generated particular disciplines for collaborative pastoral leadership. Readers will find those disciplines in the paper’s text and addenda. Finally, they will witness the project’s identification of best consulting practices that can grow both pastoral teams and the parish communities they serve.

I propose that, while at least three iterations of parish-focused consultation are already resident in Catholic institutional settings, a form of organizational consulting widely used in modern corporate and non-profit settings—one that develops relational and mission-focused collaborative praxis among key leaders as stakeholders and stewards—is at best rare, but needs to become a priority service to United States parishes. I will conclude with a reflection on how this emerging agenda for parish consultation could be nurtured and sustained by academic and church leaders.

**The INSPIRE Promise**

To honor its commitment to the Lilly Endowment, Inc. Sustaining Pastoral Excellence program, Loyola University Chicago and the Archdiocese of Chicago formed a “Partnership Initiative” that would bring organizational development expertise and collaborative pastoral leadership to parish staffs in the Church of Chicago. Before they approved the project, Endowment leaders asked the partnership to reconfigure implementation strategy away from reliance on academic programming and training efforts. Project leaders proposed a delivery system employing on-site services of a consultant to work with pastor and staff. The project would also bring the pastoral teams together and encourage networking among them.

“INSPIRE serves as a resource connecting pastoral leaders who currently pastor

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1 The revised strategic agenda also suggested that Pastoral Leadership Teams would mentor and form other teams, presumably those from other, neighboring parishes. Because of the nature of pastoral ministry commitments and the number one finding about pastoral staff persons in Chicago [that they are deeply task-oriented and settled in to work in the parish that is always pressing] the director and Lead Team abandoned this scenario by midway through the second year.
with distinction, with those who can be mentored and coached to one day display excellence of their own. INSPIRE offers programming leading to a transformation, over time, in the culture of the archdiocese, so that excellence is cultivated and nurtured in all of the archdiocese’s pastoral leaders.”  —Michael Garanzini, SJ. Letter of introduction to the Lilly Endowment “Sustaining Pastoral Excellence” program director, September 2003

“INSPIRE will unite the resources of a university-based Catholic school of ministry (Institute of Pastoral Studies—Loyola University Chicago) and one of the nation’s largest concentration of Roman Catholics (Archdiocese of Chicago).”

“…INSPIRE aims to strengthen the essential unity of ministries in the Archdiocese, to promote a shared ecclesial vision, and to foster a team-based sense of responsibility for pastoral excellence among Pastoral Leadership Teams of the Catholic Church in Chicago.”  — Proposal to Sustaining Pastoral Excellence (SPE) program of the Lilly Endowment, Inc., 2003.

**OD meets Church and Parish**

INSPIRE’s leadership determined to bring the praxes of organizational development (OD), leadership development, and organizational psychology to the Catholic parish setting. They drew from a base of literature in these fields with the intention to adapt corporate practices to serve Church mission and complement the Chicago Catholic ecclesial culture. The three disciplines are relative newcomers to the enterprises of corporate and community organizations, if only because the concept of “organization” is itself a largely mid-20th century accommodation. Organizational authority Peter Drucker found seeds of “the organization” in the early Industrial Age but asserted that ideas of organizing, managing, and leading “organizations” began gaining traction only by post-WWII and the early Information Age through the late 20th century (Drucker, 2004). He describes the movement from “command and control” models of “scientific management” to forms of management and articulations of leadership that invite the practical “knowledges” and the wisdom of “workers” into the directional processes that shape and advance the ordering of structures, production of goods and services, and even declarations of corporate mission.

INSPIRE’s Lead Team, a group of five persons from Church and University, challenged themselves to respect the differences between corporate or community organizations and the particular organization that we identify as the Catholic parish. Parishes do not exist to produce a product, to provide a particular social service—they are faith communities formed to express Eucharistic thanksgiving and praise, to ground people’s lives in faithful living, and to further the mission of Christ to all the world. They certainly perform work, starting with the work of sacraments and sacramentality, and they render service in many forms in their communities and beyond. In the course of expressing their institutional commission from their local Church, they give witness and amplify a message to secular society that often runs counter to purely profit-centered or humanist or capitalist or socialist agenda. That is, they express ecclesial and communal mission in service of the Gospel, one that makes essential an ongoing narrative of personal and corporate encounters with divinity and saving grace.

INSPIRE longed for and attempted to move toward a comprehensive “ecclesiology of the local parish community,” and these remarks are intended only to hint at the broadest contours of that
challenge. Other papers and conversations at this conference discuss such matters in more specific detail. I wish only to describe the context of our caution against wholesale adoption of assumptions and practices from corporate culture. Parish ministers adroitly practice the hermeneutic of suspicion. They rightly bristle at interventions with “business” or corporate and organizational agenda that discount or appear to patronize their faith-oriented, pastoral, and prophetic agenda.

The consultative work we did in INSPIRE, however, rose out of that corporate world and its professions, sciences, and social studies. Selectively and briefly, I want to identify the insights and practices we engaged, and some of the theorists and writers from that North American/European corporate milieu—most of them at one time or another consultants themselves. This, however, I present as more than acknowledgment. I propose that Catholic church leaders and especially pastoral educators attend to this body of work, so that some of its principles and practices move from novelty to routine in pastoral praxis.²

I first want to recognize someone serving only a block away from us, without whom INSPIRE would certainly never have happened as it did in execution or achievement. Dr. Homer Johnson founded and led the Loyola University Chicago Center for Organizational Studies at the Institute for Workplace Studies. The Center educated and trained several INSPIRE parish consultants. Dr Johnson’s book, Basic Principles of Effective Consulting co-authored with Loyola’s Dr. Linda K. Stroh, is a mainstay for consultation practitioners. Recently Dr. Johnson co-authored another text that will serve the field for a long time, Critical Issues in Organization Development: Case Studies for Analysis and Discussion.

We chose consultants with career histories that included church and parish-based ministries, but who were also credentialed and proficient in the organizational disciplines. Six of our first seven consultants just happened to get their organizational or pastoral training at Loyola, one at the Institute of Pastoral Studies, and five at Dr. Johnson’s program. There they learned and practiced the disciplines of many of the following authors, and launched themselves on lifelong learning paths to meet up with some of the other writers and published consultants named below.

Johnson and Stroh (2005)³ assert a twofold division to the population of organizational consultants. Some are “experts” bringing a specific knowledge or skill to an organization. Others are “facilitators” whose services apply awareness of relational and communicative dynamics to decision making, learning, planning and problem-solving performances. Most, the authors acknowledge, tend to bring both kinds of services—expertise and facilitation—to a consultative intervention. This would hold true for INSPIRE’s parish consultants, but their profiles, instincts, and intentions would skew toward facilitative agenda.

² I am indebted to Dr. Barbara Fleischer for conversations about theologian David Tracy’s appeal to “mutually critical correlation” and for stirring my interest in practical theology as an INSPIRE resource. The latter will be more evident in other papers prepared for this INSPIRE Milestone Conference.

³ In the following overview of organizational literature, I supply dating of the earliest text, pertinent to the subject specified, in an author’s bibliography. All these authors developed and refined their thought in later titles. Many are still active in writing and publishing. At the conclusion of this paper I offer a selective bibliography, mostly texts that are more readily accessible in book or e-book form.
The context of parish consultation is systems orientation. Awareness of process and interactions of actors and among different systems were raised by multi-disciplinary array of observers from scientific communities: science biographer James Gleick on chaos (1987), biologist Ludwig von Bertalanffy (1968) on systems theory, and physicist/science historian Thomas Kuhn on the social dynamics of introducing new scientific paradigms (1968) are examples of philosopher writers with scant or no intention to inform the management and leadership of organizations.

But organizational writers like converted bio-chemist Margaret Wheatley (1996), similarly converted aero-space engineer Peter Senge (1990), and well before them management pioneer Peter Drucker read from the scientific literature and applied new insights to organized human enterprise. Drucker left Nazi Germany for London and then the United States. His published writings spanned from 1939 to 2008, three years after his death. He wrote keen observations of how businesses, corporations and industries form, reform, deteriorate and innovate.

All six writers admonish readers to step back and make the effort to understand a wider view, the relationships and balances within their own institutional systems and with other systems in their environment. All prescribe paying attention to relationships. Drucker, Senge, and Wheatley propose that taking extra time and making the effort to grow shared vision is, in the age of information and learning organizations, the pathway to achieving objectives and animating mission.


Still other writers would apply systems concepts to institutional leadership, managerial supervision, and planning. Tom Peters (1982) authored a series books advocating organizations that could respond to “whitewater” change by deconstructing command and control rubrics and enlisting workers as partners in the pursuit of excellence. Colleagues Chris Argyris and Donald Schön (1978) mapped the rhythms of organizational communication and learning, and established team learning protocols to grow adaptive communities and achieve actionable knowledge. Henry Mintzberg (1973) expanded similar insights into the designing, structuring, and directing of organizations and leveraging their power dynamics, convincingly proposing that planning by a few designated managers or specialists is neither strategic nor effective (1979).

Others taking the wider view explored the impact of culture in organizations. Terry Deal and Allan Kennedy (1982) raised awareness of the invisible, potent and potentially insidious or liberating presence of culture in organizations. Edgar Schein (1992) plumbed the depths of organizational culture to reveal its hidden, delimiting, and change-resistant dynamics. Charles Handy (1989) would declare that change is no longer what it used to be—that is, chronological
and rational or disruptive and catastrophic—that status quo is no longer the way forward, and that change-resistant cultures breed feeble non-adaptive organizations.

Another take on culture in organizational life would come from practitioners of a new style of leadership, one that gathers, consults, invites, enlists, and grows teams, often multi-disciplinary and drawn from all sectors and levels of an organization. Joseph Rost (1991) assaulted the “great man” theory of leadership and the use of coercion to lead and manage. Max DePree (1989) founded and grew a “Fortune 100” international corporation and wrote about making interdisciplinary teams routine. Sharon Daloz Parks (2005) suggested that particular disciplines of leadership could be taught, and that leadership itself could be contagious in organizations where leaders inspire people to lead.

Gender’s influence on leadership styles, and the feminine influence on corporate culture became a critically important contribution. Frances Hesselbein (2002) drew upon her experience as CEO of the Girl Scouts of the USA and as the first Executive Director of the Drucker Foundation to describe inclusive and multi-disciplined leaders and organizational designs. Sally Helgesen (1995) described Hesselbein’s unique structuring of the Girl Scouts at the vice presidential executive level, and identified new patterns of executive organizational structuring that leverage “webs of inclusion.”

At the Project INSPIRE 2004 start-up, new writing about ethnic and multi-ethnic cultures in organizations and communities had yet to inform the project’s work, but arose during the project’s later years. Juana Bordas’ Salsa, Soul, and Leadership (2011) on leadership in Latino/a, African-American, and Native American cultures brought an unprecedented representation of pastoral ministers from Chicago’s multi-ethnic parishes to INSPIRE’s 2011 leadership programming.

**Tools and Learning Practices**

INSPIRE programming would leverage this broad scope of organizational thinking by enlisting learning and assessment tools that arose out of it. Some resources were carried to pastoral teams by consultants versed or actually certified in the application of particular tools out of the new field of organizational psychology or the expanding fields of organizational management and leadership. During WWII, the daughter-mother team of Isabel Briggs Myers and Catherine Cook Briggs initiated the development of the Myers-Briggs Type Indicator (1956) based on the psychological personality traits identified by Swiss psychologist Carl Jung. Our consultants encountered many parish staffs that had some members already cognizant of their Myers-Briggs profiles, and MBTI profiling became an early reference for teams addressing communication patterns. Similar patterns of implementation appeared with the use of other personality or communication profiles, such as DISC (Dominance, Inducement, Submission, Compliance) based on the work of Marston (1928).

Several other writers became direct contributors to consulting and team learning activities in the project. Stephen Covey’s books on the Seven Habits of Highly Effective People (1989), the “Eighth Habit” (cultivating voice), time management, and principle-centered leadership became consultant-staff conversation items and team reading staples for some pastoral teams. Scenario planning at rectory tables, in parish halls, and at INSPIRE convocations drew from the insights

Finally, the work of Peter Block (1991 ff.) informed design and approach to facilitative consulting conceived by the project’s director and Lead Team. Block’s description of the consulting stages from intake to implementation, engagement, and termination gave us the framework with which we would introduce the project, build contracts and learning plans, and grow continuing relationships with INSPIRE’s first 36 pastoral leadership teams. Updates to his seminal work, Flawless Consulting, continued to inform our later work. His reflection on asset based consulting and community development in Community, the Structure of Belonging (2008) opened new horizons for our reflections on parish communities during the Sustaining Grant years after 2009.

**Applying OD to Church**

Informed by this pantheon of writers, how did we apply forms of traditional corporate consultation to church settings? Before answering, I must first acknowledge that we Catholics were not and are not in any kind of vanguard. Founded in the mid-1970’s, the Alban Institute became an early provider of outside consultation services to Protestant congregations in the United States.

Neither is INSPIRE truly groundbreaking as a Catholic adaptation. Two early proponents of collaboration in Catholic ministry settings, Brother Loughlan Soffield and Sr. Carol Juliano outlined the contours of collaborative ministry in Collaborative Ministry: Skills and Guidelines (1977). At least two estimable Jesuit priests pioneered consultation in church and parish settings. In Cincinnati, Fr. George Wilson, SJ, began his leadership at Management Design Institute in 1972, and developed services fostering “organizational health” in corporate, community, and church settings to provide “people engaged in a group enterprise with process help by which they can achieve a clearer sense of mission and the ways to achieve it.” Earlier this year, Fr. Tom Sweetser, SJ, celebrated the 40th anniversary of the Parish Evaluation Project (PEP), a nationally and internationally recognized pastoral consultation service that provides in-depth, on-site consultation to pastors, staffs, and parish leaders.3


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4 See the MDI website: [www.managementdesign.homestead.com](http://www.managementdesign.homestead.com)
5 At the heart of “PEP” consultation is the Parish Assessment and Renewal process, an “information gathering and futures planning” resource. Fr. Sweetser has authored or co-authored several well known books, including Keeping the Covenant (2007) and The Parish as Covenant (2001). PEP website: [www.pepparish.org](http://www.pepparish.org) For nine years it has been my privilege to learn from Fr. Sweetser while serving on the PEP Board.

These early Catholic adopters faced ministerial reticence or resistance as did INSPIRE leaders. On face, INSPIRE looks like a corporate-world import. Parish consultants aim to do the very same things as corporate consultants: help their clients step back and see, inform them, build space for reflection and consideration, engage honest, trusting conversations that lead to commitments and action. And, on face, their clients—Catholic pastors and staffs of ordained and laypersons—are temperamentally no different than CEO’s and executive teams. They too function together as human systems. Everyone would rather just get on with the work, solve the problem, address the challenge, but while expending the minimal amount of energy in order to come just-together-enough to cut through what needs cutting through, be it communication difficulties, external threats, conflicting priorities.

However, even before “Project INSPIRE” launched, its designers and those with whom they consulted expressed leeriness about bringing practices from the “business world” into church settings. People in ministry see themselves and their religious mission as different. A minor incident at the project’s second convocation of enrolled parish staffs illustrates the tension. After some consideration, INSPIRE leaders had settled on a designation for the role of the professional person who would meet with pastors and staffs and guide them in forming personal and team learning plans. The lead team rejected titles like *coach*, *advisor*, and *mentor*, settling on *parish consultant*. When consultants were introduced at the gathering, one pastor objected to the title: it sounded too much like business. Somehow, the project’s organizational development consulting paradigm had to undergo its own RCIA.  

Experiences of reticence from the client community affirmed our own hesitation to adopt “OD” practices wholesale. As the new Director of the project, I joined the project leadership in taking a cautious approach, but I could only express it as an intuitive sensibility. Review of our practices in the first two years shows us mostly doing what had been done by others with similar challenges for several decades: we added prayer. Into significant events like enrollments, decision-making moments, conversations about difficult topics we added rituals and reflection based on scripture. I can no longer tell from reading about these strategic divergences whether or when, in execution, they were *pro forma* or consequential difference-makers in changing the consultative and collaborative environment.

I do, however, have little doubt that when consultants and pastoral teams were sincere and transparent in taking the time to abide in prayer, there was already the beginning of a climate, an openness or readiness to build uncommon common ground. Facilitative consultants initially work to create reflective, conversational climates. Up front, some facilitators are reluctant to advertise the whole truth about one of their intentions: they aim to get their clients to slow down their thinking, rather than to increase speed and efficiency. They strive to produce safe, comfortable silences. The insertion of prayer and ritual into facilitation was therefore a natural for the client population, but by itself it risked becoming a somewhat artificial, add-on device.  

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6 *Rite of Christian Initiation of Adults*, the formational pathway by which adults experience conversion and are sacramentally received into the Church.
INSPIRE Team Learning Agenda

Two persons from Loyola’s Institute of Pastoral Studies (IPS) and two directors of the Archdiocesan continuing formation ministries composed INSPIRE’s original Lead Team. Seven months before initiation of the project and hiring a director they crafted, I believe, a brilliant response to bridge the gap between corporate-world and ecclesial-world. They built a simple but sophisticated personal learning and team-learning schema.

The designers declared a project agenda of growing “Pastoral Leadership Teams” possessing “a sustained, mindful peculiar integration of knowledge, spirituality, skill and experience.” These objectives formed “the curricular matrix of INSPIRE.” The project would support the aim of the Lilly Endowment’s Sustaining Pastoral Excellence (SPE) grant program, the development of “pastoral imagination.” The term appeared as a guiding theme in SPE literature, conceived by Dr. Craig Dykstra as “a peculiar intelligence that involves… capacities of mind, spirit and action that are specific to pastoral ministry itself.” By the end of the project’s first year, the INSPIRE team had developed and refined the concept:

Recognizing and sustaining pastoral excellence became a matter of creating ways to promote Pastoral Imagination. Pastoral Imagination is identified as “a peculiar intelligence born of a unique integration of knowledge, skill, experience, and spirituality both in individuals and in Pastoral Leadership Teams.”

Personal learning would complement team learning, and both were supported by grant funding. Learning plans would aim to cultivate persons and teams of pastoral imagination by weaving into the plans four “broad, inter-related areas essential to Pastoral Leadership Teams:

A) human/personal formation
B) spiritual life and formation
C) intellectual/theological rootedness
D) skills for ministry."

Each of these four learning areas would be addressed as both personal and team activities. The learning schema evinced—if not only its own pastoral imagination—pastoral wisdom, and it drew from an excellent source. It applied INSPIRE’s twofold adaptation (personal and team

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7 Dr. Mary Elsbernd from Loyola IPS and Sr. Judy Valliamont, SSsP from the archdiocesan Office of Continuing Ministerial Formation and colleagues Dr. Peter Gilmour (IPS) and Dr. Joseph Bator (OCM). Their determination to expand INSPIRE’s focus from pastors alone to pastoral teams is described on p. 13 ff.
8 Proposal to the Lilly Endowment, Inc., Sustaining Pastoral Excellence program, September 15, 2003, p. 12. The proposal was supported by an early 2002 survey of Loyola IPS alumnae, mostly non-ordained lay women and men, by data from the national Center for Applied Research in the Apostolate (CARA), and by a 2001 archdiocesan Office for Formation in Ministry consultation with Episcopal Vicars and agency directors, and by a 2003 survey of active Pastoral Associates in parishes.
9 Spring, 2001 Newsletter of the Lilly Endowment, Inc. Dr. Dykstra’s appeal to pastoral imagination took seriously the multiple intelligences proposed by Howard Gardner. Successful applications (66 of well over 400 submitted to SPE) would support the Endowment’s challenge to identify and support ministers whose already successful service demonstrated personal capacity for pastoral imagination and excellence.
10 INSPIRE 2004 Annual Report, pp. 13-14
11 Proposal, pp.4-8.
learning) of Pope John Paul II’s formational agenda in the apostolic exhortation, *Pastores Dabo Vobis.*

The designers understood the kinds of personal and collective challenges to which the project would call lay and ordained ministers. Collaborative pastoral leadership aims to make persons, families, and communities whole. Pastoral persons must understand themselves and each other as grounded persons of emotional and spiritual depth. As teams they must become adept at much more than communication. To co-labor, to work together, they must share inquiry, conversation, truth-exploration, and dialogue. They must acquire the technical skills of shared strategic, mission-focused planning. At times they must become appreciative custodians of their own limitations and failures. The particular genius of the INSPIRE learning agenda, I propose, is that it makes explicit each of the first two learning areas: personal and team integration; personal and shared spirituality.

So for me, what I felt I really could use, going into priesthood and what not, is a retreat experience. So I did that. …There’s a famous phrase that you can’t give what you don’t have. As ministers, as pastoral people, our lives are about giving. But if we don’t have a tank, it’s going to be hard to do it.

*Interview, newly ordained associate pastor, suburban parish*

I have used some of the personal funds to work with a personal trainer to learn more about flexibility and strengthening. For me the experience to date has been one of coming to know more about the mind/body connection. Just setting the time aside each week for these past six weeks has become important. It is a real respite in a busy schedule.

*Interview, senior pastor, city parish*

When first asked to be part of the pastoral team, I wasn’t quite sure that as the facilities manager I should be. But after our first overnight I had really started to understand that what I do is actually a ministry. …The whole experience has helped bring me closer to not just the staff but also with the parishioners.

*Interview, facilities manager, suburban parish*

The first area suggests consideration of personal wholeness work. When it focused team engagements, it addressed team capacities to give and take, speak and listen, to appreciate gifts, languages, perceptions, and contributions that are not one’s own. As personal integration it includes matters of personal health and physical stamina in addition to psychological wellness. It includes the permission, rather the necessity, to explore one’s own creative and intellectual passions that round out one’s personhood. Human formation as a team means cultivation of healthy relationships and a respect for the talents, limits, and intentions that each member brings to shared mission. Members of such teams undergo tempering and experience personal growth. They take that maturity into the team setting.

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13 The INSPIRE continuing formation agenda echoes the Holy Father’s concerns for future priests’ balance, relational
…it was something that really struck me… we realized we were truly a team.
…Fr. Rich came with his ideas and we got down to what goals we really wanted.
…and in our conversation of a couple of those things, he found and we found we were going in a different direction, and he literally took his paper and turned it over and started over. …and that was a really big moment for us.

Interview, school principal, suburban parish

As INSPIRE consultants and teams engaged the spiritual learning activities, we began to understand the unique advantage that pastoral teams have over their corporate and community peers. The identification of spirituality as a critical learning area offers a pastor and staff an asset for both personal and collaborative grounding that could be hard won in secular settings. Catholic pastoral teams gather persons who draw inspiration from liturgical worship and a common text, a shared faith tradition and narrative that affirms their unusual life dedications. They can draw from a common scriptural well. They can process matters of the heart and faith encounters that brought them to parish work. Each can readily name the why of personal mission, and so build the collective appreciation of what and how of the work they share.

…we spend a good deal of time in prayer at our meetings, We begin with the upcoming readings or the gospel to engage in conversation. They’re meaningful and they are prayerful conversations.

Continuation of interview with school principal, suburban parish

Ironically, spiritual depth is what parishioners assume their pastoral people naturally have, and actually most do demonstrate exceptional spirituality. Their spiritual lives, however, tend to erode in the daily grind of church work. Many spend days bereft of serene moments, filled to the brim with tasks, deadlines, and interruptions. Their roles and workdays breed experiences of isolation. Chicago clergy, we discovered, could usually point to important resources to help them nurture spirituality: peer groups, annual retreats, routine practices like the breviary and liturgical calendar. We noticed, however, that lay ministers named less of these kinds of supports, and more of the stresses between ministry in the parish and ministry to their own families. For them most days ended with feelings of being spiritually tapped out. We found that lay ministers would be most likely to select the learning area of spiritual formation as their first area of desired growth. Staff retreat days also emerged as popular early team learning activities.

capacity, and affective maturity in PDV:
Future priests should therefore cultivate a series of human qualities, not only out of proper and due growth and realization of self, but also with a view to the ministry. These qualities are needed for them to be balanced people, strong and free, capable of bearing the weight of pastoral responsibilities.

Of special importance is the capacity to relate to others. This is truly fundamental for a person who is called to be responsible for a community and to be a “man of communion.” This demands that the priest not be arrogant, or quarrelsome, but affable, hospitable, sincere in his words and heart, prudent and discreet, generous and ready to serve, capable of opening himself to clear and brotherly relationships and of encouraging the same in others… In this context affective maturity, which is the result of an education in true and responsible love, is a significant and decisive factor in the formation of candidates for the priesthood. PDV, excerpted, §43.

By the time we began to enroll the second cohort of six pastoral staffs, some INSPIRE parish consultants noted a significant difference between consultation in corporate settings and parish settings. In the former, developing a sense of spirit usually came, if at all, after “more urgent” matters of strategy and execution were addressed. In parish settings, spirituality is the gateway.  

The third learning area, identified by the designers as “theological/intellectual rootedness” went through several titling iterations, as consultants attempted to describe and attract learning commitments. For some persons, the original term appeared off-putting and academic. Some others did, however, catch the sense of the terms and sought enrollment in formal studies at Loyola University Chicago Institute of Pastoral Studies (IPS) or Chicago’s Catholic Theological Union (CTU). Still others sought to build their understanding of Catholic teaching and tradition. For personal learning some would identify programs offered by the archdiocesan catechetical and school offices. By the end of the project’s second year, the study area was simply referenced as “Tradition” or “Immersion in Catholic Tradition.”

By end of the project’s third year, a reflection I wrote for the National Association for Lay Ministry (NALM) profiled the span of “theological/intellectual rootedness” activities:

**Tradition** Personal immersion into the Church’s rich theological, liturgical, doctrinal, and moral teaching is concomitant with one’s dedication to pastoral service. Personal learning activities chosen by INSPIRE participants range from conferences and study days to enrollment in continuing education and degree programs. Teams read and share perceptions of books with theological or pastoral titles. Some engage seminary or university professors to conduct one-day programs designed for on-site delivery. Despite wide differences in most teams’ levels of formal education, when teams learn to share theological reflection, there are remarkable outcomes. One team still follows a three-year-old commitment to engage common learning that connects Eucharist with Catholic Social Teaching. The encounter continues to critique and reshape both the parish mission and personal commitments to that mission.

The fourth learning area, Skills for Ministry, seemed clear and wide open enough that consultants believed they had little to do but ask the question, “So, what are the skills you want to grow to enhance your ministry?” Many of the responses were unsurprising: the DRE who felt the need to build personal capacity in adult education; the pastoral associate who wanted to learn conversational Spanish; the pastoral team that wanted to build a parishioner leadership development process. This is the area that brought us some wonderful anecdotes. One pastor confided behind a closed door that he wanted personal training “off hours” that would help him learn how to work the computer at his desk. A year later he shared an annual report with staff and parishioners featuring his first computer-generated slideshow presentation.

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15 In parish staff settings with perceptible significant tensions or relational obstacles, however, consultants saw less attraction to *team* spiritual formation agenda. Instead, people expressed the need to learn how to “communicate better” or sought to pursue only personal learning activities including spiritual formation.

Implementation of this “technical learning” area, however, revealed two important dynamics about pastoral development in Catholic parishes. There were more people than the one pastor checking to see if the door was closed. Several lay ministers expressed concern about their certification requirements, coursework or training they needed to document. They needed to certify knowledge acquisition or performance competencies for their particular ministry. This sort of learning had been anticipated and thus supported by the INSPIRE guidelines for personal learning. It only stood out in relief when we observed another kind of learning objective sought by other participants.

INSPIRE’s learning program was deliberately open-ended, rather than restricted to learning objectives aimed at developing required competencies for any particular ministry. Since our consultants were helping people establish learning programs that could enhance personal integration, they asked questions that probed personal desires, passionate pursuits. One of the earliest enrolled associate pastors, whom many considered one of the best homilists in the archdiocese, listened to his consultant, then chose to pursue advanced work in homiletics.

Over the project’s nine years, we watched people take delight in enrolling themselves in some ministerial pursuit that was either beyond the minimum certification standard or significantly outside of their ministry assignment. Three pastors expressed desire to return to doctoral dissertations left long behind when they responded to pastoral service calls. School principals returned to programs that strengthened their leadership or administrative skills or built stronger theological capacities. Reflection on this phenomenon prompted consultant awareness that institutional cultures can promote entry-level standards that unintentionally may also be ceilings.

More importantly these experiences set us up to understand and cultivate a form of consultation that seeks purposes other than addressing deficiencies or responding to problems and crises. Such forms of remediative consultation are in no way unnecessary, and competency based forms of development assure communities of a certain quality and benchmarked standards for ministry. Nevertheless, pastors and staff persons thanked us for asking questions and affirming ministerial possibilities they had seldom or never been asked to consider. We further appreciated the Lilly Endowment’s designation of a program that quite explicitly called over sixty projects nationally to aim for “pastoral excellence.” The experience would prepare us in later years to pay attention to asset-based organizational development like that taught in IPS’s Social Justice Master of Arts program and associated programs out of Chicago’s Seminary Consortium for Urban Pastoral Education (SCUPE), and Northwestern University’s Community Development Program at the Institute for Policy Research.

**Consultation for Pastoral Teams**

To arrive at an alternative form of parish consulting, to assist envisioning it together, it is helpful to consider how consultation already occurs in parishes throughout the Church in the United States. Three approaches to church consulting are fairly easy to discern. They bring particular forms of expertise and facilitation to pastoral leaders, church ministers, and parish lay leaders.

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The consultation is usually provided through institutions like diocesan agencies, ministerial organizations, conferences, for-profit consulting firms, non-profit service organizations, or universities. Many are project focused, providing outside experts and resources: setting up and executing a fund drive; planning a construction project; fixing the roof that starts leaking every ten years; responding to or forestalling a crisis or a threat (witness the widespread development of procedures and protocols for building security and unthinkable emergencies that, only a few years ago, we never thought about). Another form of consultation, the kind few ever want for themselves, addresses remediation or responses to dysfunction: how to face up to the overwhelming debt and upside down budget; dealing with a new litany of personnel issues; responding to issues of discord and conflict; reigning in a runaway budget.

Finally, the most common consultation to parishes is relatively recent in our history and, as dioceses cut back on services, currently coming into increasingly in short supply. Consultants may come from diocesan agencies, or from local or national ministerial associations. They work to address and support particular ministerial, managerial, or organizational functions. Common forms include consultation for Catholic school and parish religious education programs, for parish councils and commissions, human resources, social justice ministries, lay ecclesial and diaconal ministries, and so on. Consultation for particular ministries may address a wide range of particular missions and dedications, for instance, ministry to migrants, community organizing, RCIA, justice and non-violence efforts, or liturgical renewal. Some consultation may promote certification pathways including training or formation that precedes or renews local Church authorization and other forms of validation for particular ministries.

I propose an arguable arrangement of these forms of consulting in today’s local Churches and their parishes:

- consulting for planning;
- consulting for remediation;
- consulting for ministries and management.

Parish leaders might request any one of the three, though the second is often mandated, and each could originate from a diocesan commission or implementation of policy. They all attend to the same distinctive focus: performance. Each follows evaluative measures that apply to doing things in a certain way, to assuring competencies for particular functions and ministries, to achievement of programs, routines and efficiencies, meeting standards and policies, or to completion of projects.

Two distinct but complementary pastoral formation agenda converged to “inspire” the consulting that emerged in our project. The Lilly Endowment Sustaining Pastoral Excellence (SPE) program called attention away from problem-focused or corrective processes, and thus also away from simple formational agenda addressing a particular ministerial performance and function. The challenge to those in application for an SPE grant: propose ways to support those who are succeeding as pastors. The Endowment leadership boldly proclaimed the E-word, Excellence as the focus of a national project. Assessing data from recent Endowment sponsored studies, the Lilly Endowment leadership seemed keenly aware of one big looming constant in parish and congregational ministry. Inevitably, pastoral work gets lonely, isolating, de-energizing even for
those who show traits of pastoral excellence. What if, the Endowment implied, we were to front-load resources that at least mitigate the stressors that cause burn-out, that at best strengthen and grow persons so they exude pastoral excellence? It is no surprise that a large majority of successful proposals to SPE promised to establish and cultivate pastoral peer groups or build networks among pastoral persons. And no surprise that most peer-gathering projects succeeded.

Two leaders in Chicago expanded the SPE agenda. Dr. Mary Elsbernd, OFM, and Sr. Judith Vallimont, SSPS, called to the Endowment’s attention the pastoral excellence of lay people serving in pastoral assignments in the Chicago Catholic Church. While an important document from the United States Conference of Catholic Bishops, Co-Workers in the Vineyard of the Lord: A Resource for Guiding the Development of Lay Ecclesial Ministry, was in embryonic form—finally published in late 2005—Dr. Elsbernd and Sr. Judith, along with Dr. Joseph Bator and Dr. Peter Gilmour co-wrote a proposal to identify “excellent” pastoral staffs in the Archdiocese and build their capacities for collaboration in excellent pastoral leadership. The Chicago proposal team promised to develop Pastoral Leadership Teams on-site and to supplement with occasional large group gatherings.

It is easy to miss the proposal’s nuance. It expressed a university/archdiocese institutional partnership formed to do something more than assert the posture of lay people in Catholic pastoral ministry. The INSPIRE project would call attention to the important contribution of ordained and lay persons who “co-work” as co-laborers in parish communities. That is, the principal focus would not be on distinct performances of pastoral ministers, but on their capacity to perform excellent pastoral leadership collaboratively. INSPIRE, we would often advise pastors and staffs, is first about forming collaborative relationships in ministry. Pastoral team members could pursue certain performance competencies, but we would work to position those skills to enhance the integrity and collaborative capacity of the pastoral team.

Then, how would we evaluate, how would we offer to stakeholders what the SPE program called “signs of success” in the pursuit of collaborative pastoral leadership? We would have to allow our early enrolling teams to show us what collaboration looks like in pastoral praxis.

We followed our first twelve pastoral teams as they positioned themselves for, attempted, backed away from, or grew collaborative behaviors among themselves. What does it look like when parish teams demonstrate collaborative pastoral leadership? Our first efforts at getting feedback from the teams themselves were hampered by the bulky reporting and accountability instruments we gave them. Eventually we got wise, however, and went digital. At first we recorded and transcribed interviews with pastors and team members. We later enhanced the INSPIRE website with a simple reporting tool that asked our parish team members to give us “three sentence” reports. As hoped, many reports lengthened into paragraphs, some with rich detail. Finally, we employed N-Vivo, a narrative reporting and data organizing software that gave us increased storage, retrieval and assessment facility.18

Early on, therefore, the best feedback about collaborative behavior came through consultant observations and the conversations they generated. An early supposition about the INSPIRE

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18 The software grows a researcher’s capacity to build comparative narrative data. A sample information-node search is included as an addendum.
consultation effort projected limited consultant engagements. Pastors and staffs, we assumed, would work with a consultant until learning and reporting plans were complete; then the consultant might refer the clients to appropriate providers for personal and team learning activities. We did not anticipate a critically important human dynamic: the accelerated trust building that goes on when clients see the consultant as a “safe outsider” who will not be reporting to official superiors in the local administrative hierarchy. Most teams bonded with their original consultant, and others tended to change consultants until one became the familiar and trusted advisor.

We began to understand outsider identity as a considerable aspect of the “safe space” dynamic in facilitative pastoral consultation. The Director’s (my) apprehension about consultants continuing with their assigned teams gave way to this significant relational driver. Collaboration is a pleasant sounding state of affairs that nevertheless involves laying aside fears, accepting vulnerability, building trust, building protocols for dealing with failure, and indeed sometimes facing up to personal or collective demons. During our early enrollments, especially in personal interviews, discernments, and planning sessions, I witnessed pastoral ministers and staff persons sharing highly personal confidences, sometimes as early on as the second or third session. Learning plans would sometimes be submitted as confidential documents, especially when the learning—as would happen occasionally—involves therapeutic work, personal or marriage counseling, or interventions.

Later I will illustrate typical learning experiences, including ones that involve group dynamics among staffs. The importance, however, of the safety dynamics is that they also allowed INSPIRE consultants and leaders to learn what it takes to grow collaborative pastoral leadership and understand what it looks like in practice. That is, consultants were the front line observers when persons and teams dealt with threat, eschewed face saving routines, tempered passions for the supreme importance of their own particular ministries, and learned the collaborative arts of give and take, budget paring, co-accountability, and making space in programs and public events for another’s contribution and recognition.

**Early “Signs of Success”**

A consultant reporting on work with a pastoral staff during the project’s second and third years provides a typical scenario of staffs on their way to becoming teams. It shows the ways consultants engaged with staffs after learning plans were built, the exceptionally wide range of learning commitments, spirituality dynamics, “healthy parish” imagery, and the moments of struggle that persons and team confronted rather than avoided.

Personal learning plans included activities such as spiritual direction, mentoring

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19 The decision to allow consultants to continue with their teams was a trade-off. Often continuance meant that teams would hire a consultant to provide training, team formation activities, retreats, coaching, and so on. The danger would be creation of consultant accountability to the client as a provider, potentially clouding the consultant’s facilitative perspective or mitigating the consultant’s ability to give direct and honest feedback. Now the consultant could be in the position of needing to please the client rather than challenge at points of disengagement or impasse. Impasse, we shall see later, is a critical milestone marker for many teams when they get close to true collaboration behaviors.

20 Participants would be advised that consultants would normally review their notes with the project director, but were allowed to designate information that would not be shared in this way. Consultant-director coaching and review meetings were treated as confidential matter.
and coaching in leadership, gym membership, chiropractic care, spiritual retreats, young adult conference, jazz guitar lessons, attendance at the PAAC Conference, and the purchase of a bicycle.

The principal consultant engagement consists of meeting with the team on a regular basis for the first three months after the discernment process to create their group and personal learning plans. Once the learning plans were in place, I facilitated their overnight retreat. Then we met every two months for a time for them to share their personal learning/growth with each other; to review the learning plan to make sure we were still on the right track; and for them to step back from their daily tasks to re-focus their attention on their INSPIRE goal.

Major achievements for [Parish Name] includes creating stability and good will in a team that underwent (1) frequent change in staffing and (2) working through strife that existed between two team members.

Significant obstacles for [Parish Name] include the team addressing a feud between a long time team member and a new team member. These two team members had different ideas on how the parish should operate. Their personalities clashed but nobody wanted to talk about it, including the two parties involved. After completing some of the activities the new team member commented that it was much easier to work with the other team members when you get to know them on a personal level, not just professional.

The team teaches us about collaborative pastoral leadership by reminding us that to work collaboratively, parish teams needs to spend their work time both serving parishioners and working on building the inner team structure and dynamics. Doing both helps ensure a healthy parish, creating a healthy Church.

As a Parish Consultant, I’ve learned that each person on a team wants a variety of things from their work – fulfillment, appreciation, fair pay, to feel like they are an important part of the group – that they make a difference in the group – that the group would be “less than” if they weren’t there and mostly each person is focused on serving the Lord.\footnote{The full consultant report appears in the project’s 2007 Annual Report.}

In the early years, the project gathered consultants to share observations about the process and perceived outcomes. By the beginning of 2007, an overnight consultant “pullaway” allowed consultants to distill learning from the first two and one-half years, after the first eighteen pastoral staffs had enrolled.\footnote{Staffs were enrolled in cohorts of six parishes, one from each of the archdiocese’s vicariates. They varied in size from six persons to nineteen persons, in compositions that in some cases included parishioners working in volunteer capacities.} Following is a sampling from director and consultant perceptions of what collaborative expressions of pastoral leadership look like in everyday practice.
• “They pray together, plan together, and talk mission. There are several instances of joined work going on at one time. Individual persons say they feel supported, challenged, sustained by their colleagues. People can ‘come to work’ and know they can bring their own spirits along.”
• “…I see first of all a sense of safety and trust in the group. Therefore they are not fearful of feedback.”
• “…high—or good—energy in the group.
• “A collaborative leadership relationship exists when both leader and followers base their interactions, efforts and planning on a true sense of ‘communio’.
• “[Team members] who understand the overall picture and see how their ministries are related…, mwho do not see ‘competitors’ but ‘collaborators’.”
• “A team that…, isn’t afraid to bring up risky topics or make honest comments…, they know how to disagree and make something useful happen.”

The project’s feedback system advanced significantly as a web-based reporting system came online and teams developed their inter-net skills. Some teams designated a reporter who would get written reports to log or who would interview team members at the computer desk. Individuals and teams were asked to log in to the private area of www.inspireproject.org and enter “Three Sentence Reports.” We made the process secure and user friendly, and of course, the entry window for the three sentence deliveries would simply scroll infinitely past that level. Fairly often people would get on a roll; some reports lengthened to over five hundred words, giving us rich detail. The project’s narrative storage system counts almost four hundred personal and one hundred fifty team reports, and one hundred learning plans entered electronically. Following are two sample reports that illustrate the two kinds of learning:

REPORT ON TEAM LEARNING received March 2, 2010
your_name: xxxxx xxxx xxxx
parish_or_organization: xxxxxxxxxxx Parish
phone: email_confirm: xxxxxxx@xxx.com
learning_type: Personal Integration
experience: Team Reflection
confidentiality: Not Confidential
share with consultant: Yes

Personal_Experience: Yesterday (March1) we had a Inspire-team meeting and we discussed serious issue that was holding the staff back in making important decisions for our community of faith. As a Hispanic, I was not sure how to use or understand the idiom "the elephant in the room". As a result of our meeting and open discussion led by Carol (parish consultant), the team could openly discussed a big issue that was always present in our staff meetings but overlook as a problem by us as a team. As a result I feel more equipped to deal with the situation. I feel liberated somehow. Thank you so much for this opportunity. I think is great!
REPORT ON PERSONAL LEARNING received March 2, 2010

your_name: xxxxx xxxx xxxx
parish_or_organization: xxxxxxxxxxx Parish
phone: email_confirm: xxxxxxx@xxx.com
learning_type: Personal Integration
experience: Team Reflection
confidentiality: Not Confidential
share with consultant: Yes

Personal_experience: One result of our group process, evaluating and clarifying staff roles and responsibilities, was an expansion of my position in the parish. Our consultant, Tony Colontoni, suggested that I would benefit from some coaching as I began to assume this new role. Tony assigned me some reading, asked me to take notes, and use my notes to help me prepare, in particular, for meetings. We also did some exploration of emotional intelligence models to help me identify ways that I would be more effective (and happier!) in my new role.

The work has proven very helpful. I am learning techniques that help me actively listen, keep my emotional responses in check and influence my colleagues. My confidence has grown, which helps in situations that I would previously have found threatening.

Tony has helped me think about "keeping it down here" -- his shorthand for leveling out my emotional responses, especially to adversity. This has proven to work very well in conjunction with another aspect of my INSPIRE personal growth work: Pilates classes. Pilates has helped me regain my center physically -- and that helps me hold on to my center emotionally.

With the Endowment’s award of a Sustainability grant in 2009 we were able to craft a number of reporting routines that followed pastoral teams through application, discernment and enrollment, development and closure. Teams filed quarterly expense reports, which could be submitted online. Consultants also filed electronic activity reports and team development reports quarterly.  

Indicators of Collaborative Pastoral Leadership
The early 2007 meeting produced the first iterations of a “baseline” description of pastoral leadership expressed collaboratively. It was applied as a team self-study tool that year, then applied in later years as a recurring inventory to help teams discern and measure perceived growth. Following appear behavioral statements from the INSPIRE Baseline Survey:

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23 Any of these forms and tools are currently available from the project office. Arrangements will be made for access through Loyola IPS after 2013.
24 The Baseline Survey appears as an addendum to this report. Teams also used a self-measurement tool, “Are We Team Yet?” that was developed by INSPIRE parish consultant Phyllis DiFuccia.
INSPIRE Baseline Survey

Please use the scale below to answer questions 1-16 about your parish staff:

1) We do this poorly    2) We need to further develop this
3) We do OK             4) We do this well         5) We do this extremely well

As a team, how well do members of your Pastoral Leadership Team…

1. _____ support each other’s spiritual growth?
2. _____ handle disagreement among team members?
3. _____ deal with undesirable outcomes or failures?
4. _____ communicate expectations of each other’s performance?
5. _____ explore and develop new ideas?
6. _____ engage in conversations about the mission of the parish?
7. _____ recognize achievements of staff members?
8. _____ say “thank you” to one another?
9. _____ say “I’m sorry” to one another?
10. _____ forgive one another for past hurts?
11. _____ prepare for meetings?
12. _____ collaborate in pairs or small groups to address common needs or issues?
13. _____ tell the truth to another?
14. _____ keep one other informed about each other’s work, goals, successes, challenges?
15. _____ constructively share feedback and perceptions about each other’s performance?
16. _____ hold one another accountable for important tasks?

Please use the scale below to answer questions 17-33 about your parish staff:

1) Strongly disagree  2) Disagree  3)Neither agree nor disagree  4) Agree  5) Strongly agree

17. _____ Our pastoral leadership team consistently supports the work that I do.
18. _____ As a staff, we are in agreement about the qualities of an effective pastoral leadership team.
19. _____ The pastoral leadership team shares a common vision for the parish.
20. _____ There is much work to do to get us to the point of being a effective pastoral team.
21. _____ We need to learn better ways to collaborate with one another.
22. _____ I set aside time to participate in professional, ministerial, or personal learning activities.
23. _____ Our pastoral team is more a staff of individuals than a leadership team.
24. _____ Members of our team don’t feel safe to speak about difficult topics.
25. _____ I often feel stressed or overwhelmed by my work here.
26. _____ I struggle to relate well with one or more members of our pastoral team.
27. _____ Each of us knows how his or her work fits into the pastoral mission of this parish.
28. _____ I need a better perspective of my contributions to the pastoral team’s effectiveness.
29. _____ Our staff openly discusses issues that challenge our effectiveness as a team.
30. _____ We do a good job of sharing our knowledge and experience with each other.
31. _____ There is good coordination between my ministry and other ministries here.
32. _____ So that I can minister effectively I regularly work on personal and physical wellness.
33. _____ I can name specific ways that each team member contributes to our overall effectiveness.
Consultation Resources and Services

Over nine years the project produced other discernment and evaluative tools in addition to the Baseline Survey. Some were use prior to a team’s enrollment. Structured interviews during the application process, built so that responses could be reviewed in a matrix format, gathered intake data and matter that could be analyzed by the consultant and fed back to team members. Team members retained the right to hold the responses as confidential or share them with their team members. The “Joy/Burden Interview” developed by consultant Barbara Kerkhoff became a particularly important early learning resource. Each interview session began with a brief scripture reading and an invitation to prayerful reflection. Three pairs of queries plumbed for first responses and second-level explorations about what ministerial experiences energized or drained, animated or dulled, produced feelings of joy or burden. That interview often deepened client-consultant trust. In many instances it set up subsequent consultations that prompted personal discoveries or disclosed revelations that generated important integrative learning commitments.

To further assure safety, consultants assessed and reported scoring of the Baseline Survey to their teams in confidential sessions. Prior to her work with INSPIRE, consultant Sr. Phyllis DiFuccia developed another instrument, “Are We Team Yet?” It generated safe-space discussions of perceived limitations, fears, and blockages. Moreover, it affirmed achievements and spurred renewed commitments. “Are We Team Yet?” identifies stages of team development and points of resistance or plateaus. Late in the project, consultants administered this team survey at calendared check-points to help teams perceive progress and identify blockages.

Dr. David DeLambo brought to the project a listing of community development indicators that harkened back to the National Pastoral Life Center at Notre Dame led by Fr. Phillip Murnion in the 1980’s. David and Dr. Marti Jewell updated the indicators during the Emerging Models of Pastoral Leadership project. David also helped us devise a consultant-administered Parish Vitality survey among our first 30 parishes. It helped us measure the linkages between collaborative pastoral leadership development and healthy dynamics of Catholic parish communities.

During the project’s fifth year, the project director and consultants applied the perceived pastoral collaborative behaviors to deeper descriptions of what goes on in a “Pastoral Leadership Team.” Two consultants developed a list of collaborative pastoral leadership “indicators.” Their scenario adopted Ronald Goleman’s Emotional Intelligence framework. Director and consultants then added specifically pastoral language, including several new skills and behaviors. In particular, they added a new set of competencies headlined as “Build Safe Space—explicit team agreement to work toward ‘no blame’ practice.” Seven new competency assertions followed. The criteria

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25 See Addendum “C”.
26 The interview and a sample matrix used in consultant training appears as addenda.
27 The Parish Vitality survey was a creation of institutional necessity. Archdiocesan leadership would base the decision to provide financial support of the project’s sustainability phase on reporting of discernable enrichment of parish life. We needed criteria developed away from the project. Emerging Models, another Lilly funded SPE project, gave us a historically vetted set of national indicators. INSPIRE parishes reported significant levels of parish development referenced to the Emerging Models vitality indicators. That work, conducted from late 2007 forward, also increased our attention to linkages between pastoral team development and parishioner leadership development, and renewed awareness and widened ownership of parish mission, vision, and values.
document contextualized the indicators by declaring “INSPIRE values” ascribed to the project learning agenda:

- Collaborative pastoral excellence
- Personal and team learning
- Leadership development
- Sharing faith
- Sharing learning
- Parish Mission

Pastoral teams discerning enrollment during the INSPIRE Sustainability period, 2009 ff., were required to review the project’s new document, *Criteria for Collaborative Pastoral Leadership Teams*. By enrolling, they would dedicate themselves to the adopting its values, skills, and behaviors. They would also agree to become the subjects of study.

The project would build resources from many of these tools. Five consultation modules serving priorities for vital parishes are still available to parish pastoral teams and to parishioner leaders from experienced INSPIRE consultants. They are:

- Discovering Parish Mission
- Breaking Down Silos
- Deepening Spirituality for Parish Leadership
- When Task and Ministry Collide
- Serving Transitions

Supported by INSPIRE, the Archdiocesan department of Personnel Services serves parishioners, staffs, and pastors during pastor transition. Liturgical Press recently launched three INSPIRE-developed Pastor Transition guidebooks for national distribution.

**Parish Consultant Pathway and Performances**

By 2008 the project stakeholders were completing the original SPE grant programming and preparing for the “Sustainability Program” and enrollment of six new parishes and reenrollment of two more. (We elected to support and continue following two enrolled parish teams that were experiencing mergers with other parishes.) A pathway document (on next page) showing consultant/pastoral team interaction had gone through several iterations. When the project was first prepared for proposal to SPE, the designers assumed that teams would move through the process in about one year. If moving to collaborative leadership were only a rational adjustment, a matter of understanding and adopting new skills and weekly schedules, that time span could be more than adequate. Add the factor of the emotional intelligence that collaboration demands, however, and the pathway projection extends to two to three years. Moreover one must anticipate occasional regressions, stalemates, and avoidance episodes; the process includes these looping

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28 Attached as Addendum “D” is the Criteria statement as used in the INSPIRE application packet, 2009 ff. INSPIRE consultant Barbara Kerkhoff and I revised the document that applied the original Goleman framework. Upon request I will make available a color-coded iteration of the Criteria revealing project-specific inserts and edits. The original Goleman framework and several other resources are available at the Emotional Intelligence Consortium website: www.eiconsortium.org and http://www.eiconsortium.org/pdf/emotional_competence_framework.pdf
back dynamics and in our experience is never a straight-line progression. Consultants plan to be present to the staff frequently over the first months, and then infrequently and through distance-consultation such as phone conferencing over the several months that follow. In final form developed in late 2009, the following one-page pathway replaced more complex versions that detailed events and contingencies.29

29 INSPIRE parish consultants Dr. Ron Rojas and Sr. Phyllis DiFuccia made important contributions to the way all consultants would understand and subscribe to the pathway. Kevin Chears during an IPS internship with the project, met with consultants and project leaders, and executed the final design. Ms. Chears is now pastoral associate at St. Gertrude parish, Chicago, an early “INSPIRE parish.”
Project INSPIRE Consultant Engagement with Parish Team

Legend:
- Start or end of a stage of the Consultant cycle
- Process stage within the Consultant cycle
- Decision point within the Consultant cycle
- Document created within Consultant cycle
- Capture of data related to the Consultant cycle
- Connector: a solid reflects direct relationship; a dotted line indicates influence on a step or stage; a curved indicates a non-linear relationship between stages.

Order of the stages:

1. [Diagram showing stages and relationships]

**ENGAGEMENT**
- Parish applies or is referred to Project INSPIRE
- Consultant enters into relationship with the Parish Team

**EXPERIENCE and OWNERSHIP**
- Individual Team Members begin to implement their learning plan with spontaneous and formal updates to the Reporting tool
- Individuals and Teams utilize collaborative engagement skills
- Team Begins to implement the Learning Plan with spontaneous and formal updates to the Reporting tool

**LEAVE TAKING**
- Team and Consultant engage in a group reflection/discernment process
- Sustainability Covenant is developed

**Developmental Phase**
- Parish applies or is referred to Project INSPIRE
- Consultant enters into relationship with the Parish Team
- Director engages the Parish
- Director Selects Consultant
- Parish Team members and Consultant with focus on the individual
- One-on-One Discernment meetings between Parish Team members and Consultant
- Parish Team and Consultant continue the One on One discussions
- Personal Learning Plan is developed
- Group learning plan is developed
- Consultant and Individual Team members complete a shared reflection exercise
- Parish Team decides to enter into a Covenant for Collaborative engagement
- Parish Team and Consultant meet to develop a group focused plan
- Sustainability Plan is developed
- Consultant and Individual jointly decide what should be entered into the Reporting Tool
- Reports Generated

**Implementation Phase**
- Parish applies or is referred to Project INSPIRE
- Consultant enters into relationship with the Parish Team
- Director engages the Parish
- Director Selects Consultant
- Parish Team members and Consultant with focus on the individual
- One-on-One Discernment meetings between Parish Team members and Consultant
- Parish Team and Consultant continue the One on One discussions
- Personal Learning Plan is developed
- Group learning plan is developed
- Consultant and Individual Team members complete a shared reflection exercise
- Parish Team decides to enter into a Covenant for Collaborative engagement
- Parish Team and Consultant meet to develop a group focused plan
- Sustainability Plan is developed
- Consultant and Individual jointly decide what should be entered into the Reporting Tool
- Reports Generated

**Evaluation Phase**
- Parish applies or is referred to Project INSPIRE
- Consultant enters into relationship with the Parish Team
- Director engages the Parish
- Director Selects Consultant
- Parish Team members and Consultant with focus on the individual
- One-on-One Discernment meetings between Parish Team members and Consultant
- Parish Team and Consultant continue the One on One discussions
- Personal Learning Plan is developed
- Group learning plan is developed
- Consultant and Individual Team members complete a shared reflection exercise
- Parish Team decides to enter into a Covenant for Collaborative engagement
- Parish Team and Consultant meet to develop a group focused plan
- Sustainability Plan is developed
- Consultant and Individual jointly decide what should be entered into the Reporting Tool
- Reports Generated

**Realization Phase**
- Parish applies or is referred to Project INSPIRE
- Consultant enters into relationship with the Parish Team
- Director engages the Parish
- Director Selects Consultant
- Parish Team members and Consultant with focus on the individual
- One-on-One Discernment meetings between Parish Team members and Consultant
- Parish Team and Consultant continue the One on One discussions
- Personal Learning Plan is developed
- Group learning plan is developed
- Consultant and Individual Team members complete a shared reflection exercise
- Parish Team decides to enter into a Covenant for Collaborative engagement
- Parish Team and Consultant meet to develop a group focused plan
- Sustainability Plan is developed
- Consultant and Individual jointly decide what should be entered into the Reporting Tool
- Reports Generated
In practice, the enrollment and “engagement” work would take several weeks to complete. Individual team members would enact most of the personal learning work and then report to the project or the consultant. Over longer periods, however, consultants would mentor, coach, or counsel one or more persons on their teams. It would not be uncommon to see personal learning plans reevaluated and rewritten. Common team learning activities included consultants observing team meetings and debriefing the dynamics with their teams. Typically, team development would take well over a year to achieve collaborative behaviors a team could claim as routine.

The pathway should not be read as a straight-line progression. In practice there would commonly be cycles of engagement and disengagement, and teams would often be tempted to return to their “real work” patterns of isolation and task-oriented performances. (“The difference between consulting with Fortune 500 organizations and parishes….,” reported one consultant, “parishes are slow.”) Being busy, or being too busy to “do their INSPIRE work” was a commonly reported blockage, often informally noted as a greeting when a consultant walked into a team meeting room for a check-in consultation. The phenomenon of pastoral ministers’ task-orientation was the project’s number one finding, reported our first INSPIRE Research Professor, Dr. Brett Hoover.

Thus, there would be occasions of deconstructing blockages and moving toward reorientation. Moments of tacit avoidance or outright impasse would occur. Teams would “get stuck” (as one consultant called it) or lose energy and withdraw. Consultants could be tempted to see this as a failure in their own performances and, like the teams, gloss over the stalemate episodes in their reports. Not all parish teams would make the pathway’s final “swim lane” when closures and commitments would be formalized. Over time most consultants became familiar with the backing-off behaviors, and we realized that many times a consultant could see the forestalling behaviors begin to form. They would work for the right moment to point out curious behaviors, silences, comments, and ask their teams, “What just happened?”

Pastoral team members recognized that such moments would require potentially painful and time-consuming engagement, often about facing up to conflictive or failure episodes. However, we began to understand that impasse itself was many times an opportunity or gateway to a team’s learning the arts and conversations involved in managing conflict, negotiating, holding persons and relationships in safe space, achieving dialogue and best practice commitments. An early-enrolled team actually asked their consultant to help them build and then lead an overnight retreat that would allow them to acknowledge and reconcile their scapegoating of a senior team member. Such are the predictably unpredictable passages that lurk below the neatly arranged pathway scenarios constructed over the project’s nine years.

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Naming Parish Consultation Performances

Near the end of the project’s work with consultants I attempted a formal inventory of performances that appear critical to parish consulting. As the project approached closure, a comprehensive gathering of these performances was incomplete. This report concludes with commentary on my attempt to expand that overview and make it available for review, evaluation, and application. The broadened inventory, available as an addendum to this report, articulates basic performances with critical reference to consulting in a church environment at the parish level. The INSPIRE Consultant Performances Inventory attempts to answer the question, “What do parish consultants do?” As the inventory matures outside of the INSPIRE context, it can inform creation of parish consultant evaluation tools, and it may serve to guide development of educational programming that prepares persons for the work.

The broad answer to “What do parish consultants do?” references typical OD consulting in any corporate or NGO setting. Facilitative consultation fosters interdependence, alignment, and coordinated execution. It points clients to the corporate mission and assists them, as they order themselves and the work they do, toward some resolution or some change that serves common goals or mission. Consultants seek shared perceptions, agreements, declarations of intention, and commitments. They may assist persons and even hold them accountable as they build structural arrangements and personal capacities that contribute to common mission.

The role of Parish Consultant as it evolved during INSPIRE, however, exhibits some critical differences. One is the starting point. Organizational development literature tends to conceive consultation as a skilled response to a client’s presentation of a problem. Awareness of big problems can surely be the case in any church setting, as any pastor or minister can attest. The Lilly Endowment SPE program, however, challenged project stakeholders to attract pastors and ministers who are perceptibly successful and then “sustain” their excellence. INSPIRE consultants thus began with a process that acknowledged their clients as persons and teams of “pastoral excellence.” The “learning plan” agenda introduced reflections on personal and team integrity. Clients more immediately understood themselves as part of a success story than seeing themselves as part of a problem. This may be another factor in the phenomena of unusually rapid trust building between project consultants and their pastoral team clients. In most cases that bonding became a critical resource, as consultants and then clients later detected and acknowledged “elephants in the room” and other face-saving or avoidance dynamics that forestall truly collaborative team development. Teams and consultants could then leverage the

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31 The project had been blessed with the participation of a very special intern from Loyola’s Institute of Pastoral Studies. Kevin Chears came to us with extensive top-level executive experience for a “Fortune 100” financial firm. Her vitae included significant responsibility for training and development of working teams. Kevin offered critical guidance as we formed the pastoral leadership team development pathway. As the pathway work generated commitments and processes to guide consultants in their work, Kevin also helped us identify best practices and competencies that detail facilitative consulting in parish settings.

32 Block, op.cit., approaches the goals of consulting in terms of the consultant acting as “expert” or “an extra pair of hands” or taking on a “collaborative role” in problem solving (19-29). Johnson and Stroh, op.cit., allow that an expert or a facilitative consultant may be asked either to assist a project or to solve a problem. At the point of beginning a consultative implementation, they posit the work of “diagnosing the problem” and defining the problem as it may play out at different organizational levels (60-67). Setting the question in terms of a stated “problem” allows an initial separation between the client and an objectified “problem.” When the consultative focus eventually delves into the systemic issues, that separation usually becomes untidy, and clients themselves must learn how they themselves participate in the problem.
trust and safety dynamics they had established early in the process. This relational positioning and a bank of several years’ worth of aggregate knowledge about the potential for struggle informed how we would begin the consultant performances inventory and organize the categories summarized below.

**Collaborative Pastoral Excellence** Consultants provide the grounding and energy for pastoral team development by structuring experiences, discussions and reflections that grow pastoral team leadership. Consultants seek commitments of confidentiality and arrange interviews and meetings built for conversation, reflection, and discovery. They coach or teach approaches to healthy group process and meeting skills that serve communication and conflict management. They promote self and team identity as pastoral leaders. Over time consultants transfer responsibility for monitoring and accountability from themselves to the team.

**Interpersonal Competence** Consultants apply strong relational skills to individual counseling and facilitation of group activities. They establish positive working relationships that inspire trust, mutual respect, transparency, and honesty. They use active listening and observation of nonverbal communication to feed perceptions back to a team and then invite interpretive discussion. Consultants model and assist development of emotional maturity. They also make use of professional coaching or mentoring relationships to assess their own actions and intentions.

**Change Agency** Consultants act as catalysts and guides. They help team members understand their pastoral leadership as a unique skilled stewardship of small and significant change in the lives of persons and in the community. Consultants demonstrate personal *savior faire* for the process, motivate by modeling, and affirm and debrief small and significant achievements on the pathway toward collaborative pastoral leadership. They seek out and recommend to their teams persons who can act as resources to team members, such as senior mentors, executive coaches, and pastoral leadership teams from other parishes.

**Personal and Team Learning** Consultants assist persons and teams as they form specific intentions to grow personal and team integrity, spirituality, Catholic sensibility, and skills that serve parish work. Consultants promote transformative learning experiences: reflection that suspends assumptions; immersion into the vast resources of Christian spirituality and tradition; practice in the art of slowing down one’s thinking so to engage reflection, inquiry, discussion, conversation, and dialogue. Pastoral team members broaden their understanding of learning: learning means building new or deepened skills, but it also means learning to understand and appreciate each other; learning may involve solitary study or therapeutic work, but it also includes times for play and social interaction. Learning focuses on “the work we do together,” parish and Church mission. Learning breeds pastoral imagination.
Leadership Development Consultants help persons understand themselves as leaders and stewards of leadership within the community. They share perceptions of leadership as a widely shared transformative resource in healthy parish communities. Through consultant teaching and coaching, community development exercises like scenario planning, town hall nights, peace circles, and small group process, pastoral ministers rehearse expanded performances of pastoral leadership. Consultants help them construct ways to share spotlight, podium, and joint programming responsibilities as they learn to take delight in collaborative expressions of pastoral leadership.

Sharing Faith and Spirituality Consultants model attractive, accessible approaches to spiritual practice. They seek to learn and appreciate the spiritual traditions of other cultures. They help pastoral team members build spiritual sharing practices that bridge gaps between levels of theological learning, sophistication, and culture. They challenge overly busy ministers to make room in their days and weeks for spiritual exercises. They connect persons to centers and resources that provide spiritual direction, retreats, reading, and networking.

Parish Mission Consultants facilitate the appropriation of parish mission, vision, and values to learning, parish programming, worship, education, and social outreach. They inspire conversations about call and baptismal identity that ripple throughout the parish community. They ask questions about preferred futures, plausible commissions, community assets, and the human needs residing within and without the parish boundaries. Teams learn to grow and declare institutional identity that orders and provokes expressions of pastoral imagination.

The inventory is selectively focused on performances that make parish consulting unique, and proposes evaluative markers essential to this field of work. A list of consultant “proficiencies” on the inventory identifies expertise in organizational development, leadership studies, and organizational psychology as preferred. Those assets are the basis of any kind of organizational consultation. In that perspective the parish consultant performances profile isn’t that different from other specifications of organizational consulting. Most corporate consultants are selected because they have “been there.” They know the industry or enterprise, its values and culture, in which they seek contracts or are called upon to work. Early in the project, we contracted with consultants with significant OD credentials and experience but no on-the-ground experience in ministerial or parish employment. We watched as they completely missed important clues in the power dynamics, the spiritual and cultural contexts, veiled assumptions, and unwritten rules of engagement in church and parish ministry.33

33 What are those clues? This could be fodder for several dissertations and studies. Consultants with church experience could discern fairly quickly different levels of theological or ministerial sophistication, orientations toward spirituality, piety, social mission, and so on. Language used in conversation might be peppered with reference to scripture, missiology, or doctrinal interpretations. Tensions between ministries, and the filters through which a young associate pastor, the DRE, the liturgist, the youth minister, the school principal, the deacon, and the pastor, who was ordained in the early years of Vatican II, view “the most important work” are, we learned, not so transparent to the outsider. Different roles bring different daily and weekly rhythms. The youth minister’s day moves into high gear as the principal’s day, which began at 6:00 a.m., winds down. Most edge toward 6-day weeks approaching 60 hours on-site. H-R rules for part-time employees may be routinely bypassed, as the employees themselves choose to work beyond their contracted hours.
Before closing, I want to address one of the unchecked assumptions I observed about parish consultation as it played out throughout the project. I believe it still persists as we attempt to hand it on for adoption in other settings and circumstances of church and parish life. The “it” we have long attempted to secure for future applications is not INSPIRE! As systems-oriented practitioners, and (some of us) as practical theologians and social researchers, we understand that the project’s focus was specified and limited by the scope of work promised to our sponsoring Endowment.

Sustaining Pastoral Excellence (SPE) sought project proposals to support the pastoral excellence of pastors. As I described earlier, designers of INSPIRE audaciously attempted and achieved an expanded focus: they presented INSPIRE as a project to sustain not only pastors, but their staffs of associates, lay persons, and in some cases lay parishioner leaders, and then to strengthen the bonds that join their ministries. Even so, the project was able to address but one sector of the parish systems in one specific effort: to transform parish staffs into “pastoral leadership teams.” The project’s purview excluded parish council and the myriad “lay ministry” and social organizations that drive parish life and mission.

In practice, moreover, organizational consulting typically has more a limited scope and short-term engagement, e.g., to assist resolution of conflicts, to help organize a program or build planning, to organize a strategic transition, or just to improve the ways that staff or team meetings are prepared and conducted. In church settings, any of these less intense consultative engagements can benefit from what we learned about parish-focused organizational consulting.

As the project neared completion, in fact, we were able to respond to a number of requests for limited services. Besides the workshops on pastor transitions still being conducted in the Archdiocese, the project has produced and makes available four other modules and workshops. INSPIRE Consultants assist transition events, organize strategic plan development, design or facilitate staff retreats, support mission assessment and updating, facilitate conflict management, provide executive coaching for pastors or administrators, and assist inter-parish projects, and facilitate a city-wide non-violence networking partnership. We believe there are many pathways and shorter-term consultation services that can draw from what we learned. We propose that there are already persons who work in ministry settings who could be trained or certified for specific consultative services.

We also would like the pastoral education community to understand—and our consultants are themselves witness to this—that consultation in church settings can support a meaningful life-work dedication and be a rewarding career with life-sustaining income projections. We strongly suspect that such educational and formational enterprise will require collaboration with schools of business and executive development field programs. INSPIRE succeeded in building a small community of learning and praxis about parishes and those who lead in parish communities. We will work to continue and grow that community of learning and practice, and here I must add our deep appreciation for our international partners from Germany who ask probative questions and

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34 At several points of evaluation, SPE Director and the Endowment’s religion program Director expressed gratitude for the expanded participants engagement. During the final national gathering of SPE projects, several representatives from non-Catholic denominations attended the INSPIRE presentation.

35 See page 20 of this report.
model the way for us. (They represent the CrossingOver program and a new Center for the study of pastoral care in German parishes, and the Ruhr University Bochum, with whom Loyola University Chicago has forged a formal relationship.) We passionately believe there is more to learn, networks to grow, and with respect to this paper’s focus, that there are many more ways to design and apply organizational consultation in church settings.
Bibliography

Principle works referenced in report currently in print. Later editions available for many.


Several workbooks and resources complement this text.

Go to Home page for Source material and several Emotional Intelligence scales and tools, articles, etc.


[http://www.INSPIREproject.org](http://www.INSPIREproject.org).
Project Home Page, see also www.luc.edu/ips


**Addenda**

*This paper is distributed electronically for the INSPIRE Milestone Conference at Loyola University Chicago, October 2013.*

For additional information about addenda, please contact Daniel Gast at: Danlgast46@gmail.com
ADDENDA

Addendum A [2 pages]

Sample Node Report, INSPIRE Data Review using N-Vivo software. Dr. Brett Hoover, January, 2011

OPEN CODED NODES WITH 10+ REFERENCES
(run 26 Jan. 2011; 2/3 of parishes represented, i.e., 26 of 41)

PRACTICES—POSITIVE IMPACT:
- Bridging cultures
- Care and support in team
- Coaching—expert help
- Collaborative decision making
- Common language on things
- Communication skills—working on
- Community outreach
- Convocations of INSPIRE parishes
- Delegation
- Empowerment or sharing power
- Gifts—recognition and complementarity
- Informal time space
- Larger church
- Lay leadership
- Mission conversation
- Pastoral vision
- Planning
- Professional development
- Reading for work
- Regular staff meetings
- Self-care of leaders
- Sharing responsibility as a team
- Skill building of team
- Small faith communities
- Spiritual development (personal)
- Spiritual formation of team

OBSTACLES—NEGATIVE IMPACT:
- Busyness and task orientation
- Conflict resistance or lack of open discussion
- Divisions or tensions on team
- Financial crisis
- Power asymmetry/abuse

PRACTICES—AMBIGUOUS IMPACT:
- Financial help from INSPIRE
- Healing or no healing from trauma/stress
- Pastor’s leadership
- Parish-wide events
- Spirituality or lack of it in leadership
- Use of instruments or tools

CONDITIONS—AMBIGUOUS IMPACT
- Infrastructure/building challenges
- Lay staff team transitions
- Pastor or priest transitions
- Transition or change

RELATIONSHIP TO PARISH MISSION:
- Hospitality or evangelization
- Mission conversation
- Pastoral vision
- Planning
COMMENTARY on Coded Nodes:

- Because not all parishes have professional staff, we use the more generic term “pastoral leadership team.” Thus, “team” above could be either professional or volunteer team members. The practice may extend beyond those team members involved with INSPIRE, but it includes them.

- The number of coding instances reflects the number of times the practice is referred to in source documents. Parishes have different numbers of source documents. Some parishes have provided better case studies (and thus led to more attention from INSPIRE personnel), and some team members were more responsive with reports. Some consultants were more responsive with reports. Thus, coding instances do not relate directly to the number of parishes who engage in a practice.

- Coding instances could be specific practices, general practices, or conditions that impact leadership in parishes. This is based on their appearance in the source documents.

- Some practices are listed here as having a positive impact because they were judged so by team members or consultants or because source narratives demonstrate the positive outcomes associated with them.

- Some practices are listed here as ambiguous because, according to the accounts of team members and consultants:
  - They have ambiguous effects on the interdependence of the team and the mission of the parish (e.g., pastor’s leadership, use of tools or instruments); or
  - They categorize a practice though to be effective or its clear absence (e.g., healing or not from trauma/stress, spirituality in leadership or the lack of it).

- Some of these may require more nuance and/or explanation. For example:
  - Bridging cultures needs to be broken down into more specific categories.
  - Pastor’s leadership refers to the strong presence of a pastor as leader.
  - Spiritual formation is specifically that done with the pastoral leadership team by pastor or outside expert.
  - Use of tools or instruments refers to the use of professional development and group process tools by the team, often originating with the consultant (e.g., Myers-Briggs Personality Inventory, certain conflict resolution programs).
Addendum B [3 pages]

Date of this survey: ___________________________  Vicariate: ______________

INSPIRE Survey

Thank you for taking this survey. Your anonymity will be respected.
If you are not sure how to answer a question, please leave it blank.

Please use the scale below to answer questions 1-16 about your parish staff

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>We do this poorly</td>
<td>We need to further develop this</td>
<td>We do OK</td>
<td>We do this well</td>
<td>We do this extremely well</td>
</tr>
</tbody>
</table>

As a team, how well do members of your Pastoral Leadership Team…

1. _____support each other’s spiritual growth?
2. _____handle disagreement among team members?
3. _____deal with undesirable outcomes or failures?
4. _____communicate expectations of each other’s’ performance?
5. _____explore and develop new ideas?
6. _____engage in conversations about the mission of the parish?
7. _____recognize achievements of staff members?
8. _____say “thank you” to one another?
9. _____say “I’m sorry” to one another?
10. _____forgive one another for past hurts?
11. _____prepare for meetings?
12. _____collaborate in pairs or small groups to address common needs or issues?
13. _____tell the truth to another?
14. _____keep one another informed about each other’s work, goals, successes, challenges?
15. _____constructively share feedback and perceptions about each other’s performance?
16. _____hold one another accountable for important tasks?

Please use the scale below to answer questions 17-33 about your parish staff

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly disagree</td>
<td>Disagree</td>
<td>Neither agree nor disagree</td>
<td>Agree</td>
<td>Strongly agree</td>
</tr>
</tbody>
</table>

17. _____Our pastoral leadership team consistently supports the work that I do.
18. _____As a staff, we are in agreement about the qualities of an effective pastoral leadership team.
19. _____The pastoral leadership team shares a common vision for the parish.
20. _____There is much work to do to get us to the point of being an effective pastoral team.
21. _____We need to learn better ways to collaborate with one another.
22. _____I set aside time to participate in professional, ministerial, or personal learning activities.
23. _____Our pastoral team is more a staff of individuals than a leadership team.
24. _____Members of our team don’t feel safe to speak about difficult topics.
25. _____I often feel stressed or overwhelmed by my work here.
26. ______ I struggle to relate well with one or more members of our pastoral team.
27. ______ Each of us knows how his or her work fits into the pastoral mission of this parish.
28. ______ I need a better perspective of my contributions to the pastoral team’s effectiveness.
29. ______ Our staff openly discusses issues that challenge our effectiveness as a team.
30. ______ We do a good job of sharing our knowledge and experience with each other.
31. ______ There is good coordination between my ministry and other ministries here.
32. ______ So that I can minister effectively I regularly work on personal and physical wellness.
33. ______ I can name specific ways that each team member contributes to our overall effectiveness.

34. How would you describe the current levels of stress for most parish team members?
   a. extremely stressed
   b. moderately stressed
   c. stressed but manageable
   d. low level of stress

35. How does your role in the parish affect your personal spiritual growth?
   a. has a draining effect
   b. occasionally has a draining effect
   c. is fairly neutral
   d. is generally a source of spiritual growth
   e. is a critical source of spiritual growth

36. How would you describe the work you do?
   a. As work comparable to other jobs or performances in my occupation or profession
   b. As work that is a job and somewhat a ministry
   c. As work that is equally a job and a ministry
   d. As work that is more a ministry than a job
   e. As a ministry

37. In your work, how much do you collaborate with other staff members?
   a. I perform my work separately, not in collaboration with others.
   b. I perform my work in minimal collaboration with others.
   c. I perform some of my work in collaboration with others.
   d. I perform much of my work in collaboration with others.
   e. I perform almost all of my work in collaboration with others.

38. To what extent do you want more collaboration with other staff members?
   a. I do not want more collaboration.
   b. I would like to improve collaboration with some staff members, but not all.
   c. I would like to improve collaboration with all staff members.
39. How would you describe the current growth in pastoral team development within your parish staff?
   a. not growing
   b. after some growth stalled
   c. growing slowly
   d. growing at a significant pace

40. How would you rate the current climate of interpersonal relationships among the parish pastoral staff?
   a. nonexistent
   b. impersonal
   c. generally courteous, polite, hospitable
   d. generally responsive and caring in times of need
   e. proactively caring and nurturing
“Joy-Burden Interview” for Personal Discernment and Matrix Report Sample

INSPIRE Exploration Process

The exploration is reflective and process-oriented, and invites the parish team to experience INSPIRE safe-space. The process provides formation in INSPIRE’s guiding principles and offers facilitation to support individual and group reflection and discernment.

DAY 1: JOY-BURDEN INTERVIEWS  (schedule 30 min. + buffer time for each)

**INDIVIDUAL REFLECTION**

Individual exploration is based on Isaiah 40:25-31 and Matthew 11:28-30 to convey that INSPIRE intends to lighten the burden of ministry. Consultant meets with each team member for 20-30 minutes and invites each person into the experience of INSPIRE through a time of reflection. Create a prayerful context, open with the scripture passages and brief personal sharing about them. Then ask for “first responses” to each. Take notes that you will share after interview.

- What is the focus of your labor... your work?
- To what do you give your energy?
- What is burdening you... making life heavy?
- What is exhausting you, depleting your spirit?
- What brings rest and comfort for you?
- How is your strength renewed?
- Tell me three things about St [xxx]

Provide no clarification for these questions and encourage person to respond as they choose.

*Note: The “piggyback” arrangement of nearly identical key questions is deliberate. It may cause some stress for the few who may notice the similarities. Be ready to express confident reassurance, and wait.*

At close of interview, repeat all responses to interviewee to check for accuracy, allow edits, and offer to send a copy of a person’s own responses back to him or her.

**Recommendation:** work to stay with the questions in the order they appear. They tend get us critical information early in the process.

Build a matrix for personal review and confidential assessment with INSPIRE Director.
## Sample Matrix Report: Joy-Burden Interviews for Personal Discernment

<table>
<thead>
<tr>
<th>REFLECTION</th>
<th>Pastor</th>
<th>Principal</th>
<th>Asst. Principal</th>
<th>Associate Pastor</th>
<th>Associate Pastor</th>
<th>Rel Ed</th>
<th>Pastoral Assoc</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What is the focus of your labor?</strong></td>
<td>• Lots of administration</td>
<td>• Pass on faith to children</td>
<td>• School Liturgies (new this year)</td>
<td>• Letting go: this is my last year at [St.x]</td>
<td>• Order &amp; shape of priesthood</td>
<td>• Enabler of catechists so they can echo God’s love for children</td>
<td>• Outreach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Make parents re-prioritize</td>
<td>• Reconciliation</td>
<td>• “I’m in training”</td>
<td>• “I’m in training”</td>
<td>• Enabler of parents</td>
<td>• Pastoral Care</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Get children back in church</td>
<td>• Prayer service for teacher (return to care for ill spouse)</td>
<td>• “DMin – Homiletics”</td>
<td>• Learning &amp; probing where each one is coming from</td>
<td>• Spirituality is key ingredient</td>
<td>• Train ministers of care</td>
</tr>
<tr>
<td><strong>To what do you give your energy?</strong></td>
<td>• Organization</td>
<td>• Example, trying to live Gospel message</td>
<td>• Eucharist: prayer for grace to get thru day</td>
<td>• Sacramental ministry</td>
<td>• Ministries that I don’t know about</td>
<td>• Transitions: especially as a dept.</td>
<td>• Bereavement</td>
</tr>
<tr>
<td></td>
<td>• Constitutions for PC &amp; boards</td>
<td>• Re-teaching: reminding faculty to treat each other well &amp; to love neighbor</td>
<td>• Multi-task (energizes me)</td>
<td>• Worship committee (new area)</td>
<td>• Administration</td>
<td>• Restructured 6 years ago – budget cuts – return to old model</td>
<td>• Wake services</td>
</tr>
<tr>
<td></td>
<td>• Finances</td>
<td>• “I love what I do – it’s a gift”</td>
<td>• “DMin – Homiletics”</td>
<td>• School/Rel. Ed</td>
<td>• Youth: Teens &amp; schools</td>
<td>• Administration</td>
<td>• Fall training sessions</td>
</tr>
<tr>
<td></td>
<td>• Building program</td>
<td>• Faculty are not as collegial as I would like (sense of family, camaraderie)</td>
<td>• Worship: legalese vs. creative</td>
<td>• Ministries that I don’t know about</td>
<td>• “Insiders &amp; Outsiders” tension</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• They are good people but become too isolated</td>
<td>• My perception of “negativity”</td>
<td>• “I’m in training”</td>
<td>• Withdrawal: “it’s like pulling teeth to work together”</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>What is burdening you... making life heavy?</strong></td>
<td>• Too much time spent on administration</td>
<td>• Faculty are not as collegial as I would like (sense of family, camaraderie)</td>
<td>• Worship: legalese vs. creative</td>
<td>• “I’m in training”</td>
<td>• “DMin – Homiletics”</td>
<td>• “Spirit is gone”</td>
<td>• Leadership transition has been hard “Wish we were a staff that is more in communion with each other than we are now”</td>
</tr>
<tr>
<td>REFLECTION</td>
<td>Pastor</td>
<td>Principal</td>
<td>Asst. Principal</td>
<td>Associate Pastor</td>
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<td></td>
</tr>
<tr>
<td>What is exhausting you... depleting your spirit?</td>
<td>Inability to let go; staff &amp; bd. members</td>
<td>When I hear or see someone being negative</td>
<td>Interaction with other staff; when leader is not at staff meeting we become accusatory, absent, withdrawal (See issues above)</td>
<td>My prayer life is stronger since I came to St. Mike’s</td>
<td>Lack of respect for people in their ministry</td>
<td>Need a positive work experience here</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Argue over past</td>
<td>Faculty are beginning to heal &amp; come together</td>
<td></td>
<td>Mass: “doing what is essential”</td>
<td>Undercurrent of talking about people</td>
<td>They vs Us (priest &amp; rectory staff)</td>
<td></td>
</tr>
<tr>
<td>What brings rest and comfort for you?</td>
<td>Getting away: I take a day off</td>
<td>Family - They listen &amp; restore me</td>
<td>Satisfaction in work</td>
<td>Routine: prayer &amp; reflection</td>
<td>Physical activity with parishioners, St. Joe’s provides structure: priest can do what is needed</td>
<td>Wonderful people that I work with: Parents</td>
<td></td>
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<td></td>
<td>When I am inventive; engage people in dialogue &amp; have a good exchange of ideas</td>
<td>Children @ school “laid time”</td>
<td>Music</td>
<td>Family (sisters &amp; brothers)</td>
<td>People energize me: graciousness of the people</td>
<td>People energize me: gracefulness of the people</td>
<td></td>
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<td></td>
<td></td>
<td>Prayer is my lifeline. “Put everything at the foot of the cross”</td>
<td>Computer graphics</td>
<td></td>
<td></td>
<td>Florida in January</td>
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<tr>
<td>How is your strength renewed?</td>
<td>Personal friends</td>
<td>Interacting with others on staff at principal &amp; faculty</td>
<td>DMin Studies: cohort enriching</td>
<td>Colleagues</td>
<td>Reflect with colleagues</td>
<td>Friends</td>
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<td></td>
<td>Ignatian Retreat</td>
<td>Sharing new ideas</td>
<td>Time away from parish (condo)</td>
<td>Reading at night</td>
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<td>Ministry: I love my work</td>
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<td></td>
<td>Camaraderie with priests</td>
<td>Going to dinner</td>
<td></td>
<td>Barrage of &quot;mini-miracles&quot;</td>
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<tr>
<td>Tell me 3 things about St. [ ] Parish</td>
<td>1. Tradition of lay ministry</td>
<td>1. Wonderful spirit</td>
<td>1. Priests are important</td>
<td>1. People love the priests</td>
<td>1. A lot of energy</td>
<td>1. Lately are involved &amp; invested</td>
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<td></td>
<td>2. Talented, professional, hard working staff that creates wonderful things</td>
<td>2. “Good” pride</td>
<td>2. Liturgy with lay involvement is important</td>
<td>2. Very busy &amp; has strong spirituality</td>
<td>2.舱</td>
<td>2. BIG: 3000+ families</td>
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<td></td>
<td>3. Historically the “lead” parish</td>
<td>3. “Hand in hand” with school; school is heart of the parish</td>
<td>3. School brings another dimension to the parish</td>
<td>3. Big ship that lost its rudder needs a vision</td>
<td>3. Big ship that lost its rudder needs a vision</td>
<td>3. Good people work here &amp; good things are happening</td>
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</tbody>
</table>

**Director’s Comment for Milestone Report:**
Each team member has custody of their own information. Consultants read statements back to team member, seeks corrections or edits, and gives them written copy. Each person may hold the information or share it with the team in a follow-up team discernment meeting. This matrix serves the consultant who shares it only with direct supervisor, usually project Director. I am not aware that a matrix report was shared with a team.
Addendum D, [3 pages]
Criteria for Collaborative Pastoral Leadership Teams
Pastor and entire INSPIRE team commit to focus on:

1. INSPIRE values
   a. Collaborative pastoral excellence
   b. Personal and Team Learning
   c. Leadership development
   d. Sharing faith
   e. Sharing learning (with one another and INSPIRE)
   f. Parish Mission

2. Willingness to develop individual and team skills and competencies, including the following:* 
   
   **Empathy** – sensitivity to others’ feelings and perspectives, and taking an active interest in their life experiences. People with this competence
   1. Are attentive to emotional cues and engage in active listening
   2. Show sensitivity and ability to listen to others’ stories and perspectives
   3. Exercise pastoral care by responding with understanding to other people’s needs and feelings

   **Influence** – the ability to persuade by giving witness to the Gospel message. People with this competence
   1. Are skilled at bringing other people into mission
   2. Are able to set the context and help others see the larger picture
   3. Welcome and incorporate diverse thought and experience
   4. Are able to build consensus and support

   **Build Safe Space** – explicit team agreement to work toward “no blame” working and communication practice. People with this competence
   1. Are skilled at managing and confronting conflictive issues
   2. Exercise confidentiality, according to standards of conduct articulated and adopted by the team
   3. Are able to receive constructive critique
   4. Are able to address and assess episodes of failure as opportunities for learning and accountability
   5. Are able to sit with complex questions which do not have clear answers
   6. Value personal responsibility and work toward co-responsibility for exercising pastoral leadership
   7. Are willing to be accountable to the team and the parish

   **Developing Others** – the ability to call forth gifts in others and to sense others’ development needs and bolster their abilities. People with this competence
   1. Encourage the development of one another’s gift, believing that there are different gifts, but the same spirit
   2. Acknowledge & reward people’s strengths & accomplishments
   3. Identify people’s needs for further growth and offer useful feedback
   4. Guide performance of others while holding them accountable
5. Establish and maintain structures that support regular rotation of leaders in positional leadership roles
6. Value mentoring and supervision as tools for supporting growth of leadership in the community
7. Understand development with attention to four interrelated areas of growth: holistic integration; spiritual formation; theological and ecclesial understanding; ministerial competence.

**Conflict Management** – the ability to negotiate and resolve differences and disagreements. People with this competence
1. Handle difficult people & tense situations with diplomacy & tact
2. Spot potential conflict, bring disagreements into the open, and then help de-escalate
3. Foster critical thought
4. Are able to safely raise and address “elephants in the room,” suppressed issues and dynamics that impede collaboration
5. Encourage debate, discussion and dialogue
6. Orchestrate win-win solutions
7. Seek information and observations from the margins of the community

**Pastoral Leadership** – the ability to inspire and guide individuals and groups in a religious community. People with this competence
1. Intentionally focus on the future and the realization of community’s shared vision & mission
2. Collectively seek the Spirit’s guidance through study, prayer and reflection.
3. Desire to consistently invite the potential of the parish community to live into its mission
4. Assist personal appropriations of the community’s mission through discernment of call
5. Step forward to lead as needed, regardless of position
6. Lead by example
7. Feed the spiritual hungers of people
8. Intentionally develop praxis of theological reflection within the community
9. Cultivate pastoral imagination, integrating Catholic tradition and spirituality in order to respond to contemporary needs of persons, community, and society

**Change Catalyst** – the ability to initiate and manage change and transitions. People with this competence
1. Believe that the call to common mission demands ongoing and radical conversion from everyone
2. Recognize the need for change and identify barriers
3. Challenge the status quo
4. Invite and enlist participation
5. Transform themselves and model the change expected of others
6. Recognize and affirm people’s stories, feelings and experiences during times of transition

**Building Bonds** – the ability to nurture relationships. People with this competence
1. Are grounded in the essence of community as relational with God, with one another, and in mission to others
2. Seek out relationships that are mutually healthy and life-giving
3. Build rapport, resilient communication systems, and keep others in the loop
4. Foster and maintain relationships among co-ministers and staff
5. Balance a focus on task with attention to relationships
6. Create small group experiences that strengthen relationships
7. Gather people to ritually celebrate community life
Team Capabilities and Collaboration – the ability to create group synergy in pursuing collective goals. ("A non-collaborative church is a church of maintenance rather than a church of mission." [Loughlin Sofield, Collaboration, 2000, Ave Maria (Press). Persons with this competence

1. Believe that their common baptism and reliance on one another’s charisms make them co-responsible for parish mission and ministry.
2. Seek to draw all members into active, enthusiastic participation
3. Identify, value, and interlink various personal gifts
4. Often work independently but with a sense of the work’s contribution to common mission
5. Consider themselves mutually accountable for team goals and objectives
6. Build team leadership identity and share pastoral savoir faire
7. Protect the group and its reputation and share credit
8. Are skilled at sharing information, plans, and resources
9. Promote a friendly, cooperative climate
10. Spot and nurture opportunities for collaboration

Pastor and entire INSPIRE team commit to focus on:

3. Participation in broader INSPIRE community

4. Planning calendar and time commitments as necessary to attain personal and team goals

5. Willingness to be studied in order to promote understanding and uncover limitations of INSPIRE’s team development strategies, and in order to test INSPIRE’s assumptions about developing healthy and productive pastoral leadership teams

*Please Note* INSPIRE’s list of competencies is based on the work of Daniel Goleman and colleagues at the Emotional Intelligence Consortium. Find the original “Emotional Competence Framework” at the EIC website: http://www.eiconsortium.org/pdf/emotional_competence_framework.pdf

NEXT Page: Addendum E, Consultant Performances Draft, [3 pages]
<table>
<thead>
<tr>
<th>INSPIRE</th>
<th>CONSULTANT</th>
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<tbody>
<tr>
<td><strong>COLLABORATIVE PASTORAL EXCELLENCE</strong></td>
<td>The Consultant facilitates experiences, discussions, and reflections that grow team leadership. The Consultant will:</td>
</tr>
<tr>
<td>To assist Parish Teams in the creation of a sustainable, collaborative framework for Catholic pastoral leadership.</td>
<td>1. Establish a safe environment that supports the public and private sharing of life and ministry experiences.</td>
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<td>2. Assist identification of core issues, concerns, and opportunities for individuals and teams.</td>
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<td>3. Demonstrate respect and confidence in others while securing commitments to build trust and mutual support.</td>
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<td>4. Consistently demonstrate active listening skills.</td>
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<td>5. Assist awareness of pastor’s and delegated ministers’ responsibilities, authority, and accountability in a Catholic parish.</td>
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<td>6. Facilitate team’s development of decision-making, implementation, and co-accountability protocols</td>
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<td>7. Model and teach constructive approaches to identifying and managing problems.</td>
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<td>8. Identify significant veiled issues of team dynamics, and raise them to the team’s awareness at times and in settings that offer opportunities for successful engagement.</td>
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<td>9. Develop co-accountability for collaborative leadership behaviors, and gradually decrease reliance on consultant.</td>
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<td>10. Consistently promote the core values and competencies of Collaborative Pastoral Excellence: personal and team learning; faith sharing; pastoral excellence expressed as shared pastoral imagination and leadership; development of parish mission, vision, and values.</td>
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</table>

<p>| INTERPERSONAL COMPETENCE | The Consultant applies strong interpersonal skills to one on one conversations and to facilitating group activities. The Consultant will: |
| To model collaborative leadership concepts both subtle and overt for the Parish Teams. | 1. Establish positive working relationships based upon mutual respect, trust, and honesty. |
| | 2. Demonstrate respect for confidential information. |
| | 3. Display a strong sense of purpose, personal investment, empathy, and positive energy. |
| | 4. Promote a “level playing field” where feelings, opinions and beliefs are received with respect. |
| | 5. Champion safe-space meeting environments and develop co-accountability for maintaining security and building trust. |
| | 6. Assist development of emotional maturity through interviews and conversations that sort out persons’ feelings and responses to events that provoke emotional reactions. |
| | 7. Remain emotionally available and neutral when threatening issues are raised, and respond with honesty, personal transparency, and integrity. |
| | 8. Respond to confrontation with tact and diplomacy so that a moment of conflict becomes an opportunity for learning and setting out new rules of conduct. |
| | 9. Consistently demonstrate interpersonal qualities that encourage collaborative leadership, including active listening, asset based analysis and appreciative inquiry, clear oral communication, affirmation coupled with willingness to challenge and be challenged, theological reflection, and creative problem solving. |
| | 10. Arrange coaching and mentor relationships for yourself, including advisement and assessment services from director. |</p>
<table>
<thead>
<tr>
<th>CHANGE AGENT</th>
<th>PERSONAL AND TEAM LEARNING</th>
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<tbody>
<tr>
<td>TO INSPIRE, PROVOKE, AND NURTURE WORKING RELATIONSHIPS THAT GROW COLLABORATIVE PASTORAL LEADERSHIP AND PRAXIS.</td>
<td>To assist Pastoral Teams in engaging personal and group learning that develops self-confidence, leadership, pastoral competence, and enthusiasm for the ministerial work.</td>
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<tr>
<td>The Consultant acts as a catalyst and resource for change.</td>
<td>The Consultant provides structure for personal and team learning experiences.</td>
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<tr>
<td>The Consultant will:</td>
<td>The Consultant will:</td>
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<tr>
<td>1. Arrive prepared and ready to engage the group.</td>
<td>1. Assist design, implementation, and evaluation of personal and team learning plans.</td>
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<td>2. Act as facilitator, managing group process while seeking opportunities for sharing the leadership role.</td>
<td>2. Promote learning as a tool used by healthy adaptive organizations to manage change.</td>
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<td>3. Move seamlessly from teacher to coach or observer to participant, consistently demonstrating appreciation for the contributions and achievements of others.</td>
<td>3. Identify blocking and withdrawal dynamics, and judge when to raise them up as subjects for team learning.</td>
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<tr>
<td>4. Demonstrate personal savoir faire for the process, motivate by modeling, publicly affirm and debrief small and major steps forward.</td>
<td>4. Work to co-create safe environment that is supportive of discussion, conversation, and dialogue.</td>
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<td>5. Identify resistance behaviors and assist persons in understanding and responding forthrightly and gracefully.</td>
<td>5. Seek and assist identification of resource persons who can provide learning services, training, and study experiences.</td>
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<tr>
<td>6. Actively promote a good flow of ideas, usher the team through movements from avoidance to debate, debate to discussion, discussion to conversation, conversation to dialogue.</td>
<td>6. Identify and recommend resources for learning such as books for group study, diocesan programs, events, and conferences.</td>
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<td>7. Seek out and make available to team members persons who can serve as coaches, mentors, advisors, planning consultants, and trainers.</td>
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<td></td>
<td>8. Assist design of conventional and unconventional approaches to learning: in-services, days away from the parish, including activities of play and participation of spouses and families.</td>
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| **SHARED SPIRITUALITY** | The Consultant facilitates faith sharing by individuals and in a team setting. The Consultant will:  
1. Upon first engagement, begin modeling spiritual reflection, especially at times of discernment and commitment.  
2. Consistently provide spiritual grounding via the use of prayer, music, meditation and or other experiences.  
3. Promote practices that assure confidentiality in spiritual sharing activities.  
4. Ensure that mutual respect and honest engagement are understood as guiding principals for sharing faith.  
5. Identify and share resources in the diocese and local community such as retreat centers, diocesan programs, and credentialed spiritual directors.  
6. Assist team’s understanding and response to the Church’s call to communio. |
| **PARISH MISSION** | The Consultant facilitates conversations that connect personal and team learning to parish mission, vision, and values. The Consultant will:  
1. Help the team achieve actionable knowledge about the parish and its relationship to its community and to local and universal Church.  
2. Assist learning about parish history, demography, and mission in context of social, cultural, local community, and ecclesial identity.  
3. Apply learning about community needs and Church mission to assessments of parish mission, vision, and values.  
4. Cultivate conversations and assist planning for pastoral care and parish expression of stewardship and evangelization, and educational, worship, service and justice ministries. |
| **PERSONAL HISTORY** | The Consultant draws from personal experience in Church settings, in parish ministry and leadership. |
| **PERSONAL PROFICIENCIES** | 1. Expertise in organizational development, leadership studies, or organizational psychology  
2. Knowledge of Catholic theological tradition and ability to do theological reflection  
3. Ability to draw from personal prayer life and to share faith  
4. Interpersonal and relational capacity for one-on-one counseling and managing group dynamics  
5. Negotiation, conflict management, planning skills  
6. Organizational, management, analytical, and leadership skills |