NAVIGATING THE POLITICAL WATERS OF DIOCESAN CHANGE

2016 Mid-Atlantic Congress

Dennis Cheesebrow, Founder and Principal

An innovative collaboration to serve the Catholic Church between
NAVIGATING DIOCESAN CHANGE

A. Focusing on the Mission Delivery Point

B. Exploring the Basics of Systemic Change

C. Seeing Change Readiness versus Change Management
   • A Tool for Assessment of Change Readiness

D. Discussing Opportunities and Contradictions
MISSION DELIVERY POINT

Parishioner

Pastor

Staff
BASICS OF SYSTEMIC CHANGE

- Responsibilities of a Bishop and pastor differ
- Change is possible when relationships are strong, respectful, and collaborative
- Change is hard when relationships are weak, disrespectful, and isolated.
- The key local change leader is the pastor
- A role of those at the Mission Delivery Point is to responsibly resist all change ... and self/local interests trump diocesan interests
BASICS OF SYSTEMIC CHANGE

• Data and analysis
• Vision (narrative and numbers), hope, and prayer
• Sound process and consultation
• Transparency and accountability
• Change readiness capacities and skills
DATA AND ANALYSIS
DATA AND ANALYSIS
VISION, HOPE, AND PRAYER

“THE WHAT” of a Diocesan Guiding Change DRAFT

A. Healthy and vibrant diocese
   • Growing Catholicity across the diocese
   • Increasing clarity of Catholic identity and beliefs
   • Increasing enrollment in the Catholic Schools
   • Financial stability and growth
   • Increasing vocations to priesthood and diaconate
   • Ministry 2025 Diocesan Pastoral Plan with a 10 Year Comprehensive Financial Model
“THE WHAT” of a Diocesan Guiding Change DRAFT

B. Healthy and vibrant parishes and schools
   • Increasing registered households
   • > than 60 % of HH attending Sunday Liturgy
   • > than 70 % of HH engaging in all forms of stewardship
   • Robust and energized evangelization
   • Robust and vibrant parish ministry
   • Financial and facilities health and stability
   • 3 Year Parish Cluster Pastoral Plans within a 10 Year Comprehensive Financial Model
   • 5 Year Catholic School Strategic Plans within a 10 Year Comprehensive Financial Model
VISION, HOPE, AND PRAYER

“THE WHAT” of a Diocesan Guiding Change DRAFT

C. Healthy and vibrant priests and deacons

- Moderate to high level of match of sacramental and pastoral loading to priest strengths
- Average work week of 55 hours with delegation of management responsibilities
- Engaged in daily prayer, reflection, and spiritual health and development
- Annual professional growth in capacities and skills
The language and systems thinking of the Awareness to Action are based largely on the theory and written works of Barry Oshry, Ph.D. of Power+Systems, Inc. and Seeing Systems, Seeing System II, and the Organizational Workshop.
CHANGE READINESS

Unhealthy Conditions at the Corners

Zone of the 4 Ps Balance and Health

- Process
- Mission Delivery Relationship
- Performance
- People
- Purpose
### Role of the Integrators of Pastor, Parish Directors, School Principal, and Finance Council

<table>
<thead>
<tr>
<th>The Free Agency Zone</th>
<th>The Political Zone</th>
</tr>
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<tbody>
<tr>
<td><strong>High Preference for Laity Culture</strong></td>
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<td><strong>Low Preference for Ordained Culture</strong></td>
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<td>Pastors, principals and directors do not effectively and efficiently manage their core processes, ministries, programs and services with growth of activities with little alignment to Catholic teaching.</td>
<td>Open conflict and disagreement between councils, pastor, staff, and/or parishioners with local dissonance and noise a predictable and influencing factor.</td>
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<td>Individualism, confusion, groups and people vying for power and privileges in the local parish and school</td>
<td>Self-interests overrun roles, responsibilities and relationships.</td>
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<td>Experience of staff and parishioners of being left directionless, with little focus on mission, ministry, quality and performance.</td>
<td>Unity, performance and quality take back seat to the &quot;show&quot;.</td>
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<td>Catholic teaching with little substance or challenge.</td>
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<td>High levels of frustration with little focus on mission or ministry and little sense of communion.</td>
<td>Pastors and/or directors maximize &quot;telling&quot; and &quot;controlling&quot; and minimize excellence in staff and parishioner consultation.</td>
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<td>Growing financial instability and decreasing registered households, stewardship and/or enrollment.</td>
<td>Departments and Catholic school operate in hard silos with little communication, collaboration or innovation.</td>
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<td>Pastors and parish leaders recognize the legitimate need for balance between the ordained and the lay authorities, roles, responsibilities, cultures, and gifts. Differences are not treated as threats, and the local focus is the building of a vibrant Catholic parish and sacramental life, as well as Catholic education at the parish and/or local area.</td>
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**Resentment and Passive Aggression Zone**
## Role of the Integrators of Pastor, Parish Directors, School Principal, and Finance Council

### The Free Agency Zone
- **Director of Faith Formation**
  - High Preference for Laity Culture
  - Low Preference for Ordained Culture
  - Individualism, confusion, groups and people vying for power and privileges in the local parish and school
  - Experience of staff and parishioners of being left directionless, with little focus on mission, ministry, quality and performance
  - Catholic teaching with little substance or challenge
  - High levels of frustration with little focus on mission or ministry and little sense of communio
  - Growing financial instability and decreasing registered households, stewardship and / or enrollment

### The Political Zone
- **Parish Director**
  - High Preference for both Ordained and Laity Culture
  - Open conflict and disagreement between councils, pastor, staff, and /or parishioners with local dissonance and noise a predictable and influencing factor
  - Self-interests overrun roles, responsibilities and relationships
  - Unity, performance and quality takes back seat to the “show”
  - Pastors and/or directors maximize “telling” and “controlling” and minimize excellence in staff and parishioner consultation
  - Departments and Catholic school operate in hard silos with little communication, collaboration or innovation
  - Resources
  - Low Preference for Laity Culture
  - High Preference for Ordained Culture

### The Leaderless and Lifeless Zone
- **Pastor**
  - Low Preference for both Ordained and Laity Culture

### Balance Zone
- Pastors and parish leaders recognize the legitimate need for balance between the ordained and the lay authorities, roles, responsibilities, cultures, and gifts.
- Differences are not treated as threats, and the local focus is the building of a vibrant Catholic parish and sacramental life, as well as Catholic education at the parish and /or local area.

### Example
- **Director of Faith Formation**

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**TeamWorks International, Inc.**
** Awareness to Action™**
### Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

**Role of the Shapers of Office of the Bishop, Chancery and Key Consultants**

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<td>High Preference for both Top-Down and Bottom-Up</td>
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<td>Low Preference for Bottom-Up</td>
<td>Open conflict and disagreement between levels of the diocese with private and public dissonance, disclosures, and noise.</td>
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<td>High Preference for Bottom-Up</td>
<td>Self-interests overruns roles, responsibilities and relationships.</td>
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<td>Low Preference for Top-Down</td>
<td>Direction, performance and quality take back seat to the “show”</td>
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<td>Bishop and diocesan officials abdicate to employees, pastors, and large funders the important choices and transitions.</td>
<td>Bishop and diocesan officials maximize the use of their organizational, institutional and cultural authority and minimize consultation both internally and externally.</td>
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<td>Free agency at office and parish levels create confusion and misuse of resources, with examples of increasing fraud.</td>
<td>Private privilege, secrecy, and narrow ecclesiology is preferred over equity, transparency, accountability, and broad ecclesiology.</td>
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**Balance Zone**

Bishop, Cabinet, and Consultants recognize the legitimate need for balance between leading from the Top-Down with leading from the Bottom-Up.

- Partnership across those who operate with canonical and civic authorities in governance and management, is informed by, and balanced with, intentional and structured consultation from priests, deacons, parish leaders, consultants, resource partners, foundations and laity as appropriate on key governance and management planning, prioritization of resources, and decisions.
Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

Role of the Producers of Employees and Parishioner Volunteers

**The Free Agency Zone**

- **High Preference for Ownership**
  - Employees believe that voice and participation in meetings and process equates to Pastor and diocesan choice making.
- **Low Preference for Compliance**
  - Relationships, performance and accountability is framed in language of mistrust, over-managing, and not respecting.

**The Leaderless and Lifeless Zone**

- **Low Preference for both Ownership and Compliance**
  - Employees organize to do the minimally acceptable, and/or protect the status quo.
  - Improvement in quality and performance is not structured nor engaged, as personal time and interests are more important.

**The Political Zone**

- **High Preference for both Ownership and Compliance**
  - Open conflict and disagreement between groups of employees with local dissonance and noise a predictable and influencing factor on decisions.
  - Self-interests overrun roles, responsibilities and relationships.
  - Unity, performance and quality take back seat to the “show”

**Balance Zone**

- Employees and pastors recognize the legitimate need for balance between individuality, freedom, and privilege with parish and diocesan need for alignment, consistency and quality.

- Employees and pastors provide “voice” to their interests and needs to strengthen the parish, school, and diocesan governance and management choices.

**Resentment and Passive Aggression Zone**

- **Low Preference for Ownership**
  - Pastors utilize church teaching, diocesan policy and interpretation of canon law to limit engagement, dialogue and dissent.
  - Unity of staff and department voice and action are preferred over quality of ministry, programming, or services.

**The Authoritative and Arrogant Zone**

- **High Preference for Compliance**
  - Pastors, being accountable to the governing body of the Diocese, and in some cases outside bodies and legislators and regulatory authorities, utilize policies, procedures, and directives to ensure compliance to external and internal regulations and standards.
Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

Role of the Customers of Parishioners, Parents, and Families

**The Free Agency Zone**

High Preference for High Quality
Low Preference for Access to ministries and services

Parishioners and staff organize tightly around a few and cherished ministries and programs with assumptions of funding, usually using language in terms of social justice and faith.

Quality, performance and accountability is not a focus, and pushed against as “corporate” and not for “Church”

**The Political Zone**

High Preference for both Quality and Access to ministries and services

Open conflict and disagreement as parishioners and leaders grapple with the basic inability for high access and high quality at the same time, and “losers” and “winners” emerge in parish and school budget and choices.

Self-interests overrun roles, responsibilities and relationships.

Unity, performance and quality takes back seat to the “show”

**Balance Zone**

Parishioners and Catholic School parents recognize the legitimate need for balance between self-interest and parish / diocesan / Church interests.

Parishioners provide “voice” to their interests and needs to strengthen the parish and school governance and management choices.

**The Leaderless and Lifeless Zone**

Low Preference for both High Quality and Access to ministries and services

Parishioners and leaders are disengaged in both planning and excellence in consultation.

Staff and administrators protest and preserve the status quo

Councils and commissions’ focus is on minutiae, balancing the budget, the inconsequential and away from ministry, mission and communio

**Resentment and Passive Aggression Zone**

High Preference for Access to ministries and services

Parents operate out of strong self-interest for specialized programming and allocation of parish and school resources for their children’s needs, while parishioners and parents demand specialized ministries

Parish staff, Finance Council, and Pastoral Council members are pressured to align to such interests and move away from excellence in governance.

Low Preference for High Quality
Bridges’ Three Phases of Transition:
1. Endings
2. Neutral Zone
3. New Beginnings

Loss of identity
Loss of control
Loss of meaning
Loss of belonging
Loss of future

Temporary support and structure
Tap into creativity

New identity
Clearer vision
OPPORTUNITIES AND CONTRADICTIONS

Opportunities

- Systemic change through relationships and process versus compliance and power
- Data, analysis, vision, and consultation to balance self and local interests
- Diocesan time and resources in change readiness vs. change management
- Mission Delivery Point and pastor capacity development

Contradictions

- History and capacity for consultation is generally undeveloped in dioceses
- Bishop - Ordained relationships
- Low level of understanding of authority, decision making, and consultation
- Social and public media carries no accountability
REFLECTIONS AND FEEDBACK

• What words, images, practices caught your attention or interest?

• What questions of clarification do you have?

• What issues or opportunities have interest for you to discuss deeper?
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