LESSON 9 – ORGANIZATIONAL LEARNING[1]

The Intentional Interim Ministry (IIM) process is that intentional effort to create a learning environment and, in many cases, learning to learn again. The Intentional Interim Pastor (IIP) and the congregation enter into a covenant agreement to achieve five IIM Developmental tasks: 1) Coming to terms with history; 2) Discovering a new identity; 3) New leadership emerging/Shifts of power; 4) Reconnecting with denominational linkages; and 5) Commitment to new leadership and a new future. The IIM process sets the conditions for the collective congregation to be engaged in organizational learning and to promote the sharing of knowledge which may be embedded in pockets of the congregation or in record books. The IIM process assists individuals in synthesizing their views and understanding events that have occurred in their history. As Chris Argyris and Donald A. Schon Argyris and Schon note about organizational learning, "There is a continual, more or less concerted meshing of individuals' images of their activity in the context of their collective interactions."[2]

Whenever a major event occurs in the life of the church (the departure or death of a beloved pastor, or church worker misconduct) there are simultaneous learning moments. The system is unfrozen, willing to unlearn and learn, seeking guidance and even being willing to innovate due to their desire to perpetuate their mission and accomplish their goals.

PART 1 – THEOLOGICAL BASIS FOR ORGANIZATIONAL LEARNING

The theme of learning and knowledge is prevalent throughout the Bible, mostly in relation to our knowledge of God, but also to knowledge generally. Knowledge stewardship is a life-long process. King Solomon writes in Proverbs 1, "Let the wise listen and add to their learning and let the discerning get guidance" (Proverbs 1:5, NIV). Interestingly, Solomon personifies wisdom and knowledge as if "they" want to be found.

Adam was originally made in God's image and God "put him into the garden of Eden to dress it and to keep it" (Genesis 1:26; 2:15). At that point, Adam had perfect knowledge of God and, it seems, he also had the requisite knowledge to be steward of creation. David R. Schwandt and Michael J. Marquardt acknowledge the peculiar role humans have in relation to other creatures to learn. They assert, "Our associated responsibility as human beings [is] to continuously contribute to knowledge creation through this learning process." Schwandt and Marquardt describe this role as being 'peculiar,' almost acknowledging an extraordinary treatment of humans in relation to the rest of creation.

Satan promised Adam and Eve they shall have "knowledge," promising, "…you will be like God, knowing good and evil" (Genesis 3:5). Some theologians hold, "the Fall was a fall up and not down."[3] But Pieper asserts, "While natural man, after the Fall, still retains a certain

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[1] According to Convert Words to Minutes - Speech Calculator (Free) (speechinminutes.com) this document should take 26.5 minutes for the average reader (130 wpm).
[2] (Argyris and Schön 1978), 15.
[3] (Pieper, Francis 1950), 544.

amount of intelligence in natural things, he is utterly incapable of understanding spiritual matters, the things that have to do with obtaining of God's grace and salvation. In his natural condition, man regards the Gospel, his only salvation after the Fall, as foolishness…".[4] Luther says after the Fall, "Adam is totally changed and has become quite another man."[5] Pieper says, "The intelligence of Adam has suffered an eclipse."[6]

Adam and Eve originally knew how to care for the creation; but, after the Fall, certain knowledge was gained (learned) and certain knowledge was lost (unlearned). The responsibility to "rule" over creation remained, but the resources (including knowledge) to do so were limited. Now man must relearn how to take care of a Fallen creation, with limited resources, and to exhort the God of all knowledge.

Congregations face the burden of limited resources (emotional, physically, spiritually, etc.) when they lose their pastor. The Intentional Interim Ministry (IIM) acknowledges this challenge and comes alongside the congregation during that loss to aid in resourcing. The goal of the IIM is not to relieve or remove the responsibility that belongs to the congregation, but to be a resource to the congregation in doing their work. The IIM Agreement states: "The only persons who can make fundamental change in a system are the people involved in the emotional process themselves. Although the Intentional Interim Pastor has adaptive leadership skills, tools, and techniques to encourage it, the change that needs to happen comes by God's grace to the Congregation from the inside out – not from the outside in."

To be proper stewards of God's Word and world requires a change of heart and mind toward God, or *metanoia*. The Greek term is often described in theological terms as repentance, or a change of mind. Senge links the origin of the word to learning. He observes, "To grasp the meaning of 'metanoia' is to grasp the deeper meaning of 'learning,' for learning also involves a fundamental shift or movement of mind."[7]   He explains, "Through learning we reperceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the generative process of life."[8] He concludes, "This, then, is the basic meaning of a 'learning organization' – an organization that is continually expanding its capacity to create its future."[9]

This occurs using deliverables (e.g., reports) by the Transition Task Force (TTF) team and the Intentional Interim Pastor. These deliverables are socialized throughout the congregation and the district, giving opportunity for congregational reflection and continual learning. Deliverables include recommendations for action, which further the congregation's taking responsibility in their corner of God's creation – experiential learning.

PART 2 – ORGANIZATIONAL LEARNING THEORY

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[4] (Pieper, Francis 1950), 544.
[5] (Pieper, Francis 1950), 544.
[6] (Pieper, Francis 1950), 544.
[7] (Senge 1994), 13.
[8] (Senge 1994), 14.
[9] (Senge 1994), 14.

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Organizational theorists describe how, in a "knowledge economy,"[10] "learning is the new form of labor."[11] Schwandt and Marquardt say, "learning inside the organization must be equal to or greater than change outside the organization or the organization will not survive."[12]

Argyris and Schon tackle the basic question: "What is an organization that it may be able to learn?"[13] They answer this question by treating an organization as a personal, rather than impersonal, entity.[14] But the personal organization is made up of individuals. [15] Just because individuals might learn something does not mean the organization has learned something: "In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do."[16] In contrast, as in the case of the social media companies, Google, Amazon, the military and the phone company, "there are situations in which an organization seems to know far more than its individual members" due to "structures, procedures, and memories built into the fabric of organizations…".[17]

Rather, Argyris and Schon maintained that organizations and individuals will "seek to protect themselves from the unpleasant experience of learning by establishing defensive routines."[18] Defensive routines are examples of homeostasis. Ronald Heifetz warns the organizational system is fierce and will attempt to assimilate, meaning aggressively absorb new members into the current state. Heifetz, Grashow, and Linksy explain why organizations often push forward without adapting to the changes around them. They assert, "Organizational systems take on a life of its own, selecting, rewarding, and absorbing members into it who then perpetuate the system."[19] Argyris and Schon describe that, in organizational learning, "There is a continual, more or less concerted meshing of individuals' images of their activity in the context of their collective interaction."[20] A visual road map can be useful to socialize the IIM process. A learning environment is fostered through visual aids, or object lessons.

On the next page is a visual map used to assist individual members, like the directories and maps in shopping malls, to know where the congregation is throughout the IIM journey. (See Appendix 1 for larger image.) The goal is to have the knowledge held explicitly and not with individuals, in their minds (tacit), but rather, "knowledge may also be held in an organization's files, which record its actions, decisions, regulations, and policies as well as in the maps, formal and informal, through which organizations make themselves understandable to themselves and

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[10] Knowledge-intensive activities, relying on informational, technological, and intellectual capabilities.
[11] (Schwandt and Marquardt 2000), 1.
[12] (Schwandt and Marquardt 2000)
[13] (Argyris and Schön 1978), 6.
[14] (Argyris and Schön 1978), 5.
[15] Jesus calls the collective church His body, His bride, and the mother of all believers. (Jeremiah 3:8; Ephesians 5:25 – 27; 2 Corinthians 11:2; Revelations 19:7 – 9)
[16] (Argyris and Schön 1978), 5.
[17] (Argyris and Schön 1978), 7.
[18] (Easterby-Smith and Lyles 2011), 11.
[19] (Heifetz, Grashow, and Linsky 2009), 50.
[20] (Argyris and Schön 1978), 15.

Branch Name	Duration	Start	End	Completion
PASTOR LEE'S REPORT as of 1/15/2021	261 days	12/18/2020	12/17/2021	0%
JOINING PHASE (Months 1 - 3)	50 days	2/1/2021	4/9/2021	0%
One-On-One Interviews / Congregational Systems Inventory (CSI)	43 days	2/1/2021	3/31/2021	0%
Staff Professional Development	50 days	2/15/2021	4/23/2021	0%
Form a Senior Leadership Team (SLT)	5 days	2/15/2021	2/19/2021	0%
All Ministry Team Meetings (Quarterly Team Huddles)	10 days	3/19/2021	3/31/2021	0%
Townhall Meeting #1 - Chafin-Schultz Inventory (CSI)	1 day	4/12/2021	4/12/2021	0%
IIM 1st Quarter Report	22 days	4/1/2021	4/30/2021	0%
LEARNING PHASE (Months 4 - 9) (SELF-STUDY)	6 mths	5/1/2021	10/15/2021	0%
Transition Task Force (TTF) Installation	0 days	5/23/2021	5/23/2021	0%
TTF Training	21 days	5/3/2021	5/31/2021	0%
TRAINING SESSION 1 - Systems Theory and Thinking	1 day	5/10/2021	5/10/2021	0%
TRAINING SESSION 2 - Focus Area: Mission, Vision and Alignment	1 day	5/13/2021	5/13/2021	0%
TRAINING SESSION 3 - Focus Area: Leadership	1 day	5/17/2021	5/17/2021	0%
TRAINING SESSION 4 - Focus Area: Theology and Practice	1 day	5/21/2021	5/21/2021	0%
TRAINING SESSION 5 - TTF Roles, Responsibilities and Timeline	1 day	5/24/2021	5/24/2021	0%
TEAMING WITH PSD DISTRICT	1 day?	6/7/2021	6/7/2021	0%
TTF COTTAGE MEETING SERIES	66 days	6/1/2021	8/31/2021	0%
JULY - TOPIC #1 TBD	22 days	6/1/2021	6/30/2021	0%
AUGUST - TOPIC #2 TBD	22 days	7/1/2021	7/30/2021	0%
SEPTEMBER - TOPIC #3 TBD	22 days	8/2/2021	8/31/2021	0%
TTF FINAL REPORT AND RECOMMENDATIONS	22 days	9/1/2021	9/30/2021	0%
TTF TOWNHALL #2 (Facilitated by Pastor Lee)	1 day	10/7/2021	10/7/2021	0%
IMPLEMENTATION PHASE (possibly Months 10 - 11)	2 mths	10/24/2021	12/17/2021	0%
Voter's Meeting	1 day	10/24/2021	10/25/2021	0%
Create An Accepted Implementation Plan	1 day?	10/25/2021	10/25/2021	0%
What belongs to Council?	1 day?	10/25/2021	10/25/2021	0%
What belongs to Staff?	1 day?	10/25/2021	10/25/2021	0%
What is shared?	1 day?	10/25/2021	10/25/2021	0%
Launch Project improvement Teams	0 days	10/25/2021	10/25/2021	0%
Analyze the implementation setting, that is, the climate for change.	0 days	10/25/2021	10/25/2021	0%
Decide how to organize the implementation effort.	0 days	10/25/2021	10/25/2021	0%
Develop an implementation plan covering activities, responsibilities, deadlines, and so on, and have it accepted.	0 days	10/25/2021	10/25/2021	0%
Communicate with and create ownership of changes by those affected by them and by those who will implement them.	0 days	10/25/2021	10/25/2021	0%
Implement the ministry solution.	0 days	10/25/2021	10/25/2021	0%
DEPARTURE PHASE (Month 12)	6 wks	12/18/2020	1/28/2021	0%
Assess the Ministry Effects	25 days	12/18/2020	1/21/2021	0%
Senior Pastor Departure	25 days	12/18/2020	1/21/2021	0%
Review Congregational Vote	25 days	12/18/2020	1/21/2021	0%
Ministry Safeguards	25 days	12/18/2020	1/21/2021	0%
Senior Leadership Team (SLT) Succession Plan	25 days	12/18/2020	1/21/2021	0%
Behavioral Covenants (2 - Congregation and Kansas District)	25 days	12/18/2020	1/21/2021	0%
Shepherding Flocks Ministry (Board of Elders)	25 days	12/18/2020	1/21/2021	0%
Review Assign Approved Recommendations to BOD or Staff	25 days	12/18/2020	1/21/2021	0%
Call Readiness Report and Close	21 days	12/18/2020	1/17/2021	0%

Figure 1 - Visual Mapping "IIM Process Map"

others."[21] Such knowledge becomes "embedded." The well-known engineer, statistician, and professor, W. Edwards Deming, famously said, "If you can't describe what you are doing as a process, you don't know what you are doing."[22]

David A. Kolb's experiential learning theory influenced scholar Peter Senge, who evolved another cognitive theory of organizational learning that prominently identified *mental models* – deeply ingrained assumptions, generalizations, or pictures and images that influence how we understand the world and how we act[23] – as a crucial component. Peter Senge identifies another four components required for learning at the individual, team, and organization level are *personal mastery, building shared vision, team learning, and systems thinking*.[24]

Highlighting two types of learning, Carol C. Leavitt notes, "One of the important principles of Senge's work is the differentiation between **adaptive** and **generative** learning. He characterizes adaptive learning as focusing on the foundation of existing knowledge, and amending that with new thinking, to accomplish an objective. This kind of learning is particularly salient to organizations seeking continuous improvement. For example, understanding the gaps between one's own firm's productivity, quality, costs, or market agility, and that of the competition, enables the generation of additional ideas by which to close those gaps."[25]

Leavitt observes, generative learning is necessary to explore new thinking, noting in her report, "By contrast, when new strategies, product lines, resources, or other assets are urgently needed, a different kind of learning is required to produce radical innovative ideas and discontinuous change – which is the nature of generative learning (Harrison, 2000). This was validated soon afterward by scholar James March (1991), who expanded on this theory to identify two modes of organizational learning: 1) **exploitation**, or the use of existing knowledge and resources to gain value from what is already known; and 2) **exploration** or thinking in

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[21] (Argyris and Schön 1978), 9.
[22] W. Edwards Deming - PDCA - Quality Management - Strategies for Influence.
[23] (Leavitt, Carol C. 2011), 7 – 8.
[24] (Senge 1994).
[25] (Leavitt, Carol C. 2011), 8.

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previously unused or unforeseen ways (i.e., seeking new options, experimenting, and conducting research) (p. 72).”[26]

Leavitt warns, “Too much exploration of new knowledge (generative learning) leaves the organization wishing for returns on its investments, while too much exploitation of existing knowledge (adaptive learning) may result in it becoming outdated and useless. The challenge here is to create the appropriate balance – even though it may be a moving target – between the need to develop new knowledge versus leverage existing knowledge.”[27]

PART 3 – TEN IIP TOOLS TO FASHION A LEARNING ENVIRONMENT

1. Personal Mastery (Peter Senge)

What some organizational theorists refer to as “execution with excellence” Senge calls “personal mastery”. Senge observes, “Organizations learn only through individuals who learn.”[28] At bottom Senge describes *personal mastery* as a discipline encompassing two activities: “first, is continually clarifying what is important to us” and “The second is continually learning how to see current reality more clearly.”

2. Mental Models (Peter Senge)

What Senge believes it is our mental models that are keeping “many of the best ideas”[29] from emerging. He concludes, “That is why the discipline of managing mental models – surfacing, testing, and improving our internal pictures of how the world works – promises to be a major breakthrough for building learning organizations.”[30]

3. Shared Vision (Peter Senge)

Senge describes, “A vision is truly shared when you and I have a similar picture and are committed to one another having it, not just to each of us, individually, having it. When people have a shared vision, they are connected”[31]. He continues, “Shared vision is vital for the learning organization because it provides the focus and energy for learning…visions are exhilarating…shared visions compel courage…shared vision fosters risk taking and experimentation.”[32]

4. Team Learning – Alignment (Peter Senge)

Senge tells Bill Russell’s story of how a team of specialists aligned the Boston Celtics basketball team’s collective skills to perform at the highest levels, winning eleven national championships in thirteen years. Senge describes “Russell’s Celtics demonstrate a phenomenon

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[26] (Leavitt, Carol C. 2011), 8.
[27] (Leavitt, Carol C. 2011), 10 – 11.
[28] (Senge 1994), 139.
[29] (Senge 1994), 174.
[30] (Senge 1994), 174.
[31] (Senge 1994), 206.
[32] (Senge 1994), 207 – 209.

we have come to call *'alignment,'* when a group of people function as a whole."[33] He notes, "In most teams, the energies of individual members work at cross purposes."[34] He notes, "Individuals may work extraordinarily hard, but their efforts do not efficiently translate to team effort."[35] Failure of an organization to learn is related to the degree views differ among individual members of the organization.[36] Argyris and Schon warn that as long as "stories remained scattered and uninterpreted, the map of the development process remained vague, and the diagnoses of the development problem remained ambiguous."[37]

Over time, ministries may drift in core mission alignment. Hence, at any given time, some ministries are more aligned than others in Gospel impact. Most (or all) current ministries have some level of impact on individual participants, but there is room for discussion about whether these ministries are ever increasing (Eph 4:12-13) in alignment with the congregation's core mission to promote the Gospel of Jesus Christ. Without aligning resources around a common vision or Gospel purpose, many ministries may be birthed (some at cross purposes) and resources become stretched. In ministry, the pastor, principal, and lay-leaders may all be quite gifted, but may work out of alignment with one another. Through alignment, a team becomes focused, "individuals' energies harmonize," and "there is less wasted energy."[38] These results from a "commonality of purpose, a shared vision, and understanding of how to complement one another's efforts."[39] In a congregation, and Church body, the many members have complementary roles as part of the one body of Christ and a commonality of purpose toward the shared *Missio Dei*.[40]

Dr. Karl Albrecht's executive white paper entitled *Organizational Intelligence & Knowledge Management: Thinking Outside the Silos,*[41]**Alignment and Congruence.** Any group of more than a dozen people will start bumping into one another without a set of rules to operate by. In an intelligent organization, its designers and leaders have eliminated most of the structural contradictions down to the core value proposition so that all the systems and individual energies are aligned toward the strategic vision.

5. The Principle of Leverage (Peter Senge)

Senge argues for "leverage" as a strategic use of resources. He asserts, "The bottom line of systems thinking is leverage – seeing where actions and changes in structures can lead to significant, enduring improvements."[42] The leverage occurs when 'significant' and 'enduring improvements' are achieved. Senge further maintains, "the best results come not from large-scale efforts but from small well-focused actions."[43] Too much effort is given to those matters

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[33] (Senge 1994), 234.
[34] (Senge 1994), 234.
[35] (Senge 1994), 234.
[36] (Senge 1994), 234.
[37] (Argyris and Schön 1978), 67.
[38] (Senge 1994), 234.
[39] (Senge 1994), 234.
[40] 1 Corinthians 12:12.
[41] Albrecht, Karl, "Organizational Intelligence & Knowledge Management: Thinking Outside the Silos", (http://www.karlalbrecht.com).
[42] (Senge 1994), 114.
[43] (Senge 1994), 114.

which are of little significance in the grand scheme of things and consequently "we create our own market limits."[44] The organization's inclination is to focus on "low-leverage changes…on symptoms where the stress is greatest."[45] "As a systems thinker," Senge advises, "you would first identify that key problem symptom, and then the symptomatic and fundamental responses to it."[46] Ministry programs, of course, do not exist in isolation. One element of impact is leverage, the degree to which a ministry program increases the impact of other ministry programs.

6. Community Building – Teaming (Roloff, Woolley, and Edmondson)

Roloff, Woolley, and Edmondson observe, "To accommodate the demands for higher productivity and faster learning, organizations have increasingly turned to using smaller and more flexible work units, such as teams, to accomplish their most important tasks."[47]

The authors recommended workplace structures have evolved from "hierarchical structures, to team-based work in matrix structures, and ultimately to team-based work in multi-team systems."[48] They discovered that, "As more teams share members, there is increased resource interdependence among different units of the organization."[49] The advantage of such team plays and collaboration is the creation of "more paths" for information to flow and come together, avoiding information getting stuck in the organizational system. Team play almost forces the various parts of the whole into an inter-dependence, or reliance, on one another, thus promoting knowledge throughout the whole. Roloff, Woolley, and Edmondson agree, saying, "Through multiple team membership, team learning can cross-fertilize across teams, building organizational learning."[50] Knowledge of God has been utilized, shared, and stored through intergenerational family groups and across cultures in largely the same manner.

7. Team Learning – Dialogue (Peter Senge, Easterby-Smith, and Lyles, Bohm)

Easterby-Smith and Lyles further describe "Dewey's view that learning takes place through social interaction and yet cannot be passed from person to person as if it were a physical object."[51] Organizational learning occurs when there is a casual and persistent exchange of ideas.[52] Church and school ministry teams can cultivate learning simply through increased dialogue. Encouraging ministry leaders to meet regularly, attend the IIM cottage meetings, townhalls, and to attend Bible study provides opportunity for ministry teams to dialogue and encourage one another in their faith and knowledge of God's Word. Peter Senge notes the observations of the famous Physicist Werner Heisenberg. "Heisenberg then recalls a lifetime of conversations with Pauli, Einstein, Bohr, and the other great figures who uprooted and reshaped traditional physics in the first half of the century," he writes. "These conversations, which

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[44] (Senge 1994), 115.
[45] (Senge 1994), 115.
[46] (Senge 1994), 120.
[47] (Roloff, Woolley, and Edmondson 2015)
[48] (Roloff, Woolley, and Edmondson 2015)
[49] (Roloff, Woolley, and Edmondson 2015)
[50] (Roloff, Woolley, and Edmondson 2015), 249.
[51] (Easterby-Smith and Lyles 2011), 9.
[52] (Easterby-Smith and Lyles 2011), 9.

Heisenberg says, 'had a lasting effect on my thinking,' literally gave birth to many of the theories for which these men eventually became famous."[53]

Senge marvels at "the staggering potential of collaborative learning – that collectively, we can be more insightful, more intelligent than we can possibly be individually." Heisenberg's contemporary, David Bohm, holds, "dialogue becomes open to the flow of a larger intelligence."[54] Senge suggests, "Dialogue, it turns out, is a very old idea revered by the ancient Greeks"[55] and the church may think of Job and his three friends. Some may view the dialogue between Job and his three friends as an example of the group's ignorance and not their collective wisdom.[56] But "the purpose of dialogue," Bohm explains, "is to reveal the incoherence in our thought."[57] Senge asserts, "In dialogue people become observers of their own thinking."[58] Bohm says that "Most thought is collective in origin. Each individual does something with it," but it originates collectively by and large. "Language, for example, is entirely collective," says Bohm.[59] Bohm identifies three basic conditions that are necessary for dialogue:

1. All participants must 'suspend' their assumptions, literally to hold them 'as if suspended before us'.
2. All participants must regard one another as colleagues.
3. There must be a 'facilitator' who 'holds the context' of dialogue.[60]

8. Be Aware of Organizational Learning Disabilities (Karl Albrecht)

To solve some organizational learning disabilities, like the Silo Syndrome, Albrecht has identified at least four strategies executives and leaders can use to make their organization smarter and achieve its mission in a changing environment: "Indeed, these four key enablers … can provide the means for moving the organization steadily toward ever higher levels of collective intelligence."[18]

➢ **Thought Leaders.**[19] These are the people willing to reach intellectually beyond the organization's norm. He notes, "Their breadth of view, conceptual skills, and ability to see through the fog of argument and discern the few really key variables and priorities in situations makes them unusually effective in whatever jobs they are assigned."

➢ **Communities of Interest**.[20] He notes, the combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.

➢ **Ad-hocracies.**[21] Sometimes a difficult or intractable organizational issue requires a special "hit squad" to solve it. While many organizations use ad-hocracies – specialized and transitory teams, task forces, committees, or advocacy groups assembled to

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[53] (Senge 1994), 238 – 39.
[54] (Senge 1994), 239.
[55] (Senge 1994), 239.
[56] The book of Job provides detail of the dialogue, which (remarkably) includes God and readers in this timeless conversation.
[57] (Senge 1994), 240.
[58] (Senge 1994), 242.
[59] (Senge 1994), 242.
[60] (Senge 1994), 243.

attack an objective. Ad-hocracies tend to be most effective when they are few, small, well-focused, led by competent thought leaders, and politically powerful.

➢ **Knowledge Platforms.**[22] These days, every organization of significant size or complexity needs a sophisticated and continuously evolving IT infrastructure to support the process of knowledge deployment.

9. Framing (Amy Edmondson)

Edmondson notes, "thoughtfully framing the roles that different people should play in a joint effort is important to building a cohesive team and an effective process."[61] Framing is not complete without justifying the project's purpose. Edmondson charges, "The leader's job is to articulate and help people cohere around this shared purpose."[62] She observes two types of purposes: aspirational and defensive. Framing includes such things as leaders choosing their own team members. She encourages, "Leaders must explicitly convey their own sense of interdependence with others for a successful outcome, express their own fallibility, and communicate a need for collaboration."[63] For this to occur, "Leaders must frame their role in the project in ways that invite others to participate fully."[64] Framing begins in the first interview with the congregation. Being able to describe the purpose and process of the IIM, the IIP's role, and the congregation's role is key. Framing continues throughout the journey and particularly in the formation of the Transition Task Force (or Transition Team) and the congregational self-study. Through framing the IIP is able to "hold" and promote a learning environment.

10. Organizational Forgetting: Intentional/Unintentional (De Holan and Phillips)

Many churches cannot fathom the idea of intentionally forgetting. However, it is part of receiving a new pastor. The congregation will need to be open to forgetting, or unlearning, past behaviors to create room for new "knowledge" or behaviors with the new pastor. De Holan and Phillips observe, "In some situations organizations may need to get rid of existing knowledge rather than develop new knowledge; in other words, to forget rather than to learn."

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[61] (Edmondson 2012), 96.
[62] (Edmondson 2012), 100.
[63] (Edmondson 2012), 96.
[64] (Edmondson 2012), 96.

PART 4 – QUESTIONS[65]

INSTRUCTIONS: ON A SEPARATE SHEET OF PAPER PLEASE COMPLETE THE FOLLOWING QUESTIONS.

INDIVIDUAL (PRIOR TO CLASS)

1. FROM YOUR EXPERIENCE, WHAT ARE TWO OR THREE OF THE BIGGEST CHALLENGES YOU HAVE FACED IN TEAM MINISTRY WITH OTHER CHURCHWORKERS OR LAY LEADERS?
2. WHEN DID YOU OBSERVE ANY OF THE TEN IIP TOOLS TO FASHION A LEARNING ENVIROMENT BEING USED IN MINISTRY?
3. LIST SOME EXAMPLES IN THE BIBLE OF GREAT TEAMS?
4. WHAT ARE SOME ATTRIBUTES THAT MAKE FOR GREAT TEAMS?
5. WHAT WAS THE BEST TEAM YOU HAVE EVER BEEN PART OF? WHY?

GROUP BREAKOUTS (30 MINUTES) AND PLENARY DISCUSSION (30 MINUTES)

1. **GROUP 1** – TAKE TURNS TO DESCRIBE HOW A TROUBLED TEAM YOU OBSERVED, OR LEARNED ABOUT, CAME BACK FROM THE BRINK OF DISASTER TO BEING MORE COHESIVE AND ALIGNED IN PURPOSE. WHAT WAS THE KEY TO THE TURNAROUND?
2. **GROUP 2** – WHAT TYPE OF LEARNING DOES THE CHURCH LEAN MORE TOWARDS, ADAPTIVE OR GENERATIVE? HOW SO OR WHY? LIST SOME EXAMPLES. WHAT DO THESE EXAMPLES ALL HAVE IN COMMON?
3. **GROUP 3** – WHAT ARE SOME DEFENSIVE ROUTINES HOLDING CONGREGATIONS BACK FROM COLLECTIVE LEARNING? WHAT ARE THE MOST COMMON? HOW CAN YOU HELP CONGREGATIONS SEE THIS BEHAVIOR?
4. **GROUP 4** – WHAT CAN AN INTENTIONAL INTERIM PASTOR DO TO HELP "GREASE" THE LEARNING WHEELS? THAT IS WHAT CAN THE IIP DO DURING THE INTERVIEW PROCESS, JOINING PHASE, SELF-STUDY, AND DEPARTURE? BE SPECIFIC AND INCLUDE ALL THOSE YOU WOULD RECRUIT TO HELP AND HOW?

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[65] Allowing six minutes per question the individual questions should take roughly 30 minutes.

Prepared by Martin Lee

APPENDIX 1

Branch Name	Duration	Start	End	Completion	
PASTOR LEE'S REPORT as of 1/15/2021	261 days	12/18/2020	12/17/2021	0%	
· JOINING PHASE (Months 1 - 3)	50 days	2/1/2021	4/9/2021	0%	⊙
One-On-One Interviews / Congregational Systems Inventory (CSI)	43 days	2/1/2021	3/31/2021	0%	⊙
· Staff Professional Development	50 days	2/15/2021	4/23/2021	0%	⊙
Form a Senior Leadership Team (SLT)	5 days	2/15/2021	2/19/2021	0%	⊙
All Ministry Team Meetings (Quarterly Team Huddles)	10 days	3/18/2021	3/31/2021	0%	⊙
Townhall Meeting #1 - Chafin-Schultz Inventory (CSI)	1 day	4/12/2021	4/12/2021	0%	⊙
IIM 1st Quarter Report	22 days	4/1/2021	4/30/2021	0%	⊙✔
· LEARNING PHASE (Months 4 - 9) (SELF-STUDY)	6 mths	5/1/2021	10/15/2021	0%	⊙
Transition Task Force (TTF) Installation	0 days	5/23/2021	5/23/2021	0%	⊙
· TTF Training	21 days	5/3/2021	5/31/2021	0%	⊙✔
TRAINING SESSION 1 - Systems Theory and Thinking	1 day	5/10/2021	5/10/2021	0%	⊙
TRAINING SESSION 2 - Focus Area: Mission, Vision and Alignment	1 day	5/13/2021	5/13/2021	0%	⊙
TRAINING SESSION 3 - Focus Area: Leadership	1 day	5/17/2021	5/17/2021	0%	⊙
TRAINING SESSION 4 - Focus Area: Theology and Practice	1 day	5/21/2021	5/21/2021	0%	⊙
TRAINING SESSION 5 - TTF Roles, Responsibilities and Timeline	1 day	5/24/2021	5/24/2021	0%	⊙
TEAMING WITH PSD DISTRICT	1 day?	6/7/2021	6/7/2021	0%	⊙✔
· TTF COTTAGE MEETING SERIES	66 days	6/1/2021	8/31/2021	0%	⊙
JULY - TOPIC #1 TBD	22 days	6/1/2021	6/30/2021	0%	⊙
AUGUST - TOPIC #2 TBD	22 days	7/1/2021	7/30/2021	0%	⊙
SEPTEMBER - TOPIC #3 TBD	22 days	8/2/2021	8/31/2021	0%	⊙
TTF FINAL REPORT AND RECOMMENDATIONS	22 days	9/1/2021	9/30/2021	0%	⊙✔
TTF TOWNHALL #2 (Facilitated by Pastor Lee)	1 day	10/7/2021	10/7/2021	0%	⊙
· IMPLEMENTATION PHASE (possibly Months 10 - 11)	2 mths	10/24/2021	12/17/2021	0%	⊙
Voter's Meeting	1 day	10/24/2021	10/25/2021	0%	⊙
· Create An Accepted Implementation Plan	1 day?	10/25/2021	10/25/2021	0%	
What belongs to Council?	1 day?	10/25/2021	10/25/2021	0%	
What belongs to Staff?	1 day?	10/25/2021	10/25/2021	0%	
What is shared?	1 day?	10/25/2021	10/25/2021	0%	
· Launch Project Improvement Teams	0 days	10/25/2021	10/25/2021	0%	⊙
Analyze the implementation setting, that is, the climate for change.	0 days	10/25/2021	10/25/2021	0%	⊙
Decide how to organize the implementation effort.	0 days	10/25/2021	10/25/2021	0%	⊙
Develop an implementation plan covering activities, responsibilities, deadlines, and so on, and have it accepted.	0 days	10/25/2021	10/25/2021	0%	⊙
Communicate with and create ownership of changes by those affected by them and by those who will implement them.	0 days	10/25/2021	10/25/2021	0%	⊙
Implement the ministry solution.	0 days	10/25/2021	10/25/2021	0%	⊙
· DEPARTURE PHASE (Month 12)	6 wks	12/18/2020	1/28/2021	0%	⊙
· Assess the Ministry Effects	25 days	12/18/2020	1/21/2021	0%	⊙
Senior Pastor Departure	25 days	12/18/2020	1/21/2021	0%	⊙
Review Congregational Vote	25 days	12/18/2020	1/21/2021	0%	⊙
· Ministry Safeguards	25 days	12/18/2020	1/21/2021	0%	⊙✔
Senior Leadership Team (SLT) Succession Plan	25 days	12/18/2020	1/21/2021	0%	⊙
Behavioral Covenants (2 - Congregation and Kansas District)	25 days	12/18/2020	1/21/2021	0%	⊙
Shepherding Flocks Ministry (Board of Elders)	25 days	12/18/2020	1/21/2021	0%	⊙
Review Assign Approved Recommendations to BOD or Staff	25 days	12/18/2020	1/21/2021	0%	⊙
Call Readiness Report and Close	21 days	12/18/2020	1/17/2021	0%	☺

Prepared by Martin Lee

[While studies in Organizational Learning ("OL") have arguably been around for thousands of years, the authors below are significant modern-day trailblazers in the field. OL is a fascinating study as it touches most every industry and certainly every congregation with twelve or members (according to Dr. Karl Albrecht). The 1994 work of Peter Senge in the "The Fifth Discipline: The Art and Practice of the Learning Organization" is referred to as a "watershed" contribution, popularizing OL in the Academy and mainstream corporate America. Senge's work while building on the classic work of Chris Argyris and Donald Schon is also considered foundational. Ronald Heifetz and Amy Edmondson are both excellent in the applied sciences expanding on Senge's work in the areas of adaptive learning-leadership and teaming (teamwork).]

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