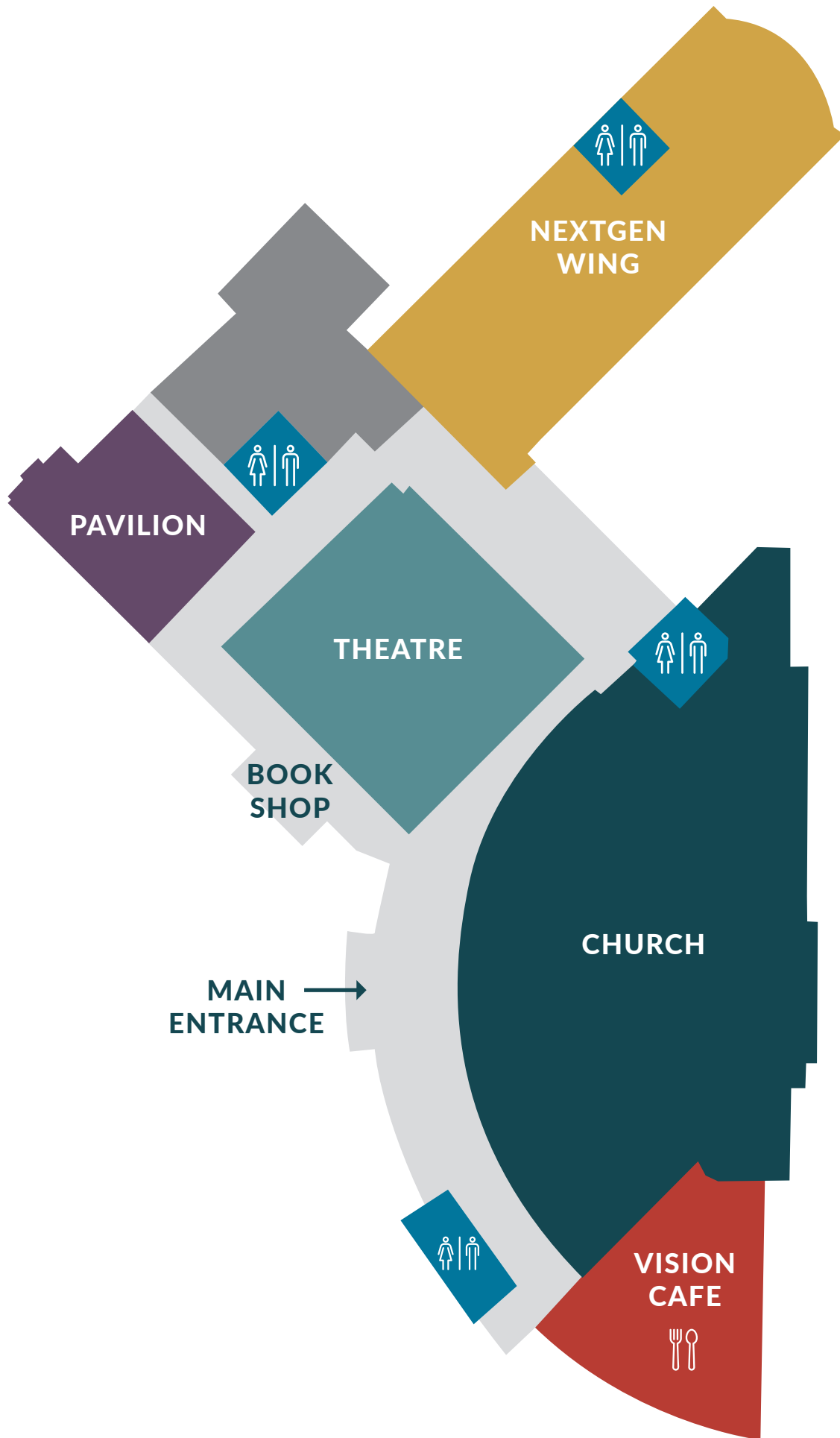


INSTITUTE FOR EVANGELIZATION



OCTOBER 25, 2023 • CHURCH OF THE NATIVITY





PAVILION

NEXTGEN
WING

THEATRE

BOOK
SHOP

CHURCH

MAIN ENTRANCE →

VISION
CAFE

Schedule

CHURCH OF THE NATIVITY | 9AM-3PM

Emcee Deacon Curtis Turner with Stacy Golden

9:00 am

Arrival, Refreshments and Registration

9:45 am

Welcome

10:15 am

Remarks

Archbishop William E. Lori

10:45 am

Keynote

Deacon Keith Strohm

11:30 am

Adoration

12:20 pm

Lunch

1:15-2:00 pm

Breakout 1

Deacon Keith Strohm Q+A (Theatre)

Healthy Conflict with Lisa Metcalfe (Church)

2:15-3:00 pm

Breakout 2

Deacon Keith Strohm Q+A (Theatre)

Effective Meetings with Lisa Metcalfe (Church)

3:00 pm

Closing Prayer

Bishop Adam Parker and Bishop Bruce Lewandowski

Presenters



KEYNOTE PRESENTER

DEACON KEITH STROHM

M3 Ministries

Deacon Keith Strohm is the former Director of the Office for the New Evangelization and a deacon for the Archdiocese of Chicago. A well-known international and conference keynote speaker, he has helped tens of thousands of men and women hear the Gospel message and encounter the mercy, love and power of Jesus Christ. Deacon Keith has extensive experience in creating and sustaining processes and programs of evangelization and formation at the group, parish and diocesan level that focus on the making, maturation and missioning of disciples of Jesus Christ. He is the Executive Director of M3 Ministries and a long-time teacher and collaborator with the Catherine of Siena Institute.



BREAKOUT PRESENTER

LISA METCALFE

Leadership Roundtable

Lisa Metcalfe serves as Director of Services and Programs for Leadership Roundtable, leading staff in delivering our comprehensive leadership development and consultancy services to Catholic organizations and dioceses across the United States. Before transitioning her career to work for the Church, Lisa was a senior leader at both corporate and nonprofit entities. She is an entrepreneur, having launched a national professional services firm with a team of colleagues with more than a decade of professional services and consulting experience. Prior to joining Leadership Roundtable, she served in the Archdiocese of Denver. She is certified by the Center for Creative Leadership to deliver the Catholic Leadership 360 assessment tool, is a certified Standards for Excellence Licensed Consultant, and serves as a faculty member for the Toolbox for Pastoral Management.



CO-EMCEE

DEACON CURTIS TURNER

St. Frances Academy

Deacon Curtis Turner is the Head of School at Saint Frances Academy in Baltimore City. He serves as the Development Co-Chair and Board Member of the Mother Lange Guild. He is a Non-resident Associate Member of the Oblate Sisters of Providence and a permanent deacon for the Roman Catholic Archdiocese of Washington. Deacon Turner has worked in secondary education for 30 years and holds a B.S. in Physics from Howard University and a Masters and Doctorate in Education from the University of Massachusetts at Amherst.



Archdiocese of Baltimore

Pastoral Staff Day

Healthy Conflict - Key Takeaways

October 25, 2023

Purpose

This workshop will explore essential conflict management skills and how conflict handled well can be creative and productive.

Learning Objectives

- Explore our own attitudes and behaviors towards conflict
- Appreciate why conflict management skills are essential for pastoral ministry
- Build the capacity to use conflict management skills as a tool for creative innovation

Key Takeaway 1: Why is this topic essential?

- We are human, and we all experience conflict regularly. We discuss conflict management because there is no such thing as conflict elimination.
- In pastoral ministry, conflicts often go unresolved because some believe people who care about one another or being a good Christian means avoiding conflict.
- More damage can occur from the dysfunctional strategies we use to deal with conflict, rather than the conflict itself. Avoidance and time do not heal all things.
- Conflict handled well can create connection and understanding. Innovation comes from creative conflict.

Key Takeaway 2: Impact of dysfunctional strategies

- Sometimes more damage occurs in conflict from dysfunctional strategies rather than the conflict itself.
- Some examples of dysfunctional strategies: avoidance, assume a position of superiority, devise new rules/procedures to avoid the issue, triangulation (drawing a third party into a conflict instead of directly addressing the other person).

Key Takeaway 3: Win-Win Results

Getting to Yes: Negotiating Agreement Without Giving In, by Fisher, Ury, and Patton, 2011

- **Four elements of principled negotiation:**
 - ◇ **Separate people from the problem.**
Focus on observable events or behaviors rather than the person's character. Once we label someone, we tend to be in conflict with the person, not the problem.
 - ◇ **Focus on interests, not positions.**
What I perceive to gain or lose is my "interest." Examples of interests are security, inclusion, achievement, control, recognition. My "position" on an issue is my attitude or opinion. If I take a strong position, I may not see other ways to satisfy my interest. In conflict, we both have interests. If we talk about our interests rather than positions, we can seek solutions that satisfy both of our interests.
 - ◇ **Generate options for mutual gain.**
In almost all conflicts, there usually are multiple ways of reaching an agreement where both parties have something to gain. Approaching a situation by offering a "yes" or "no" ultimatum doesn't work. Alternatively, you can ask the other person to help you generate multiple options, remembering that we have a shared mission.
 - ◇ **Insist on using objective criteria.**
The options that both parties generate should be based and measured on objective criteria.

Key Takeaway 4: Action Steps to Manage Conflict

The Art of Conflict Management: Achieving Solutions for Life, Work, and Beyond, Great Courses, Michael Dues, Ph.D., University of Arizona

- **Define the conflict issue.** Name the situation that is bothering you and identify why it is bothering you. The issue must be articulated by describing the other person's objective and observable behavior, not by your interpretation of the other person's intentions, emotions, attitudes, or character. In preparation, ask yourself these reflection questions:
 - ◇ *Why do I want to resolve this conflict?*
 - ◇ *How has this affected me?*
 - ◇ *What are my needs in this situation? (There are relatively few deep needs that motivate most behavior - security, acceptance, accomplishment, etc.)*
 - ◇ *What am I hoping for in this dialogue?*
 - ◇ *Am I seeking to understand their point of view? Or am I looking to persuade them?*
 - ◇ *If we seek understanding, what questions can we explore that will us better understand?*
 - ◇ *What do we have in common? To what values are we both committed?*
- **Decide.** You need to decide whether or not you want to resolve or avoid the issue. You might think that certain conflicts are not significant enough to address. You can use minor conflicts to practice conflict management skills. Practice with people you trust to provide you with psychological safety.
- **Arrange a meeting.** Contact the person you are in conflict with and request a meeting (preferably in person) to address the issue. Give the other person an equal say on when and where the meeting occurs.
- **Have the meeting.** Share your concern, focusing on how the situation has affected you. When you do this, this is how it affects me ... Express your interests and ask the person to express their interests. Seek to find common interests on which to focus. Suggest solutions, but do not be overly committed to your solutions. Give the person your full attention.
 - ◇ Paraphrase by restating what you heard the other person say without necessarily agreeing. "What I hear you saying is... is that correct?" ...
 - ◇ Instead of responding defensively, respond with curiosity. "This feels important to you. Why do you think it is important to our discussion today?" ...
 - ◇ Confirm your understanding by asking open-ended questions.
 - ◇ Acknowledge emotions that arise even if you do not agree or understand them.
 - ◇ If the statement is in the form of a complaint, ask them to reframe in the form of a hope or aspiration. "What is it that you would hope to see as an outcome of our conversation today?" ...
- **Agree.** The two of you agree about what each will do to solve the conflict. The agreement must be explicit and address actions (not attitudes) that can be observed by following through on the agreed-upon terms. Summarize the agreement and then check to ensure that the other party has the same understanding.
- Follow through on the agreement. You must do what you agreed to. If the other party also does what was agreed to, acknowledge and express appreciation for their behavior.

Recommended Resources

- [Redeeming Conflict: 12 Habits for Christian Leaders](#), by Ann Garrido, 2016
- [Difficult Conversations: How to Discuss What Matters Most](#), by Stone, Bruce, and Heen, 10th anniversary edition, 2010
- [Getting to Yes: Negotiating Agreement Without Giving In](#), by Fisher, Ury, and Patton, 3rd edition, 2011
- [The Art of Conflict Management: Achieving Solutions for Life, Work, and Beyond](#), The Great Courses, Michael Dues, Ph.D., University of Arizona
- [Together We Decide: An Essential Guide For Making Good Group Decisions](#), by Craig Freshley, 2022
- [Interpersonal Conflict](#), by Hocker, Berry, and Wilmot, 11th edition, 2021



Archdiocese of Baltimore

Pastoral Staff Day

Effective Meetings - Key Takeaways

October 25, 2023

Purpose

This workshop will demonstrate how effectively run meetings can provide the structure and direction needed to support our ministries.

Learning Objectives

- Identify characteristics of an effective meeting
- Understand the importance of meeting planning and preparation, particularly creating a thoughtful and structured agenda
- Learn effective virtual and in-person meeting facilitation skills, including engagement strategies to invite participation

Key Takeaway 1: Key planning questions when preparing to facilitate a meeting

- **Why meet? What is the purpose of the meeting?**
 - ◇ To solve a problem
 - ◇ To make a decision
 - ◇ To resolve a conflict
 - ◇ To launch a project
 - ◇ To engage in planning
 - ◇ To generate ideas
 - ◇ To share information
 - ◇ To create community
- **What kind of meeting is this?**
 - ◇ Daily Check-in
 - ◇ Weekly Staff Meeting
 - ◇ Specific Topic Meeting
 - ◇ Strategic Planning Meeting
- **Who should attend?**
 - ◇ Who should have a voice at the table?
 - ◇ What will each person contribute to the discussion?
 - ◇ Do the participants know each other?
 - ◇ When and where? Considerations for meeting location.
 - ◇ Do you need collaboration tools (i.e., whiteboards, flip charts)?
 - ◇ Will outside participants join a conference or Zoom call?
 - ◇ Will there be outside guests? Do you need signage to direct participants to the room?
 - ◇ Will you need space to break out into smaller groups?
 - ◇ Do you need to re-arrange the tables and chairs?
 - ◇ Will you provide food and beverages?
 - ◇ Will you provide materials?
 - ◇ Will the meeting be offsite?

- **What is the agenda? See sample agenda template below.**
 - ◇ Answer planning questions
 - ◇ Next important to create agenda
 - ◇ First, identify the goals of the meeting
 - ◇ Then develop the agenda topics
 - ◇ Be realistic about what can include
 - ◇ Send agenda to participants in advance

Key Takeaway 2: Role of the facilitator

- Values all voices
- Invested in the group achieving the desired outcomes
- Asks insightful questions
- Reflects back to the group what is happening
- Help the group see why different perspectives and opposing voices are critical to the outcome

Key Takeaway 3: Effective facilitation

- Create well-planned agenda
- Select person record the minutes (notes)
- Arrive early to be sure room is ready
- Start meeting on-time
- Welcome participants individually
- Summarize discussion, decisions made
- Confirm next steps and clearly assign follow up tasks

Key Takeaway 4: Engagement strategies to invite participation

- Journaling
- Passing technique offering an invitation to share but allows participants to decline
- Storytelling
- Breakout groups
- Reflect/pair/share - invite participants to reflect individually, then find a partner and share
- Role playing

Key Takeaway 5: How to facilitate productive brainstorming

- Ask someone to share an idea and pass
- Write a list of all ideas where all can see
- Keep going around until all ideas shared
- No judgment until all ideas shared

Key Takeaway 6: Effective facilitation strategies

- **How do we encourage introverts to participate?**
 - ◇ “_____, we’d be interested in your thoughts” ...
 - ◇ “Has everyone had a chance to share their thoughts with us today?” ...
- **How do we encourage extroverts to provide space for others to participate?**
 - ◇ “_____, thank you for your contribution. Your thoughts on _____ are helpful. I want to be sure we have the chance to hear from everyone today. Would someone else like to share?” ...
- **How to avoid getting off-track**
 - Topics raised not on the agenda**
 - ◇ “I appreciate this is something you think we should discuss but this isn’t the purpose of today’s meeting. I would be happy to put on a future agenda” ...
 - ◇ “Let’s you and I have a separate discussion on that topic, I’ll reach out to you after today’s meeting to schedule”

Exceeding time allocated for a topic

- ◇ “It is clear that we didn’t give this topic enough time ... we’ll add to next week’s agenda” ...
- ◇ “... we’ll schedule a separate meeting to discuss this specifically” ...

- **Importance of questions**

To encourage ideas

- ◇ *In your experience ...*
- ◇ *What else? ...*
- ◇ *What does someone else see? ...*

To clarify

- ◇ *Can you tell me more ...*

To confirm

- ◇ *It sounds like what you are saying is ..., is that right?*
- ◇ *Is the reason that is important because ...*

To create possibilities

- ◇ *How does this contribute to*
- ◇ *What might this mean if we are successful? ...*

To give voice to alternatives

- ◇ *Would someone like to speak to an option that is not being considered?*

Key Takeaway 7: Differences of opinion

- **Can be tempting to want to limit differences of opinion and opposing voices**
- **Can be a voice for something that is missing and needed in the conversation; often said with a great deal of courage**
- **If do not have opportunity to be heard now, will likely show up in other ways that can impact the team’s effectiveness**
- **Help participants explore the viewpoint through curiosity**
 - ◇ *“Who sees the issue the same way?” ... “Who sees it differently?” ...*
- **Managing confrontation**
 - Paraphrase to clarify assumptions behind the statement**
 - ◇ *“What I hear you saying is... is that correct?” ...*
 - Respond with curiosity**
 - ◇ *“This feels important to you. Why do you think it is important to our discussion today?” ...*
 - If the statement is in the form of a complaint, ask them to reframe in the form of a hope or aspiration**
 - ◇ *“What is it that you would hope to see as an outcome of today’s meeting?” ...*

Key Takeaway 8: Virtual meeting best practices

- If you are the facilitator, sign on 15 minutes before the meeting
- Open the call 5 minutes before the start time
- Lighting is important. Use the camera and position correctly.
- Find a quiet space without distractions.
- If in a quiet location and appropriate to the meeting, keep yourself unmuted so you can more easily engage in dialogue without the delay of muting and unmuting yourself.
- Be more energetic than you would be in-person
- Welcome each participant individually as they join the call
- Make sure names are shown
- Call on people – but let them know ahead of time; more likely to be engaged and focused
- Encourage use of chat to share
- Use the participation buttons
- Invite people to use “raise your hand” if like to share
- Keep list of who has spoken

- Consider individual breakout rooms for reflection
- Use breakout rooms for smaller group discussion
- Have someone serve in production role to assist with technical aspects

Key Takeaway 9: Following the meeting, review and reflect

- Were the goals of the meeting met?
- Was there a clear summary and actionable next steps?
- Did participants receive the agenda and other materials in time?
- Did everyone come prepared for the discussion?
- Were the needed people for the topic included?
- Did everyone have the chance to participate?
- Were participant's contributions met with respect?
- Did anyone dominate the discussion? If so, how was this handled?
- Did the meeting start and finish on time?
- Did the meeting location and set up work for the purpose?
- Was the next meeting scheduled?

Key Takeaway 10: Characteristics of an effective meeting

- Meeting was thoughtfully planned
- All participants received the agenda and materials with adequate time to prepare
- All participants attended the meeting prepared
- The people that needed to be in the meeting were included
- The meeting started and ended on time
- The meeting facilitator was skilled at keeping the meeting on track, focused on the agenda items, and ensuring everyone's voice was heard
- The meeting ended with clarity and commitment regarding the next steps

Agenda

Day and Time

Month Day, Year, Start Time - End Time, Time Zone

Location

Meeting Location or Virtual Meeting Link

Participants

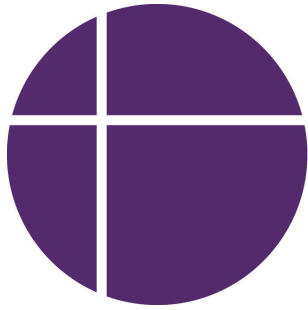
Name of all participants (suggest listing in alphabetical order)

Goals

1. Goal 1
2. Goal 2 ...

Agenda

1. **Opening Prayer:** (Name of Person Leading Prayer) - ___ minutes
2. **Check-in:** (all) - ___ minutes
 - a. Discussion Question
3. **Agenda Topic:** (Name of Presenter) - ___ minutes
 - a. Point A ... (Point B, Point C, etc. on next lines)
 - b.
4. **Agenda Topic:** (Name of Presenter) - ___ minutes
 - a. Point A ... (Point B, Point C, etc. on next lines)
 - b.
5. **Agenda Topic:** (Name of Presenter) - ___ minutes
 - a. Point A ... (Point B, Point C, etc. on next lines)
 - b.
6. **Meeting Summary, Assignments, Next Steps:** (Name of Meeting Facilitator) - ___ minutes
7. **Upcoming Meetings:** (Name of Meeting Facilitator) - ___ minutes
 - a. List of upcoming meetings including date/time/location
8. **Check-out:** (all) - ___ minutes
 - a. Question to solicit feedback / final comments from all participants
9. **Related Documents**
 - a. List any related documents that may be referenced in the meeting



LEADERSHIP ROUNDTABLE

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In partnership with lay, ordained, and religious leaders and organizations across all sectors of the Catholic community in the United States and Rome, Leadership Roundtable seeks to elevate and implement best practices in management and leadership to establish a culture of co-responsible, servant leadership for a healthy, thriving Church in the U.S.

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Avoidance to Accountability Overview

Excerpts from Chapter 8 of Ablaze: 5 Essential Paradigm Shifts For Parish Renewal

Although holiness is one of the Four Marks of the Church because of Her Divine origin, we must also understand that fallible, broken human beings are a part of the Church. When we gather together, our associations are colored by that brokenness. In many ways, human organizations are a lot like living organisms. Just like pathogens, bacteria, and bio-mechanical breakdowns can cause serious illness within living organisms, dysfunction, personality issues, broken relationships, and a host of other interpersonal issues can be the cause of sickness within organizations.

Including the Church.

PLAYING THE AVOIDANCE GAME

In a Paradigm of Avoidance, leaders avoid having difficult and forthright conversations about performance, focus, fruit, etc. because they want to be nice and don't want to hurt other people's feelings. This is a natural human response; most of us want to be liked and don't want to be a source of pain for others. Add to that the ministerial context of our interactions within a parish or diocese, where we have the desire and training to bring healing and to nurture others, and you have a recipe for avoidance. Let's face it, most pastors did not answer their call to priesthood because they wanted to handle interpersonal conflict or navigate organizational challenges—and we probably didn't sign up for that stuff either when we jumped in to volunteer or work at our parish. One pastor confided in me that he felt he was formed in seminary primarily to be a "chaplain," to care for the spiritual needs of his community. "But," he said to me one day, referring to a group of motivated parishioners who wanted to see the parish renewed, "they are trying to make me into a leader."

THRIVING IN ACCOUNTABILITY

In contrast to those in the Paradigm of Avoidance, leaders working out of a Paradigm of Accountability see the role of leadership at every level concerned with both the pastoral care of individuals and fruitful effectiveness. As a result, these leaders embrace difficult conversations and will confront reality in the life of the parish as an act of charity and service to the whole community. They build habits of what business leader and consultant Kim Scott calls radical candor, an approach to communication that combines the two dimensions of Caring Personally for others and demonstrating that through a willingness to Challenge Directly. This approach to radical candor is an embodiment of Paul's exhortation to "live [and speak] the truth in love." (Ephesians 4:15)

Elements of Living in a Paradigm of Avoidance

- Absence of "difficult conversations" about fruit, performance, or behavior because we don't want to hurt other people's feelings.
- Burying of disagreement or misalignment with strategic direction or proposals during meetings to "keep the peace"
- Presence of "800-pound Gorillas" that lurk over conversations and decisions
- Growing sense of frustration, poor morale, and dysfunction because issues are never addressed
- Won't press forward on a strategic direction or execute a solid vision because of the perceived difficulties of change or consequences for a person or group in the parish or diocese.

Elements of Living in a Paradigm of Accountability

- Leaders at every level see their role as concerned with both the pastoral care of individuals and fruitful effectiveness of mission.
- Embrace of Radical Candor as a primary mode of communication
- An understanding of conflict as a catalyst for positive change, growth, and transformation
- No tolerance for passive aggressiveness, "sacred cows," or resistance to direction
- Does not shy away from strategic decisions because they might make others upset.

Notes

Pastoral Staff Day 2023 would not have been possible without the contributions of many. Thank you to the Church of Nativity staff for their hospitality and support – especially Fr. Michael White, Tracy Giordano, John Baker, Gene Hartman, Pablo Sainz, along with their teams and the numerous Nativity ministers who assisted us today.

We are grateful for the music ministers who led us in the praise and worship of the Lord. Thanks to Holly Novotny, Fr. Austin Murphy, and Airryn Sorto for their powerful witnesses. We greatly appreciate the presence of our Central Services colleagues with whom we share our mission daily.

And, of course, thanks to our presenters, Deacon Keith Strohm, Lisa Metcalfe, and our emcee Deacon Curtis Turner, for inspiring us today. Thank you Archbishop Lori, Bishop Parker, Bishop Lewandowski, Msgr. O'Connor, Fr. Proffitt, and Deacon Yeung for your leadership, and Fr. Kline and the seminarians for your service. We give special thanks to our sponsors for making this day possible.

And most of all, thank YOU for your ministry, dedication, and care for the people of the Archdiocese of Baltimore. We are grateful to be with you as *Coworkers in the Vineyard!*

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