



## TPM 585 Leadership in Governance: Parish Administration as Ministry Case Study and Toolbox

### Description

This is a two-part assignment for a one-week intensive course on Church Leadership and Governance. The first part, a *case study*, informs the second part, which is a *toolbox for ministry*. Ministry can be lonely. Ministers spend a lot of time reinventing the wheel. This assignment responds to that reality and equips new graduates with resources for various topics they might encounter. Upon completion of this assignment, students will have tools for dealing with parish ministry issues, including: governance; day-to-day administration, including hiring, mentoring, leading, dealing with difficult situations potentially leading to someone being dismissed; finances; and working with volunteers.

### Case Study Overview

- Each pair will prepare and present a case study relating to the area for which they are responsible. The case can be one that is based on experiences of individuals in the pair or on stories they have heard around which they provide additional details. No pair should use a case study in its entirety from a written or other resource.
- Pairs will be assigned both an area of focus (e.g., vestry, hiring, finances, etc.) and a context (i.e., size and condition of parish).
- Pairs will write the problem, not fix the problem. They will define and describe the context, leadership, important players, the problem itself, and immediate reactions to the situation.
- Pairs will present their case studies for larger group discussion on the final days of the intensive course. Groups assess one another and offer feedback which will then inform the Toolbox.

### Toolbox Overview

- The outcome of this assignment is a practical guide (toolbox) that will be a compendium of each group's work that can be used, shared and updated for future use.
- Use your research and the responses to the Case Study assessment survey to create resources for your topic.
- The toolbox is due two weeks after the end of the intensive course.



**TPM 585 Case Study Directions**

**Purpose:**

- To become familiar with what may happen in governance and administration of a parish and how to handle what arises.

**Outcome:**

- A case study to present to peers.
- Groups will process the case studies on Friday and assess what tools, skills, and resources are necessary to address the situation. This information will become part of the Toolbox.

**Expectations:**

- Each group will prepare and present a case study relating to the topic for which they are responsible. Groups are responsible for describing what has happened but not for resolving the issue. Set the stage for a substantive larger group conversation about what to do in this particular situation. If this happened at your parish, what are the resources that you would go seek in order to resolve the problem?
- The case study will include the following information:
  - Context
  - The problem itself
  - Leadership
  - Important players
  - Immediate reactions to the situation
- The case study will be 3-4 pages, double-spaced

**Process (One-Week Intensive Course)**

- Tuesday
  - On Tuesday, students will draw a number which designates both their *partner* and their *context* (i.e., size and condition of parish). Students will be in pairs for this activity.
  - Once students have found their partner, they will draw from a second basket containing topics for the case study.
  - (Pair topics will be grouped jigsaw style with different topics for the group discussion on Friday).
  - Begin to write background for your topic and context.
- Wednesday



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- When you have an idea of your background, focus on: who the leadership is; important players; immediate reactions to the situation. If the priest is the sole actor in the scenario, you can include how the situation is making you feel.
- Thursday
  - Once you have your background, context, and leadership in place, think about possible outcomes, decisions, and effects as well as possible reactions in the parish. This also the time to think about possible resolutions/means of addressing the situation. You will not present these as part of your written case study, but they will be addressed in the group conversation.
  - Case studies are due by 6PM on Thursday to the discussion thread on myVTS.
  - Read all case studies in preparation for Friday's class.
- Friday and Saturday
  - Partners will be put into groups do discuss case studies. Each case study will have approximately 45 minutes to discuss the context, situation, key players, and possible solutions. Groups will spend significant time on possible solutions to the case study as presented. The authors of the case study will participate in that conversation, but all members are expected to participate.
  - After each case study, groups will take 5 minutes to complete a survey about the case study. These responses will support the creation of a Toolbox.

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## Resources for Case Studies

- Advice on how to build, assess, and discuss a case in the classroom. Also useful for teachers.  
<https://www.cmu.edu/teaching/designteach/teach/instructionalstrategies/casestudies.html>
- Resource on creating and using case method in a class setting. Includes questions for discussions. <http://www.bu.edu/ctl/teaching-resources/using-case-studies-to-teach/>
- Newsletter from Stanford University about teaching with case studies:  
[https://web.stanford.edu/dept/CTL/cgi-bin/docs/newsletter/case\\_studies.pdf](https://web.stanford.edu/dept/CTL/cgi-bin/docs/newsletter/case_studies.pdf)
- Resource for writing a case study analysis. Note that for this assignment, you are not proposing a resolution.  
<https://awc.ashford.edu/tocw-guidelines-for-writing-a-case-study.html>
- A fairly comprehensive primer on case studies and how to use them in education as well as how to write them: <https://serc.carleton.edu/sp/library/cases/what.html>
- For Teachers, on how to use case studies in a course. Especially useful because it offers advice on what sorts of courses work well with case method. Also deals with discussion of cases in class.  
[https://case.hks.harvard.edu/content/Teaching%20with%20Cases\\_Faculty%20Tip%20Sheet.pdf](https://case.hks.harvard.edu/content/Teaching%20with%20Cases_Faculty%20Tip%20Sheet.pdf)
- A comprehensive handout on creating and implementing a case study:  
<https://www.ryerson.ca/content/dam/lt/resources/handouts/CaseMethodBestPractices.pdf>



## Case Study Discussion Plan

- Groups of 2-4 case studies.
- Each pair presents their case study. Each case study discussion should take approximately 45 minutes.
- Select someone to keep time. You have 35 minutes to discuss and 10 minutes to fill out the survey (questions on next page).
- For each case study presented, discuss the following:
  - The texts were read last night. Spend 5 minutes answering clarifying questions.
  - Context, Problem, Key Players
    - What is the issue?
    - What is the goal of the analysis?
    - What is the context of the problem?
    - What key facts should be considered?
  - Possible Resolutions
    - What alternatives are available to the decision-maker?
    - What would you recommend — and why?
    - What criteria will you use to evaluate your solution?
    - What do the possible resolutions mean for leadership. What are possible effects?
  - Necessary Resources
    - What information do you need? Where/how could you find it?
    - Is it possible for the leadership to resolve this case without outside help? Why or why not?
  - Summary and Process
    - Ask questions that call for students to examine their own assumptions, substantiate their claims, provide illustrations, etc.
    - Try to bring the various strands of the discussion back together at the end, so that students see what they have learned and take those lessons with them.

At the end of each case study, group members take 10 minutes to respond to survey about the case study, including resources and questions. This survey will assist the Toolbox team in completing their task.

Questions are adapted from the following sources:

- <http://www.bu.edu/ctl/teaching-resources/using-case-studies-to-teach/>
- <https://www.brown.edu/about/administration/sheridan-center/teaching-learning/effective-classroom-practices/case-studies>
- <https://www.cmu.edu/teaching/designteach/design/instructionalstrategies/casestudies.html>

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## **Case Study Assessment Questions (Post-Discussion)**

- Have you experienced a similar issue in a church? In what ways was it similar, and how did it differ?
- Describe the resolution you would try to facilitate based on the information you discussed.
- How would the resolution change if this situation occurred in a different context?
- Given your own strengths and weaknesses, what would you need to outsource to resolve this issue?
- If you were the only priest in a parish that dealt with this issue, what resources would you want to have?



## TPM 585 Toolbox Project Directions

### Rationale

- We all use toolboxes in the different areas of our lives. Some toolboxes are physically tangible and others are virtually tangible. The purpose of the toolbox project is to provide each student with an opportunity to build one section of a bigger toolbox that contains information and resources upon which they can build and grow.

### Outcomes

- A comprehensive toolbox of resources and best practices for parish clergy and lay leaders.
- A one-stop resource for topics relating to parish governance and parish administration
- A searchable, living resource that can be shared, updated, enhanced, etc

### Choosing Topics

- Students will complete a Google Form to offer their preference (1-4) of category.
- The expectation is that there will be 4-6 students in each group. The instructor will make every effort to assign students to their 1st or 2nd choice, but cannot guarantee this. For details about the project, you can consult either myVTS or the toolbox website

### Organization

The toolbox is organized into the following categories and subcategories that you will recognize from the Case Study assignment:

- Parish Governance – People
  - New Vestry Members: Discernment and recruitment
  - Onboarding/annual retreat
  - Training and development/assessment
- Parish Governance – Nuts and Bolts
  - vestry handbook
  - "position" descriptions
  - setting and updating policies and procedures
  - norms and expectations
  - meeting organization and preparation
- Parish Administration – Mission, Program, Finances, Physical Plant
  - Mission/Vision/Strategic Planning (Risk Management may be included)
  - Assessment/Evaluation Programs
  - Finances
    - Budgeting
    - Stewardship
    - Endowment
  - Physical Plant
- Parish Administration – Personnel (paid and volunteer)
  - Personnel
    - Hiring
    - Assessment/Evaluation Personnel
    - Downsizing/firing
  - Volunteers
    - Discernment at all the stages of the cycle
    - Position descriptions and expectations

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## Contents

Each category and subcategory will contain the following elements:

- **Section 1: Topic Overview**
  - The text will provide an overview of the topic and introduce how to navigate your page of the toolbox and what the user will find embedded within the site. This is also where your group will demonstrate and share your knowledge and experience in this area to benefit others. You will use the resources and tools you came with and those you've acquired as part of the course (either provided or through additional research).
- **Section 2: At least 1 Bible Study related to the topic:**
  - you should include the Bible passage itself, and not just the reference (you are not limited to the NRSV)
  - questions for consideration
  - brief statement indicating why you've chosen the specific passage(s)
- **Section 3: Case Studies**
  - You will include the cases presented in class that correlates to the area;
  - You may include other cases you have come across that further elucidate the complexities and best practices within the given area
- **Section 4: "Best practices"**
  - examples and resources you have come across in your research (could be a vestry handbook from a parish, position descriptions—for paid and volunteer personnel, etc.)
- **Section 5: A comprehensive list of resources (no fewer than 5 new resources)**
  - Include a brief description of the resource (this website can be helpful for matters pertaining to...; this book is long and contains some outdated information, but the chapter on X remains a good resource for Y);
  - Consider organizing the resources into different categories such as "everyone must have", "avoid at all cost", etc.
- **Section 6: For further consideration (optional)**
  - This is where you will include questions for further consideration.
  - Resources you have determined are lacking and should be added to the toolbox.
  - Learnings you want to share that don't fit into the other sections, such as advice you'd like to share, or questions you'd like answered a more seasoned priest, vestry member, etc.



**Case Study Rubric**

	26-30 points	22-25 points	18-21 points	13-17 points
Context and Problem	The presentation of the parish context and the problem is coherent and concise, with little further clarification needed in order to understand and address the presenting issue.	The presentation of the parish context and the problem is relatively coherent and concise, with only minimal additional	The presentation of the parish context and the problem is overly wordy and not fully coherent. Some additional clarification is needed in order to understand and address the presenting issue.	The presentation of the parish context lacks coherence and clarity. Additional clarification is needed in order to understand and address the presenting issue.
Leadership and Key Players	Leadership and key players are presented in a way that makes clear their role and relationship to the issue at hand.	Leadership and key players are not fully presented and there is a slight lack of clarity around their role and relationship to the issue at hand.	There is a certain lack of clarity around the role and relationship of the leadership and key players to the issue at hand.	There is an overall lack of detail making it difficult to determine the role and relationship of the leadership and key players to the issue at hand.
Immediate Reactions	The descriptions of the immediate reactions of leadership, key players, etc. provide a means for others to enter into the situation and better grasp the breadth of the presenting issue.	The descriptions of the immediate reactions of leadership, key players, etc. are helpful in providing a means for others to enter into the situation, but lack depth and clarity.	The descriptions of the immediate reactions of leadership, key players, etc. are superficial and/or incongruent	The descriptions make it very difficult to enter into the situation and fully understand the presenting issue.
Organization and Style	Information is presented in a completely logical, clear and concise manner. Sentences are well-constructed and error-free.	Information is generally presented in a logical, clear and concise manner. Sentences are well-constructed with only minimal typographical or grammatical errors.	Information is presented in a somewhat disorganized way; thoughts are incomplete or difficult to follow. Sentences are not consistently well-constructed and there are more than minimal errors—both typographical and grammatical.	Information is presented in a disorganized way making it very difficult to follow. Sentences are poorly constructed and contain typographical and grammatical errors.



**Toolbox Rubric**

	<b>45-40 points</b>	<b>39-35 points</b>	<b>34-30 points</b>	<b>30-27 points</b>
<b>Resources</b>	The list of resources provided is extensive and covers several resources not introduced in the course; the explanatory synopses are well-written, concise and provide a comprehensive introduction to the resources and how best to use them.	The list of resources provided is more than adequate and includes at least one resource not introduced in the course; the explanatory synopses are well-written and provide a more than adequate introduction to the resources and how they might be used.	The number of resources is adequate, but does not introduce anything new; the explanatory synopses are incomplete and lack clarity, particularly in how they might be used.	The number of resources is less than adequate and includes no new suggestions; the explanatory synopses are lacking in clarity and direction.
<b>Subject knowledge</b>	The content and explanatory texts (including the terms, case studies and best practices) demonstrate an in-depth understanding of the subject offering an entry point for others to engage the topic at a deeper level.	The content and explanatory texts (including the terms, case studies and best practices) demonstrate a moderate understanding of the subject adequately answering both basic and contextual questions.	The content and explanatory texts (including the terms, case studies and best practices) demonstrate only a basic understanding of the subject with only minimal best practices and suggestions for use and consideration.	The content and explanatory texts (including the terms, case studies and best practices) are almost solely text quoted from readings and other resources providing only a superficial glimpse into best practices and suggestions for use and consideration.
<b>Organization and style</b>	Information is presented in a completely logical, clear and concise manner. Sentences are well-constructed and error-free.	Information is generally presented in a logical, clear and concise manner. Sentences are well-constructed with only minimal typographical or grammatical errors.	Information is presented in a somewhat disorganized way; thoughts are incomplete or difficult to follow. Sentences are not consistently well-constructed and there are more than minimal errors—both typographical and grammatical.	Information is presented in a disorganized way making it very difficult to follow. Sentences are poorly constructed and contain typographical and grammatical errors.