Polarity Thinking for Congregational Leaders

Reframing Competing Needs and Values

Jan Gartner
UUA Compensation and Staffing Practices Manager

Polarity Thinking™ is based on the work of Barry Johnson, Creator of the Polarity Map® and Principles.

With gratitude to Cliff Kayser, Partner and VP for Coaching and Mastery at Polarity Partnerships, LLC
Our Time Together

What is a polarity?
How Polarities Work
Leveraging Polarities
Mapping a Polarity
Examples, Applications, and Tips
The Beauty of Polarity Thinking
Polarities to Explore
What is a Polarity?

Not this!
Polarities are Interdependent Pairs

Activity **AND** Rest

- Both needed
- Mutually supporting
  - Activity helps you rest
  - Rest helps you be active

Dynamic tension between 2 GOOD THINGS

Image by [Dave Francis](https://pixabay.com) from [Pixabay](https)

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Polarities are Unending

1. **Upside of left pole**
   Name good outcomes of focusing on activity.

2. **Downside of left pole**
   What happens with an over-focus on activity, to the neglect of rest?

3. **Upside of right pole**
   Name good outcomes of focusing on rest.

4. **Downside of right pole**
   What happens with an over-focus on rest, to the neglect of activity?

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Leveraging a Polarity

Maximize the upsides

Greater Purpose: Well-being

Minimize the downsides

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What concrete things can we do to gain or maintain the positive results of focusing on this pole?

Early Warnings***
Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.

What indicators will warn us that we are over-focusing on this pole to the neglect of the other pole?

Greater Purpose Statement (GPS) – why leverage this polarity?

**Greater Purpose**

If we focus on this pole (need or value), what positive results should we expect to see?

Need or Value #1

If we over-focus on this pole to the neglect of the other, what negative results will we see?

Early Warnings

Fears = negative results of over-focus on the left pole to the neglect of the right pole

What indicators will warn us that we are over-focusing on this pole to the neglect of the other pole?

FEAR (Loss of Greater Purpose)

Deeper Fear – Loss of GPS

First do all inner boxes, then action steps and early warnings.

Action Steps

How will we gain or maintain the positive results from focusing on this left pole? What? Who? By When? Measures?

Action Steps

How will we gain or maintain the positive results from focusing on this right pole? What? Who? By When? Measures?

What concrete things can we do to gain or maintain the positive results of focusing on this pole?

DEEPER FEAR

Loss of GPS

Greater Purpose Statement (GPS) – why leverage this polarity?

**Greater Purpose**

If we focus on this pole (need or value), what positive results should we expect to see?

Need or Value #2

If we over-focus on this pole to the neglect of the other, what negative results will we see?

Early Warnings

Fears = negative results of over-focus on the right pole to the neglect of the left pole

What indicators will warn us that we are over-focusing on this pole to the neglect of the other pole?

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Examples

Personal
Candor and Diplomacy
Self-care and Care for Others

Business
Cost and Quality
Short-term and Long-term Goals

Congregational*
Tradition and Innovation
Inreach and Outreach
Call (inspiration) and Duty (obligation)

*From Managing Polarities in Congregations, by R. Oswald and B. Johnson
Applications for Leaders

Task and Relationship
Meetings and Retreats
Supervision
Covenant work

Appreciate and Critique*
Staff and program evaluations
Interim professional work

Collaborative and Autonomous
Staff structure and relationships

* Thanks to Rev. Dr. Larry Peers

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Tips for Using Polarities

1. Train yourself to say “and,” e.g., activity and rest (not “or,” not “versus”)

2. Make pole names similarly neutral or positive (not activity and sloth)
   
   *Convention: put the naturally favored pole (when there is one) on the left.*
   
   *Note: what feels positive or neutral to you might have a negative connotation for someone else.*

3. Be intentional about your Greater Purpose Statement (GPS).
   
   *Why is it important to leverage this polarity? You might discover different opinions!*

4. Get physical: Trace your finger along the infinity figure, “walk” it on the floor, or follow the shape with your arm, identifying upsides and downsides as you go.

5. Assess how well you are leveraging the polarity by rating yourself on each quadrant.

6. Are you taking action steps? Heeding early warnings?
The Beauty of Polarity Thinking

Reframe **competing** needs as **complementary**

Interdependence

Greater Purpose

Nonbinary

Unending
Reimagining for Resilience

Evolving Reflections on Congregational Staffing and More

Jan Gartner
UUA Compensation and Staffing Practices Manager
Sabbatical Project, February 2019
Five Polarities to Explore and Leverage

For each polarity, you will find
Greater Purpose, Reflection Questions, and Map

1. Reliance on staff AND Reliance on Laity
2. Well-staffed congregation AND Well-compensated staff
3. Mission, Values, Goals AND Finance, Operations, Administration
4. Preventive and Well-boundaried AND Generative and Open
5. Complexity AND Simplicity

How well are you leveraging each of these polarities?

Study the polarity maps
Polarity #1

Reliance on Staff AND Reliance on Laity

Greater Purpose: Fulfilling Mission

Reflection Questions

• What specialized skills/expertise must you be able to count on?
• Are staff feeling over-burdened? What about lay leaders?
• Do staff feel supported by the laity? Do laity feel supported by staff?
• Is ratio of personnel costs to budget relatively stable?
• Can the Sweet Spot model* be used to set priorities for lay and staff work?
• If volunteer positions are hard to fill, why?
• Are expectations realistic relative to energy and resources?

* https://www.uua.org/leadership/blog/sweet-spot

How well are you leveraging this polarity?

Study polarity map on next slide
Values = positive results of focus on the right pole

Values = positive results of focus on the left pole

Fears = negative results of over-focus on the left pole to the neglect of the right pole

Fears = negative results of over-focus on the right pole to the neglect of the left pole

Action Steps
How will we gain or maintain the positive results from focusing on this left pole? What? Who? By When? Measures?

A. Check for alignment of staff roles/job descriptions with needs
B. Clarify skills/expertise needed that can’t always be found in lay leaders
C. Staff evaluations, including how staff interact with and mobilize lay leaders; staff satisfaction
D. Use “sweet spot” to set priorities for staff work

Early Warnings
Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.

A. Ratio of personnel costs to overall budget is rising
B. Staff roles keep expanding
C. Hard to fill volunteer positions because need not understood

Action Steps
How will we gain or maintain the positive results from focusing on this right pole? What? Who? By When? Measures?

A. Outline and check for realistic expectations for volunteer roles
B. Ensure volunteer positions exist to suit various schedules, interests, leadership levels, etc.
C. Resist temptation to “throw a staff position” at a need
D. Use “sweet spot” to set priorities for lay work

Early Warnings
Measurable indicators (things you can count) that will let you know that you are getting into the downside of this right pole.

A. Frustration with critical tasks going undone or done poorly
B. Staff roles not well understood; staff are underutilized
C. Hard to fill volunteer positions due to lack of interest and/or skills

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Polarity #2

Well-staffed congregation AND Well-compensated staff

Greater Purpose: Happy, effective staff

Reflection Questions

• Is staff treatment consistent with congregational mission and values?
• Is leadership inquiring about staff satisfaction and needs?
• Is staff development considered important?
• If staff are unhappy or leaving, is it primarily due to workload, environment, or pay?
• How is pay set and monitored?

How well are you leveraging this polarity?

Study polarity map on next slide
Values = positive results of focus on the left pole

- Work gets done
- Reasonable job scopes
- Build specialization and competence
- Congregation’s expectations of staff met

Values = positive results of focus on the right pole

- Attract, retain, and develop excellent staff
- Motivated workforce
- Congregation practicing economic justice

Fears = negative results of over-focus on the left pole to the neglect of the right pole

- Staff frustration/turnover due (primarily) to low comp
- Congregation’s values compromised
- Administrative or financial pressures due to staff size

Fears = negative results of over-focus on the right pole to the neglect of the left pole

- Staff frustration due (primarily) to workload
- Congregation expects more from staff
- Budgetary pressures due to high compensation

**Happy, Effective Staff**

Well-Staffed Congregation

- Work gets done
- Reasonable job scopes
- Build specialization and competence
- Congregation’s expectations of staff met

Well-Compensated Staff

- Attract, retain, and develop excellent staff
- Motivated workforce
- Congregation practicing economic justice

**Unhappy and/or Ineffective Staff**

Deeper Fear – Loss of GPS

- Staff frustration/turnover due (primarily) to low comp
- Congregation’s values compromised
- Administrative or financial pressures due to staff size

- Staff frustration due (primarily) to workload
- Congregation expects more from staff
- Budgetary pressures due to high compensation

**Early Warnings**

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.

A. Staff complaints or departures about pay (more than workload)
B. Monitor alignment of congregation’s expressed values with its internal practices
C. Systemic difficulty keeping up with appropriate staffing practices (onboarding, FLSA, etc.)

**Early Warnings**

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this right pole.

A. Staff complaints or departures about workload (more than pay)
B. Staff work falling through the cracks
C. Personnel costs rising as percentage of budget

**Action Steps**

How will we gain or maintain the positive results from focusing on this left pole? What? Who? By When? Measures?

A. Ensure staffing that meets identified needs
B. Ensure appropriate staff development
C. Check in w/staff re job satisfaction and needs

A. Ensure good pay policies (relative to local norms and UUA standards)
B. Ensure appropriate staff and development
C. Check in w/staff re job satisfaction and needs

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Polarity #3

Mission, Values, Goals AND Finance, Operations, Administration

Greater Purpose: Congregation operates with integrity and consistency

Reflection Questions

- Do budget and operations support mission and goals?
- Are staff and lay leaders clear about purpose and priorities?
- Are organizational values expressed through administration?
- When problems arise, are they typically more operational or relational?
- What is the identity of the congregation – in the community and in the Association?
- What metrics do you track? What does this say about what you value?

Study polarity map on next slide
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**Deeper Fear**

- Loss of GPS

**Greater Purpose Statement (GPS)**

- why leverage this polarity?

**Mission Values Goals**

- Congregation is meeting its stated purpose
- Congregation is living its values
- Congregation makes a difference to individuals, community, and world

**Finance Administration Operations**

- Congregation is in compliance on legal, tax, & employment matters
- Congregation has sound budgeting practices and operates within budget
- Structures and processes are clear and help cong run well

**Early Warnings***

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.

A. Leadership begins to be burdened by legal/administrative problems
B. Budgetary problems
C. Board and staff meeting agenda items are largely “reactive”

**Early Warnings***

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this right pole.

A. Leadership cannot articulate mission/values/goals
B. Relational problems among leaders
C. Board and staff meeting agenda items don’t reflect big-picture focus

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**Congregation Operates with Integrity and Consistency**

- Leadership assesses church activities relative to mission alignment and fulfillment
- “Countables” such as attendance, program participation, mission stats
- Identity of congregation in community and UUA consistent with stated mission/values

**Congregation Lacks Integrity/Consistency**

- Leadership begins to be burdened by legal/administrative problems
- Budgetary problems
- Board and staff meeting agenda items are largely “reactive”

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Polarity #4

Preventive and Well-boundaried AND Generative and Open

Greater Purpose: Processes and practices promote health and relationships

Reflection Questions

• Where and how is anxiety evident in your congregation?
• What kinds of leadership risks are encouraged? Discouraged?
• Are opportunities lost due to fear of saying/doing the wrong thing?
• How much energy goes into protecting against negative outcomes versus producing positive ones?
• Are policies reviewed regularly, assessed for usefulness and sync with mission/values?
• Are staff trained for safety? For deepening and mobilizing the laity?
• Are professionalization programs primarily evaluative or formative?

How well are you leveraging this polarity?

Study polarity map on next slide
Polarity #5

Complexity and Simplicity
Greater Purpose: Effective Communications and Processes

Reflection Questions

- Are the goals of your communications and processes clear?
- Do details, explanations, and examples add clarity? Utility? Enjoyment?
- Are written communications reviewed for readability, usefulness, interest?
- Have you assessed processes through learning style and intercultural lenses?
- What is the reasoning behind special cases and exceptions? Who benefits?
- Do you need to do everything you’re doing? Are there things you can simplify?

How well are you leveraging this polarity?

Study polarity map on next slide
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Fears = negative results of over-focus on the left pole to the neglect of the right pole

Values = positive results of focus on the right pole

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**Greater Purpose Statement (GPS)**

- why leverage this polarity?

**Effective Communications and Processes**

- Better applicability and functionality through features or details
- Recognizing that one size does not fit all; honoring differences, providing options
- Keeping up with regulatory changes, new circumstances
- Incorporating potential future needs to allow for longer use or better adaptation over time
- Explanations and examples add clarity and for enjoyment; metaphors provide richness

**Ineffective Communications and Processes**

- Extra features lose people and distract from main functionality and purpose
- Attempting to account for every possibility through exceptions and details is confusing to most
- Striving to build for future unknowns complicates the present
- Explanations and examples add length and difficulty that detract from message
- Trying to do too much; stress

**Complexity**

- So basic that it doesn’t account for common situations
- Lack of allowance for special cases disadvantages some
- Updates to process or document not frequent enough, fail to keep up with important changes
- Crisp writing may be uninteresting and/or fail to provide sufficient explanation

**Simplicity**

- Better practicality by making things easy to understand and use
- Maintaining evenhanded approach by avoiding exceptions and special cases
- Concentrate on the basics
- Keeping things stable, making changes only as necessary
- Conciseness allows people to more easily absorb key points

**Action Steps**

How will we gain or maintain the positive results from focusing on this left pole? What? Who? By When? Measures?

A. Proposed additions and “improvements” are assessed for pros and cons, usefulness across situations
B. Communications and processes assessed thru learning style and intercultural lenses
C. Ask who benefits from making exceptions
D. Challenge ourselves to include fun, interesting examples
E. Check for clear strategy and goals

A. Communications and processes assessed for readability and usefulness
B. Ask who benefits and who is disadvantaged by avoiding exceptions
C. Challenge ourselves with word/page limits
D. Check for clear strategy and goals

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Can I help you make use of polarities in your congregation?
Please be in touch!

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