

# Trinity Episcopal Church

## Houston, Texas

### **Policy:** Conflict Resolution

**Adopted:** Vestry meeting of 16 December, 2014.

**Purpose:** To establish a process for conflict management and reconciliation at Trinity Episcopal Church in an environment that is conducive to the objective consideration and resolution of grievances, complaints, and communication problems (“Issues”) and to foster communication among all involved parties.

“Stakeholders” in Trinity Episcopal Church, in this context, may include Clergy, Staff, the Vestry, Vestry members, Ministry Team heads, Ministry Team members, Parish members, and facility users.

This Policy is available to address Issues between and among Stakeholders in Trinity Episcopal Church, but is specifically not for use in addressing: (a) employment complaints or issues that may arise by paid staff members with the employer, Trinity Episcopal Church, as such employer/employee issues are governed by The Employee Handbook for Trinity Church, Houston, and any other then effective policies, rules, statutes, and regulations as may be applicable; and (b) Issues that were posed by Stakeholders in discussions with Turner Mediation prior to the completion and delivery of its report to the Vestry in June 2010.

**Basis for the Policy and its Implementation:** The goal is to develop, refine, and implement a conflict resolution process so that Issues do not adversely affect the overall Trinity community spiritually, emotionally, or fiscally. Foundational principles necessary to support a viable conflict resolution process include:

1. Education and communication with the Stakeholders concerning the policy and the process.
2. Acknowledgement of a scriptural basis for conflict resolution between brothers and sisters in Christ consistent with the Episcopal tradition.
3. An environment of mutual respect for each other and the process.
4. A commitment by all to fundamental fairness.
5. A willingness of all parties to acknowledge the existence of an Issue.
6. Open communication between the parties during the process.
7. Holding Stakeholders accountable to use the conflict resolution process.
8. Holding Stakeholders accountable to the agreements they make in resolving their Issue.

**Members of the Team:** The Ministry of Reconciliation Team members are appointed under the following process:

1. Appointed by Vestry on nomination by Senior Warden. Anyone appointed must meet the criteria then in effect for being nominated to serve on the Vestry. Persons serving on the board of the Trinity Church Endowment who are otherwise eligible to serve on the Vestry may serve on the Ministry of Reconciliation Team.

2. Two year terms staggered so that the terms of one-half of the members expire each year. Members may serve two consecutive terms but then must take at least a one year break in service. For the appointment of the initial members, two or three of the members shall be appointed to one year terms and the other two or three members shall be appointed to two year terms. If a vacancy occurs before the expiration of a member's term, a replacement member may (or shall if necessary to maintain the minimum number of members) be appointed to serve the remainder of the unexpired term under the procedure set out above.
3. The members shall elect their presiding member (the "Team Coordinator").
4. At least four but not more than six members shall be appointed, one (only) of whom shall be a member of the Vestry.
5. Members ideally include at least one person who regularly attends each of the regular services (Sundays at 8:00 a.m., 10:30 a.m., 12:30 p.m., and Wednesdays at 6:00 p.m., as of August 2010).
6. Members shall abide by the confidentiality requirements set out in this policy.

**Procedure:**

1. **Informal Process (self-help)** -- As a prerequisite to invoking the formal conflict resolution procedure, the Requesting Person first agrees to exhaust the steps of the Informal Process. If the Requesting Person is not comfortable initiating the Informal Process, members of the Team will be available to assist the Requesting Person in initiating the Informal Process. The Informal Process consists of the following elements and steps:
  - a. If the Issue does not involve the Rector:
    - i. Speak to the Other Party directly. To prepare for this discussion:
      1. Identify the Issue: where did it start?
      2. Identify who the Issue involves: not who "knows about it," gossips about it, or supports you in the Issue, but rather, who the Issue involves and is needed to resolve the Issue.
      3. Identify what outcome you would like.
    - ii. If the Issue is not resolved between the parties, the parties have the choice of taking the issue to the Rector or requesting intervention by the Ministry of Reconciliation Team.
  - b. If the Issue involves a member of Clergy:
    - i. Speak to him/her privately. To prepare for this discussion:
      1. Identify the Issue: where did it start?
      2. Identify who the Issue involves: not who "knows about it," gossips about it, or supports you in the Issue, but rather, who the Issue involves and is needed to resolve the Issue.
      3. Identify what outcome you would like.
    - ii. If the issue involves one of the other Clergy and it is not resolved, the parties have the choice of taking the issue to the Rector or requesting intervention by the Ministry of Reconciliation Team.

- iii. If the issue involves the Rector, and the issue is not resolved, the parties may request intervention by the Ministry of Reconciliation Team.
- iv. If the Issue involves a charge of misconduct or moral impropriety against the Rector it should be reported directly to the Senior Warden, who will report the matter to the Diocesan Bishop.
- v. If the Issue involves an assisting priest it should be reported directly to the Rector, who will report the matter to the Diocesan Bishop.
- vi. If the Issue is one of a lack of effort, confidence or compatibility between the Rector and the community, the Issue may be brought to the full Vestry and be placed on the agenda at a regularly scheduled Vestry meeting for the Vestry's consideration and resolution.

## **2. Formal Process**

- a. Initiation by Involved Party: Any Issue to be brought to the Team shall be in writing (the Formal Request), shall include the following information, and can be presented to any member of the Team:
  - i. Who you are (the Requestor) and with whom does the Issue exist (the Other Party).
  - ii. When the Issue first arose.
  - iii. What the Issue is, in your own words.
  - iv. What you have done to reconcile the Issue informally.
  - v. What the response has been to the informal reconciliation efforts.
  - vi. Who, if anyone, on the Team the Requestor does not believe could fairly serve in helping to resolve their particular Formal Request.
  - vii. What the Requestor would consider as the ideal outcome of the process.
  - viii. What the Requestor would consider as another acceptable outcome of the process.

The actual Formal Request document and the substantive information of the Formal Request and the identity of the parties involved shall be considered confidential. The Requestor may agree, in writing, that the actual Formal Request document can be shared with the Other Party.

The Requesting Party also agrees that he or she will not share the actual Formal Request with any person outside his or her own household in the spirit of confidentiality and in the spirit of hope that the Issue will be successfully resolved and that no practical benefit can be served by publishing the Formal Request to anyone outside of this process and that, to the contrary, publishing the Formal Request to others not directly involved in the process is more likely to injure the process and to injure the parties and relationships involved.

To facilitate the discussion and resolution of the Issue, the substance of sections ii through v above may be shared with the Other Party by the Team, but not the actual Formal Request document. The actual Formal Request document may be shared with other members of the Ministry of Reconciliation Team if deemed helpful or necessary, but will remain confidential otherwise.

The Team member receiving the Formal Request will review the request, confer with the Team Coordinator, and the Team Coordinator will assign two Team Members to the Formal Request. The two Team Members will be assigned on the basis the Issue involved and the Stakeholders involved. The Team Members will determine whether the assistance of the Rector or any other member of the Clergy staff would be helpful to the process and may request such assistance with the agreement of the Requestor and the Other Party.

The assigned Team Members will confer first with the Requestor.

The assigned Team Members will then confer with the Other Party.

The assigned Team Members will then confer jointly with the parties. In the joint conference:

- a) The Team Members will serve to moderate the discussion.
- b) The Parties will reiterate and acknowledge that the meeting and discussion is a forum of mutual respect.
- c) The Parties will reiterate and acknowledge that they are all present in good faith and for the purpose of achieving a mutually agreed resolution of the Issue and have set aside sufficient time to give the Issue their serious and undivided attention.
- d) The Team Members will moderate, as needed, the direction of the discussion to eliminate or set aside non-issues and less important concerns so that the core Issue or Issues can be focused upon and resolved.
- e) The Team Members will determine if an additional meeting or meetings would be beneficial if the Issue is not resolved in one joint meeting.
- f) The Team Members will draft a written agreement or covenant which documents the resolution of the Issue as agreed upon by the parties (Final Resolution Agreement). A copy of the Final Resolution Agreement will be provided to the parties and to the Team Coordinator for retention as part of the formal records of the Ministry of Reconciliation Team. The actual Final Resolution Agreement shall be treated as confidential unless all parties agree in writing in the document to the contrary.
- g) The Team Members will determine if assistance from an outside party would benefit the resolution process for a particular Formal Request that is not resolved by the parties themselves. Referral to an outside party should happen only with the concurrence of the entire Ministry of Reconciliation Team to provide assurance of consistency in referrals to outside parties for assistance.

- b. Initiation by Reconciliation Team:** The Team may initiate the formal conflict resolution policy after consultation with the Rector and Senior Warden by:
- i. Requesting that the involved parties participate in the formal process.
  - ii. One or both may provide in writing
    1. When the Issue first arose.
    2. What the Issue is, in your own words.
    3. What you have done to reconcile the Issue informally.
    4. What the response has been to the informal reconciliation efforts.
    5. Who, if anyone, on the Team the Requestor does not believe could fairly serve in helping to resolve their particular Formal Request.
    6. What the Requestor would consider as the ideal outcome of the process.
    7. What the Requestor would consider as another acceptable outcome of the process.

The actual Formal Request document and the substantive information of the Formal Request and the identity of the parties involved shall be considered confidential. The author may agree, in writing, that the actual Formal Request document can be shared with the Other Party.

Both parties agree that he or she will not share the actual Formal Request with any person outside his or her own household in the spirit of confidentiality and in the spirit of hope that the Issue will be successfully resolved and that no practical benefit can be served by publishing the Formal Request to anyone outside of this process and that, to the contrary, publishing the Formal Request to others not directly involved in the process is more likely to injure the process and to injure the parties and relationships involved.

To facilitate the discussion and resolution of the Issue, the substance of sections 1 through 4 above may be shared with the Other Party by the Team, but not the actual Formal Request document. The actual Formal Request document may be shared with other members of the Ministry of Reconciliation Team if deemed helpful or necessary, but will remain confidential otherwise.

The Team member receiving the Formal Request will review the request, confer with the Team Coordinator, and the Team Coordinator will assign two Team Members to the Formal Request. The two Team Members will be assigned on the basis the Issue involved and the Stakeholders involved. The Team Members will determine whether the assistance of the Rector or any other member of the Clergy staff would be helpful to the process and may request such assistance with the agreement of the Requestor and the Other Party.

The assigned Team Members will confer first with the Requestor.

The assigned Team Members will then confer with the Other Party.

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- 2) The Parties will reiterate and acknowledge that the meeting and discussion is a forum of mutual respect.
- 3) The Parties will reiterate and acknowledge that they are all present in good faith and for the purpose of achieving a mutually agreed resolution of the Issue and have set aside sufficient time to give the Issue their serious and undivided attention.
- 4) The Team Members will moderate, as needed, the direction of the discussion to eliminate or set aside non-issues and less important concerns so that the core Issue or Issues can be focused upon and resolved.
- 5) The Team Members will determine if an additional meeting or meetings would be beneficial if the Issue is not resolved in one joint meeting.
- 6) The Team Members will draft a written agreement or covenant which documents the resolution of the Issue as agreed upon by the parties (Final Resolution Agreement). A copy of the Final Resolution Agreement will be provided to the parties and to the Team Coordinator for retention as part of the formal records of the Ministry of Reconciliation Team. The actual Final Resolution Agreement shall be treated as confidential unless all parties agree in writing in the document to the contrary.
- 7) The Team Members will determine if assistance from an outside party would benefit the resolution process for a particular Formal Request that is not resolved by the parties themselves. Referral to an outside party should happen only with the concurrence of the entire Ministry of Reconciliation Team to provide assurance of consistency in referrals to outside parties for assistance.

- c. Initiation by Third Party: A third party may contact the Ministry of Reconciliation Team, the Rector, or Senior Warden and request a conflict resolution process be initiated. The Rector, Senior Warden, and the Team will review the request and decide how to proceed. The Team will notify the third party of the decision. If it is decided to proceed with the conflict resolution process, the Team will follow the process as outlined under **b. Initiation by Reconciliation Team.**

Resolution Agreement Retention: The Team Coordinator for each year will be responsible for retaining the original Formal Request document, any response document, and the Final Resolution Agreement that documents the resolution of the Issue. The Team Coordinator will, each year, pass to his or her

successor the formal records of the Complaint Resolution Team for handling consistent with the confidentiality requirements of this policy. These records will not be stored on the church property and will not be considered part of the Parish archives or records. The retention period for these records shall be five years.

**Reports to the Vestry and the Rector:** The Ministry of Reconciliation Team, through its Team Coordinator or other designated person, shall report to the Vestry and the Rector on a monthly basis a statistical summary of the work of the Ministry of Reconciliation Team. The purpose of these monthly reports shall be to keep the Vestry and Rector generally apprised of the number and nature of the Formal Requests, the number and nature of the Final Resolution agreements, the number of pending or unresolved Formal Requests, and the number and nature of referrals to outside parties for assistance.

The Ministry of Reconciliation Team is expected to balance the confidentiality of the details of its work and the identity of the Stakeholders involved in the Formal Process with the obligation of the Vestry and Rector to provide effective leadership in the Parish. Toward that end, if the Ministry of Reconciliation Team determines, for example, a pattern of Issues involving particular Stakeholders, and particularly a pattern of unresolved Issues involving particular Stakeholders, then it shall be incumbent upon the Ministry of Reconciliation Team, with the advice and guidance of the Chancellor, to make such disclosures to the appropriate Stakeholders so that additional corrective or remedial action can be taken outside the scope of the Formal Process as may be in the best interests of the Parish.