Executive Leadership Development in The Episcopal Church:

Learning from Past Experiences and Narratives

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Acknowledgments

This degree represents another milestone on my path of lifelong learning. I recognize that I am surrounded by the love and support of a communion of saints, on earth and up above.

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"With your fellow bishops you will share in the leadership of the Church throughout the world."
(The Episcopal Church, 1979, p. 517)

Executive Summary

When Episcopal Church bishops transition from their role as pastor into their new ministry role, they are supported initially by a three-year program provided by The Rt. Rev'd David E. & Helen R. Richards College for Bishops. The College for Bishops and the *Living Our Vows* program help the new bishops understand their regional oversight responsibilities and equips them for transformative leadership. Living Our Vows is a unique formation program, specifically created for the context and ministry of the Episcopal Church. Beyond this three-year program, the College also provides ongoing continuing education opportunities focused on the unique role of bishops and the many facets of church leadership.

Despite the intentions of *Living Our Vows,* new bishops often struggle in their transition, grappling with an identity shift, a very different role from their previous one, external expectations, and a steep learning curve. In secular and business settings, by contrast, the identity shift and development of executive leader skills is expected to occur more rapidly. To promote a smooth transition and keep pace with the ever-evolving church, there is a documented need to decrease this learning curve so that bishops feel more comfortable in their role and thus become more effective leaders sooner. This capstone will help the College for Bishops and *Living Our Vows* curriculum, coaching, and conversations to be informed by these interviews and findings to equip new bishops better as they encounter their new executive leadership roles and responsibilities.

While traditional executive development has focused on skill-building (Day, 2000), new theories of leadership highlight identity change and its impact as a part of the development process (Ibarra & Barbulescu, 2010). The *Living Our Vows* program, while constantly innovating, largely relies on the traditional executive development approaches. The role of bishop requires the individual to incorporate executive skills within their call to serve Christ and the mission of Christ. To help new bishops accomplish this identity shift and expansion, I used the identity change provisional selves framework to examine the narrative associated with episcopate ministries. Using said framework, I posed the following research questions:

- How have the bishops come to identify themselves as executive leaders? How has that identity emerged over time?
- How do the sources of authority—canonical, ecclesial, and relational—play a part in developing their identity?
- What are the experiences of priests making the transition from cleric roles to leadership roles?
- How do the different phases of a career in the clergy contribute to the leadership identity?

Based on individual interviews with bishops at five stages of ministry, three concrete findings emerged about narrative identity and leadership skills:

- There is a transition time of 3-5 years before bishops feel comfortable in their new role, and sometimes in their new diocese/culture.
- There are necessary, but unexpected, changes in behavior, mindset, and skills based on the new executive leader position.
- The symbolic authority and identity role are intertwined for external interactions; these are often not recognized either by the new bishops or those within the community.

All recommendations were formed using the narrative identity and leadership development frameworks and how they build on each other when a priest steps into a new

religious, regional executive role. The following can be feasibly implemented by The Rt. Rev'd

David E. & Helen R. Richards College for Bishops. These recommendations include:

- Transition from the *Living Our Vows* coaching model to one of mentoring.
- Create a diocesan cohort learning program to enable bishops to share their learnings with close colleagues in a structured environment and break down external barriers.
- Embed reflections on and exploration of identity formation and shifts as a part of the *Living Our Vows* three-year curriculum.

The uniqueness of the vocational call combined with the different leadership skills

required of a bishop, not only as a formal hierarchical position but as an individual, within

complex diocesan and cultural contexts. The recommendations are intended to serve as a

reference for the College for Bishops in expanding the curriculum to expedite the successful

transition and identity transformation of individuals newly elected to the role of bishop in the

Episcopal Church. This research also serves to supplement the limited scholarly literature on

executive leadership development in the Episcopal Church and the episcopacy.

Definition of Terms

Diocese: The hierarchical structure of the Episcopal Church is based on regional, geographic,

and churchwide governance. A diocese is created from the parishes, ordained people, and

church members in that region. Each diocese has its own episcopal oversight with an elected or

appointed bishop. A diocese can correspond with a state or territory or cross over those

boundaries. Each Episcopal Church diocese also participates in churchwide affiliation and

governance (The Episcopal Church, 2000b). In the Episcopal Church, there are 109 dioceses

found in seventeen different countries (The Episcopal Church, n.d.). Each diocese has separate

finances and leadership structures.

Bishop: Every diocese has its own episcopal oversight with an elected or appointed bishop (The

Episcopal Church, 2000b). Current day bishops carry out the work of the first followers of Jesus,

the apostles, in what they are charged with doing. Bishops are tasked with: "guarding the faith,

unity and discipline of the Church, and ordaining men and women to continue Christ's ministry"

(Episcopal Diocese of Texas, n.d.). Beyond these stated tasks, each bishop is also the regional

leader for his or her diocese. This oversight includes the governance, finances, and diocesan

structures.

*Living Our Vows***:** *Living Our Vows* is the signature bishop formation program that the College

for Bishops developed and executed. The Episcopal Church Canons require that newly elected

bishops complete this program. Three summer residencies provide a strong foundation for their

new roles and provide episcopate-based context for their decisions (College for Bishops, n.d.).

The *Living Our Vows* topics covered include staff development, strategic visioning, worship,

Title IV (misconduct process), polity, organizational systems, and other relevant issues.

Frequently the topic format includes case studies, panel discussions, and small discussion

groups.

Introduction

Mainline American Protestant denominations, such as the Episcopal Church, are experiencing a great deal of uncertainty as the number of people who are unaffiliated with any religion has been rapidly increasing (Smith, 2021). According to Pew Research, between 2007 and 2021, Americans surveyed who identify as religious "nones" increased from 16% to 29% (Smith, 2021). The Episcopal Church itself has experienced a dramatic decrease in membership in all provinces and dioceses, domestic and foreign (The Episcopal Church, 2021). This decrease strikes at the heart of the Episcopal Church's ministry to reach out to others to share their faith:

> The ministry of a bishop is to represent Christ and his Church, particularly as apostle, chief priest, and pastor of a diocese; to guard the faith, unity, and discipline of the whole Church; to proclaim the Word of God; to act in Christ's name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ's ministry. (The Episcopal Church, 1979, p. 855)

In the ordination of new bishops, they vow to "share in the leadership of the Church throughout the world" (The Episcopal Church, 1979, p. 517). This leadership includes diocesan oversight, management, and visioning.

Typically, a bishop is elected from a slate of people, winning with a designated majority of votes from authorized ordained and lay representatives. The bishop is elected or affirmed by each diocese in which they serve. Dioceses and bishops from around the church then consent and endorse the election, and it is only then that the bishop's consecration goes forward (The Episcopal Church, 2000a). Once consecrated bishops have three primary pastoral functions:

1) "Proclaimer of the Gospel and teacher of the faith,"
2) "Provider and presider of the Sacraments,"
3) "Bishop as leader in the Councils of the Church, local, national and supra-national." (Trinity Institute, 1991, p. vii)

Diocesan discernment profiles and consecration vows frequently reference these aspirational

aspects of episcopacy. The more practical elements of episcopacy, including team

development, strategic visioning, budgeting, and grappling with long-term adaptive challenges,

are glossed over in the more public venues of consecration and discernment documents.

When a bishop calls for the search process for his or her successor to begin, there is a

regional discernment process that occurs before the posting goes public. Once the diocese

elects a bishop, there is a transition for the communities and the individual involved. The

formation program, *Living Our Vows*, provided by the College for Bishops begins each summer

with a five-day residency. The primary purpose of *Living Our Vows* is to prepare new bishops

with the skills and support they need to succeed. However, what has become clear, even with

this support, some bishops struggle to make the transition and feel ill-equipped to meet some

challenges. New bishops are learning on the job for many aspects of their work, and the

learning curve can be steep.

Complicating this picture is the current uncertainty and concern about the decline in the

number of people who identify with a church. The phenomenon has been felt in the Episcopal

Church and has added another pressing dimension to the diverse roles a bishop must play. The

uncertainty is so widespread that the board of trustees has determined that the College needs

to provide continuing education for experienced bishops.

Against this backdrop, it is important to note that transition to executive leadership

happens in all kinds of organizations, and there is a significant body of research to inform the

transition process. There are two streams of research in leadership development. The

traditional model views leadership transition as a process of learning new skills, whether on-

the-job or through formal training programs. The other is more recent and quite different from the learner-as-empty-bucket model. It focuses on the identity transition experienced by new leaders learning the role behaviors required of their position and incorporating them into their *identity narrative*. Leaders in this framework engage in narrative identity work, as their personal narratives are tested in episodes that are bracketed in experience, and by observing the reactions of others to experiments, new leaders add to that narrative identity.

Despite the divide between the ecclesial and the secular arenas, there are similarities between the roles of bishops and business leaders. Bishops and C-suite leaders require the capability to inspire, gain loyalty and trust, and cast a shared vision with goals. There can also be a significant difference between the leaders' work and what they must do when being promoted to C-suite or diocesan episcopate leadership, respectively. Ibarra (2015) asserts a shift in mindset and skills used when moving into executive leadership, going from technical and management knowledge towards visioning and bridging (p. 36).

Becoming a leader does not happen in a single transition or event; instead, it unfolds over time and with a series of events and experiences integrated and internalized into a *narrative identity as leader*. It is the personal transformation toward a narrative that includes the commonly understood identifiers of leadership, this individual's experiences of that transformation then confirm or disconfirm and transition to the leader identity. The heart of this process is called narrative identity work (Ibarra & Barbulescu, 2010)—the process the individual engages in to *become* a leader. This identity transformation process emerges as a coherent narrative over time as someone learns, practices, and receives feedback on his or her behaviors (Ibarra & Barbulescu, 2010).

Becoming an agile executive leader is required in both the secular and faith-based organization context. With a transition into a new episcopate, there is a required rapid shift in identity and presumed skills. A range of social and personal skills is required, and these become more demanding with the shift to bishop. These personal and social skills come to be embedded in identity narratives as new bishops practice and receive feedback on their actions. The College for Bishops' participants and faculty have created a safe space where this narrative identity work and skill-building can occur for new bishops. I am partnering with the College for Bishops so that the board, staff, and faculty can have data on narrative identity changes for future-focused bishop development. This capstone will help the curriculum, coaching, and conversations to be informed by these interviews and findings to equip new bishops better as they encounter their new executive leadership roles and responsibilities. This project may also help to inform colleague cohort groups and personal development plans.

The College for Bishops

Since 1993, the Episcopal Church's College for Bishops has offered a learning program for newly elected bishops for regional church-based structures. Approaching its third decade of leadership formation, the College has had the opportunity to reflect on its past, note its strengths, and focus on a path forward to create strong executive leaders in the episcopate.

The College for Bishops includes an invested faculty, a board of trustees, an administrator, and a managing director. The College focuses on creating an active, collegial learning environment and opportunities specifically for the unique challenges found within executive leadership roles in the church. While the College is an official Episcopal entity, it is separate from the churchwide staffing structure, but its mandate can be found in the Constitution and Canons of The Episcopal Church:

> Following election and continuing for three years following ordination, new Bishops shall pursue the process of formation authorized by the House of Bishops. This process of formation shall provide a mentor for each newly ordained Bishop. (Title III, Canon 12, Section 1)

The College for Bishops' educational community is small yet influential within the church and its constituents. The total number of bishops involved is about 300 active, resigned, and retired bishops, mirroring the governing and colleague body, the Episcopal Church's House of Bishops. As bishops are elected, they must learn the new role and learn how it differs in scope, focus, and duties from their work in the priesthood. In recent years, bishops from non-Episcopal Church dioceses have requested to join the learning community. They are welcomed to the three-year new bishop program and most other continuing education and informational offerings.

The College for Bishops addresses the new bishop role and relevant needs with a three-year cohort-based program called *Living Our Vows*. The 20-year-old *Living Our Vows* program has relied on three five-day in-person residencies over the three-year curriculum arc. Over the past two years of pandemic closures, lockdown, and quarantine, the *Living Our Vows* experience has shifted to online synchronous meetings and a Moodle online learning platform for resources and asynchronous reflections.

The College for Bishops reaches about 300 bishops total—including United States and international-based, active, resigned, and retired bishops. There is also a program for bishop spouses as they support their partner transitioning into the new call and job description. The final formal offering for bishops is the Conference on Orderly Transitions, which helps the attending bishops envision what is next after they resign or retire.

With the 2021 strategic visioning process, the College's Board enthusiastically agreed to expand the focus to provide a continuous learning experience for the unique circumstances found within the episcopacy. Covering the entire trajectory of episcopate ministry, it will provide more opportunities for conversation, gathering, and learning beyond the three-year introductory curriculum. It will also give the College ways to respond to emerging community needs in a timely manner and expand the audience to include all bishops. The College as a continuous learning destination for bishops also provides the church leadership connection to Episcopal context and culture while delivering the conversations and learnings that have appeared well after the three-year program.

The newly created online "salon" format has addressed this need, bringing learning opportunities when in-person gathering was impossible during the pandemic. Over the past

two years, these online "salons" created a dedicated space for all bishops to come together for learning, reflection, and discussion with their colleagues spread throughout the world. These salons have focused on the most pressing topics, most of which have not been primary concerns of church executive leadership. Salons have also accommodated bishops when they needed to quickly engage in conversations with their peers to unpack the theological and practical elements of specific situations. Topics have included the theology behind Lent during pandemic and an overview of Episcopal-ecumenical partnerships.

There are a few ways to aid bishops as they experience what can be described as the culture shock associated with their new roles and to prepare future bishops by expanding the leadership skills called for in their new positions. After a majority of election endorsements have been received, the College for Bishops gives the newly confirmed bishop a 100-day guide, who helps with the sometimes-rocky transition into a regional oversight role. As described by the College's managing director, Bishop Gray-Reeves, the guide is to support the change, typically involving saying goodbye to one community, moving, and then entering an entirely new system as the primary leader.

Since 2018, thirty-five bishops have been consecrated; three were international bishops and one suffragan. As of late Spring 2022, there is one consecration pending of an elected bishop, with all consents received. Another eight dioceses that are actively working on the discernment, nomination, and election process have called for the election or appointment of their successors in 2022 and 2023. There are also dioceses under transition oversight as they search out their next steps for their ecclesial leadership. Given that there are 109 dioceses in the Episcopal Church, to have turnover or change in leadership of approximately one third is a

high rate of change. This high rate provides the opportunity to welcome and form new bishops to the best practices and current thoughts on how to enter a new role adeptly.

Like any transition into executive leadership, there is a gap in skill sets, knowledge, and expectations facing the individual going into the bishop seat. The result of these gaps is a learning curve frequently identified by managers moving from middle management to upper leadership. Research has described ways to make this transition from management to visioning easier. Coaching and mentorship are frequently cited as successful ways to aid in job transitions. But the shift also can be made smoother by sharing and noting pivotal moments of identity formation and change. Recognizing leadership identity formation would make this episcopate transition easier for the elected bishops and, subsequently, their new diocese, as they grow into the executive leaders they are called to be.

With so much uncertainty in mainline Protestant denominations and the upheaval and unknown lingering effects of the COVID-19 pandemic, there is a more urgent need for new Episcopal bishops to transition quickly and successfully into their executive roles. In its next phase of ministry, the College for Bishops is ready to address this identity adoption gap with the College's proven track record of providing education and formation opportunities.

Problem of Practice

The College for Bishops' *Living Our Vows* program introduces episcopate development and formation topics within the three-year curriculum. Still, the learning can come too late for bishops to integrate it into their new ministry's early stages. From the moment they are elected, bishops face situations and decisions for which they are unprepared. Participants speak highly of *Living Our Vows*, but they note that sometimes the information comes too late for new bishops during the summer residency after the election.

As documented in decades of executive leadership development research, there is a 50% failure rate within the first eighteen months when new leaders shift to a higher level of management and vision (Carucci & Hansen, 2014, p. 1). Within the episcopate, this transition is also potentially marked by a significant exploration of a new identity, representing an opportunity to examine that process of personal change between cleric and bishop. Unlike Fortune 500 companies, there is not a clear demarcation of failure or success when it comes to new bishops and their shift in roles. In the executive leaders surveyed, two-thirds of them indicated a lack of understanding of the role and its responsibilities and their new purview (Carucci & Hansen, 2014, p. 1). Similar to the findings of executives, those that are elected to be bishops do not have sufficient understanding of their new ministry and the shift in identity.

Anecdotally, the first three years of a new episcopacy are marked by tough transitions. These transitions include the grief of leaving a beloved congregation and community connections. New roles and responsibilities are also a part of the unknown path of election, post-consecration, and starting new ministry leadership.

At the same time, faith communities are facing overall uncertainty in their future. Currently, the College for Bishops is facing the issue of more quickly onboarding and aiding in the identity transition of new bishops. Having regional leaders who quickly shift into their new identity as bishop will allow for more rapid response to change. If new bishops more adeptly shift into their roles, it can positively impact their entire episcopacy term.

Unfortunately, there is a hesitance to allow the leadership best practices established in the secular arena into the sacred space. Many theologians and church leaders have decried the phenomenon of bishops shifting into the management sphere, indicating that bishops are called to be disciples, pastors, and teachers, not executive managers (Norris, 2009; Percy, 2014; Whalon, 2017). Bishops ideally called to their role, not because of their management understanding but by the Holy Spirit-guided election process, face an uphill battle as they transition into a position with no guidebooks or executive pipeline.

The College for Bishops, *Living Our Vows*, faculty, and participants are ready to learn from the rocky episcopate transitions. From this project, the College will be able to understand the identity work experienced by bishops and more intentionally embed leadership identity work in *Living Our Vows* and the mentorship program. Bishops more quickly adapting their episcopate identity and transitioning into their leadership role can be expected to positively impact the health of dioceses and the wider Episcopal Church.

Literature Review

The Episcopal Church and its governance structure rely on bishops for the confirmation of new members, ordination of ordained peoples, and provision of the regional oversight needed to be a church integrated through regions and churchwide systems. Recent research in leadership development has demonstrated that leader and leadership identity is essential to any organization because the critical qualities found within the executive leader are not generic abilities and experiences, but rather experienced, but rather abilities and knowledge are acquired through experience and incorporate in unique ways by the individual within their self-narratives and leadership context. These new self-narratives are often triggered by work role transitions. The successful identity shift of a new executive or bishop can be understood from stories told about the evolution of self-embedded stories told. The increased awareness around how a diocesan bishop crafts his or her personal narrative repertoire and, subsequently, how that carried knowledge impacts long-term institutional success and role adoption may be key to identifying ways to accelerate learning of the new leadership identity (Ibarra & Barbulescu, 2010).

Role of a Bishop

Much discussed and debated are the roles of a bishop as of theologian, pastor, and administrative leader. As a mainline Protestant Christian denomination, the Episcopal Church is one of hierarchy and clericalism, traditionally poised next to wealth and power within politics and the economy of the United States (Lipka, 2018). At the top of this hierarchy is the role of

the bishop, a regional-elected leader. Indeed, the word *episcopal* comes from a derivation of "the Greek *episcopos*, meaning 'overseer'" (The Episcopal Church, 2000). Thus, the very root of the Episcopal Church is an organization based on having bishops at the top of the governing structure.

In the Episcopal Church's Catechism, the official description of a bishop is:

The ministry of a bishop is to represent Christ and his Church, particularly as apostle, chief priest, and pastor of a diocese; to guard the faith, unity, and discipline of the whole Church; to proclaim the Word of God; to act in Christ's name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ's ministry. (The Episcopal Church, 1979, p. 855)

This aspirational understanding of the ministry role does not fully capture what the new executive leader steps into after the validation of his or her election. This disconnect between the job description versus actual responsibilities is found on multiple levels of ordained ministry.

Hoge identified six practitioner roles pastors have as part of their ministry: preacher, pastor, teacher, priest, administrator, and organizer (2006, p. 373). Among the same pastors in the study, a majority stated that they wanted their work-life to include mainly the work of a "pastor, preacher, and teacher, but found themselves forced to spend their time and energy being administrator, pastor, and organizer" (Hoge, 2006, p.374). This identity shift realization of what the job is perceived as rather than the actual reality is part of the steep learning curve.

This tension of living into an unknown pastoral ministry carries over from the priestly ministry to that of a bishop. The Rt. Rev. Pierre Whalon (2019) addresses this issue with humility, indicating that if bishop remembers "that the greatest must be servant of all, and act upon that, the exercise of episcopal ministry will continue to build up the Church as we are all

drawn by, and move ever closer to, Jesus Christ" (p. 524). The practical tension of running a

large organization and being pastor to congregations and their leaders, while also being

"disciples … to remind everyone that discipleship issues in service and proclamation" (Norris,

2009, p. 61) is daunting. This humility and servant leadership is based not on the executive

leadership track but God-led discernment. Many believe that the bishop's primary role is one

of teacher and disciple, not of administrator, organizational leader, or manager. The

exploration of the bishop identity is one that challenges the individual's personal perceptions of

and expectations for the role. This occurs while the individual is also simultaneously adopting a

personal association with being a bishop and crafting an outward identification of the

institutional expectations.

Leadership Development

A review of the literature on new leaders reveals a documented steep and long learning

curve tied to the expanded scope of work. New executive leaders in the secular space have a

failure rate of 50–60% within eighteen months of being promoted or hired (Carucci, 2017). This

high failure rate comes with the realization that those being promoted or hired are not

prepared for the increase of responsibility when shifting from the previous position and/or

company to an executive leadership role. "Most executives fail because they are unprepared

for the job. It may be their own misunderstanding of the expectations of their position, or a

failure of their organization" (Carucci & Hansen, 2014, p. 3).

Successful managers and leaders need to be aware of their desire to grow and change

(Kaplan et al., 1987, p. 203). This self-identification leads to increased awareness of the

moments where the growth and change need to happen, a recognized opportunity for self-redirection (Kaplan et al., 1987, p. 203). As leaders encounter their own personal growth, they are also consistently confronted with the difficulty of external skills and tools that are perceived to be the "best" method. The Center for Creative Leadership (CCL) collectively gathered information on the skill gaps that 21st-century organization leaders need to close to be successful compared to their previous counterparts. To prepare for a successful future, executives need to develop the following skill sets: leading employees, strategic planning, inspiring commitment, change management, employee development, and self-awareness (Wilcox & Rush, 2004).

Traditional leadership development has focused on building leadership skills. These discrete and readily understood concepts gave goals for new leaders to work towards. The more recent leadership development trend, on the other hand, has recognized and focused on the complex interactions between organizational context and individual circumstances (Day, 2000). According to this approach, context impacts how leaders transition and bring their own experience into their designated roles. In the traditional approach, there has been a focus on finding the "right" theory and training for leadership development. Day et al. (2014) point to training as a short-term approach (p. 64) to aiding in a role transition. Shifting focus from the skill-based training towards other leadership development methods is critical to address the complex systems and problems (Day et al., 2014, p. 64).

Much like the tensions felt by those who hold dual roles as managerial and medical staff members (Spehar et al., 2015), bishops also live and work in two different worlds. These separate worlds involve visiting and being actively engaged with parishes in their struggles and

successes while also shaping a diocesan landscape and creating the infrastructure surrounding these parochial-supporting ministries. As indicated in Ibarra (2015), context and personal influences impact the role adoption and identification process. These foundational expectations impact the exploration of identity and the new role. How can a bishop, who is frequently distanced from his or her pastoral charges and other supervisees, learn from these experiences and better adopt a unique leadership identity?

Identity and Leadership

Identity and leadership have come together as a more active research field in leadership theory to address the complicated nature of individual effectiveness in-role. Individuals' perception of themselves impacts how they lead an organization, which is often defined by moving toward a common goal or vision (van Knippenberg et al., 2004, p. 826). Ibarra's research indicates that it is in the process of experiencing change that self-knowledge increases (2015, pp. 2–3). In experience, actions affect the mindset and identity of someone in a new leadership role (Ibarra, 2015, p. 3).

Identity work is defined by Ibarra (2015, p. 145) as all factors that "form, maintain, or revise" the sense of who we are. This work is done through our personal changes in identity from experience, but also from the responses of others to our actions. Identity results from the interplay of our reflection on our actions in conjunction with our observations of how others react to our actions. The importance of both individual construction of identity and relational construction of identity cannot be underestimated (van Knippenberg et al., 2004, p. 830).

Much of this construction comes from how leaders think of themselves as a part of the larger whole and then how the community views itself in relation to the executive.

An essential aspect of leadership is how the leader communicates vision in a way that reflects the needs and characteristics of the group that he or she leads (van Knippenberg et al., 2004, p. 841). Essential to that process is the newly placed leader's ability to create trust and establish rapport. A leader must create a narrative for the group that integrates the new vision with the organization's existing narrative. A new vision will not be accepted without a grounding in the group's past and such grounding is critical for the next steps of the shared vision to unfold (Auvinen et al., 2013, p. 500). New bishops often grapple with absorbing the new landscape as they try to bring their own identities and visions into the diocese. The experience in those early days is an interplay between the new bishop's work toward the leader identity and the group's response to it. It is an ongoing process of individual and relational construction.

The larger external community and a broader oversight are places where new leaders witness the difference from their previous roles and increased management and obligations. Identifying a new set of practices and actions in response to this new environment could mean abandoning the previously relied on skills for a more extensive systems-thinking approach (Ibarra, 2015, p.160-161). New bishops who cling to their "old" skill sets can be thought of as experiencing the "competency trap." They may not be willing to let go of the specific qualities and skills that made them successful clergy and enabled them to become bishops. To make a successful identity transition, a new leader needs not only to engage in actions that build on

prior competencies but also in leadership actions that tap previously unexplored competencies demanded by the new role (Ibarra, 2015, pp. 160–161).

It is the process of adopting the new leader identity where the identity work must occur, but it also produces an unknown, transformative outcome. It is an active process of constant "becoming" rather than a static one in which the new leader remains a passive bucket into which skills are poured. As they are learning the assumptions about their role and duties, new leaders are, at the same time, customizing the job to align with their unique strengths and the shared outward vision. Each leader, as a result, will go through the same process of becoming, but each will experience it in different ways. It is the unique combination of bishop and diocese that is key to understanding this unfolding individual narrative and role personalization.

Church Leadership Development

Those identified for ordained leadership within the Episcopal Church go through a discernment process that identifies their readiness to be a pastor in the larger context that raised them up for holy orders. Beyond this personal and group discernment, there is little to no attention focused on leadership traits and qualities that are beyond the typical ordained training of teaching, liturgics, and pastoral care (Bolsinger, 2019, p. 13). Most priests face a steep learning curve when placed into any type of leadership. Their preliminary learned experience and legitimate power are not enough to help them grapple with the need to achieve a more relational authority that connects leader to followers in personal and inspirational ways as well as to serve as systemic change instigators and visionaries.

In their traditional three- or four-year programs, seminary students do not undergo real-life exposure to congregational life and ministry (Carroll & McMillan, 2006, p. 229). Consequently, some seminarians can leave the vocational program with minimal context of what it means to be a pastoral leader, much like Hoge's disillusionment between how pastors perceive their roles compared to how they spend their time (2006). Carroll and McMillian assert that a combination of "typical" seminary education and congregational apprenticeship is a path forward to train future clerical leaders for scriptural reflection and operational leadership. This dual vocational training addresses the desire for learned clergy and leaders who can navigate the complicated congregational and organizational structures (Carroll & McMillan, 2006, p. 231).

The leadership role identity of a pastoral leader is frequently left out of traditional training programs. As new priests and new bishops assume their roles, they actively imitate their own mentors or do the opposite of those that they perceive as bad role models. Each "step" into a new leadership role, whether a solo rector, diocesan position, or bishop, includes external expectations and personal understandings that do not always match up. To grapple with the shift, new leaders frequently imitate their mentors or role models which enables them to begin experimenting with the new identity (Ibarra, 1999, p. 776). The identity that they are "trying on" slowly evolves with the individual's own experiences, the individual's reflection, and external feedback (Ibarra, 1999, pp. 779–782). Rather than a checklist of skills, this more organic adoption of role identity gives importance to the contextual realities and personal experiences.

McKenna et al. also assert that situational leadership training needs to be embedded within the traditional formation program while supporting ongoing pastoral leadership development through providing mentorship opportunities and informal opportunities (2007, pp. 187–188). Supporting the successes found within apprenticeship programs and building on the mindset shifts needed to go up within executive leadership, there are identified moments of growth within on-the-job experiences, during transitions, and in relationships (McKenna et al., 2007, p. 187). McKenna's research mirrors Ibarra's provisional selves framing of role transitions (1999) while emphasizing the importance of mentorship and apprenticeship for pastoral leaders.

Integrating Bishops' Role and Leadership Development

There is a paucity of research on leadership development related to the Episcopal Church and the episcopacy. Most writings and resources focus on change and leadership development occurring at the congregational level (see: *God's Potters* by Carroll & McMillan, 2006; *Practical Theology* by Osmer, 2008). A few research articles investigate the role of a bishop, but only a handful focus on the Episcopal Church and its hierarchical structure.

Moreover, because the search, nomination, and episcopate oversight varies between Catholic and mainline Protestant denominations, there is no direct correlation between the processes and authorities discussed in the available research.   Within Episcopal Church spheres, there is an argument against cultivating executive leadership. For those who feel that one is called to be a bishop, there is a fear that such training may create "a sense of subduing the work of the Spirit" (Percy, 2014, p. 267). As argued by multiple theologians, writers, and

bishops, to have that level of preparation and identification would dispel the holy spirit of

discernment from the process of selecting and electing bishops. Percy also calls on the Church

of England, the mother of the Episcopal Church, to examine its newly "management-led"

process of calling bishops to create consistency and compliance, which subordinates the

needed theological leadership with which bishops are tasked (2014, pp. 263–4).

In 1991, the House of Bishops called for a study on the ministry of bishops. The House

authorized three scholars to trace the roots of the ministry and examine the episcopate and its

realities in the late 20th century (Trinity Institute, 1991, p. v). This thirty-year-old work

documents both the historical viewpoint and trajectory, an oversight position that has gotten

more complicated in the recent decades. The succinct description of a bishop's role is one that

"unites the diocese within itself and to the whole Church, both articulating the vision and

making sure that it happens, gathering the people of God and then dispatching them" (Trinity

Institute, 1991, p. 29). Bishops are compared to a "first citizen," being brought up from the

people and within the community rather than the corporate leader role (Trinity Institute, 1991,

p. 30).

The Rt. Rev. Sean Rowe, Ph.D., the current bishop diocesan of Northwest Pennsylvania

and provisional bishop of Western New York, completed his 2018 dissertation research on

adaptive performance amongst Episcopal bishops. In his research, Rowe asks whether

Episcopal bishops become more or less open to adaptive change the longer they are in their

episcopate role and how adaptive performance can positively impact navigating complex

systems (2018). The quantitative research points to the fact that church-based leadership

formation is built on an old model of traditional career development and is not focused on the

current realities of church and business (Rowe, 2018). In the five years since Rowe's research, a significant turnover in the House of Bishops colleague group has occurred due to retirements and resignations, adding more Generation-X bishops into the House. The College for Bishops also continues to modify the *Living Our Vows* curriculum and continuing education offerings that address the current realities and challenges.

Although there is little to no research around the forming episcopate identity and future leadership development within the mainline Protestant denomination of the Episcopal Church, there is more research on the topic related to the Catholic Church and other denominations. In a small survey, Dr. Torrence Sparkman documented conversations with eight bishops in an African American denomination and how their leadership development occurred with similar experiences and opportunities (2017). In his research, Sparkman indicates that the identity role between a smaller congregation and a larger one is vastly different; the same can be said for the larger church and the regional episcopate (2017, p. 57). With this clarification that identity transitions occur within the different spheres of ministry leadership, there is a potential for bishop-focused leadership development to fully prepare future bishops as they are launched into a new regional role.

A new book, *Episcopate: The Role of Bishops in a Shared Future,* edited by C. Andrew Doyle, current bishop diocesan of Texas, will be published in May 2022. The compilation work asked bishops and others to consider the future role of leadership in the wider church. When published, these essays will offer an interesting comparison to this research.

Conceptual Framework

Ibarra's theory on provisional selves delineated in "Provisional Selves: Experimenting with Image and Identity in Professional Adaptation" (1999) helped shape this project's research arc. Ibarra's framework, based on her research held at an investment bank and management consulting firm, describes how people adapt to new roles as they "try on" different personas, test them by observing and reflecting on the reactions of others, and finalize their new leader identity. The literature review themes consistently pointed towards the importance of personalizing the role and role adoption process. Rather than focusing on the traditional method of leadership skills development, the provisional selves and narrative exploration approach values the iterative and expansive identity adoption process. This provisional selves conceptual framework, which shaped the research and analysis of the bishop interviews and narratives presented in this paper, is illustrated in *Figure 1: Provisional Selves Conceptual Framework,* found on the next page.

Figure 1:

Provisional Selves Conceptual Framework

Provisional Selves Conceptual Framework (Ibarra, 1999)
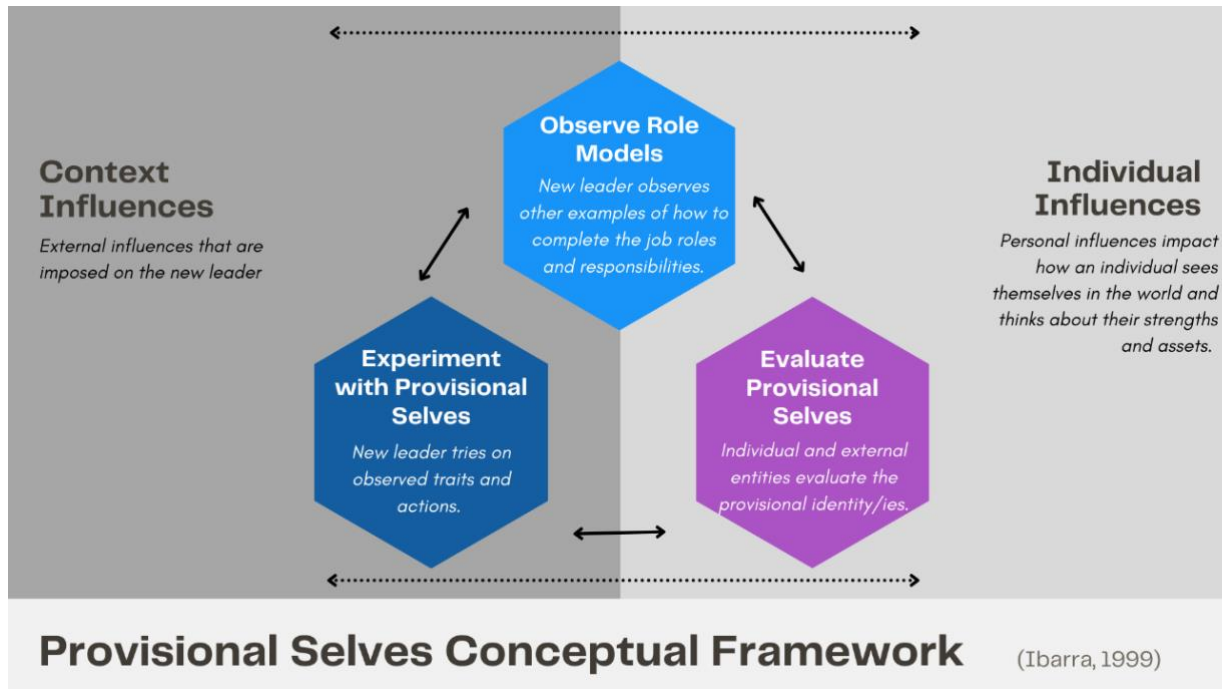
Provisional selves research describes the exploration, adaptation, and adoption of an identity based on a new role in a professional context (Ibarra, 1999, p. 764). In the background of these individual identity exploration efforts is the interfacing of the contextual and individual influences, as represented by the two gray boxes in *Figure 1: Provisional Selves Conceptual Framework*. The context can include the regional, organizational, or cultural understandings about the job role and how the new leader fits into that constellation of expectations. This wider view greatly influences the leadership transition in ways the new leader might not be aware of because the assumptions of the external communities are often unspoken. The new leader, in this case, a bishop, needs to weigh the context influences and expectations while he or she brings his or her own personal influences into the new episcopate. In the background of

the identity exploration, the individual influences are in conversation with the context

influences. These individual influences can include personal experience, viewpoint, and

motives. Many times, diocesan bishops are chosen because their approach to ministry is

different from that of their predecessor. This tension can be found as the individual and

context influences interact. The expectations of the external community still references the

predecessor, while new bishop comes in with their own ideas and approaches to their tenure

and authority. As new leaders incorporate themselves into the organizational structure, they

are bringing themselves and their own knowledge into the role. Thus, the two strong

influences of context and individual are in conversation with each other as new leaders

approach the provisional selves exploration process.

The observation, experimentation, and evaluation of identities are occurring while the

context and individual influences are interacting with each other. This identity exploration and

evolution process consists of a three-step cycle, represented by the three colored hexagons

depicted earlier in the *Figure 1: Provisional Selves Conceptual Framework.* The adaptation

process includes:

- o Observe Role Models: New leader observes other examples of how to complete the job roles and responsibilities.
- o Experiment with Provisional Selves: New leader tries on observed traits and actions found in the role model.
- o Evaluate Provisional Selves: Individual and external entities evaluate the provisional identity/ies.

These three steps interface with each other as the new bishop attempts to step into his or her

new role. Ibarra details that the observation of role models includes identifying a potential role

model whose actions as bishop the new leader will study, while he or she also observes the role

model's presence and how that individual synthesizes information overall and approaches the job and its pressures (1999, p. 774). As a part of the observation process, prototyping also occurs. The new leader matches the successful role model's performance with the job role itself (p. 774). Identity matching is the final subset of observation. In identity matching, new leaders find the similarities between their own abilities and identity and those of the observed role model (p. 775).

New leaders then take these observations to begin applying the behaviors to their own leadership contexts. As they imitate these new identities, they are trying on new characteristics and actions. Most new leaders begin by fully imitating their role models and their observed behavior, "trying on" the new role and its various decisions. As they become more comfortable with their new professional identity, new leaders then shift to partial or selective imitation, followed by a transformation to being true-to-self (Ibarra, 1999, p. 777). Authenticity is a core value in the true-to-self experimentation subtheme, leaning towards the new leader being transparent in his or her actual abilities and feelings (p. 778).

The third part of the identity evolution process is the evaluation of the provisional selves and role. The evaluation can be an internal or external assessment, either informal or formal. As part of internal assessments, new leaders compare their personal knowledge of self to their job performance in the new role (Ibarra, 1999, p. 779). In contrast, external assessment is conducted by those who interact with the new leader, providing an outside view and reactions in terms of their understanding of the role and how the new leader is adapting to it (p. 779). This iterative evolution process of observation, experimentation, and evaluation is ongoing.

All the conceptual framework major themes and concepts can be found in *Table 1: Provisional Selves Conceptual Framework Major Themes and Concepts.*

Table 1:

Provisional Selves Conceptual Framework Major Themes and Concepts

Conceptual Framework Major Theme	Concept
Role Model Observation	Role model selection
	Studying
	Observation
	Prototyping
	Identity matching
Experiment with Provisional Selves	Imitation
	Selective imitation
	True-to-self
	Authenticity
Evaluate Provisional Selves	Internal assessment
	External assessment
Context Influences	Job role
	Diocesan expectations
Personal Influences	Past experiences
	Self-reflection

These framework ideas were used to construct the interviews and the narrative responses of bishop participants. As indicated by Ibarra's research and framework, this process of identity adaptation, exploration, and learning can help prepare leaders to mold their role and their performance in it more adeptly using their particular strengths in unique ways within their new environments.

Research Questions

Understanding the transition from pastor to bishop and new executive is the driver behind this research. To achieve this understanding, to the research began with a survey of the available leadership identity literature and then interviews were conducted with bishops in different phases of ministry. Using Ibarra's (1999) provisional selves conceptual framework from the leadership identity literature, I assembled the bishops' responses to create a narrative describing how the bishops adopted their episcopate and leadership identities throughout their tenure. The following questions guided the capstone project:

- How have the bishops come to identify themselves as executive leaders? How has that identity emerged over time?
- How do the sources of authority—canonical, ecclesial, and relational—play a part in the development of their identity?
- What are the experiences of priests making the transition from cleric roles to leadership roles?
- How do the different phases of a career in the clergy contribute to the leadership identity?

The findings from this research provide data for the College for Bishops to add new and different learning opportunities to *Living Our Vows* and other programming. Giving new bishops the tools and language to recognize key transition points will potentially expedite their transition to the new role and enable them to become more effective leaders.

Project Design

Data Collection

To collect data, I employed a qualitative approach using interviews to capture the key experiences and events leaders have faced as an unfolding narrative of the leadership transition process. To ensure a representative sample, I used publicly available data on birth years, United States diocesan geography and size, election and consecration years, and gender and sexual identity. With that information, I grouped all current bishops by ministry year distribution and listed their diocese, Episcopal Province, year consecrated, and birthyear. I also assigned them a generation designation (Silent, Baby Boomer, X, or Millennial). The episcopate ministry designation brackets were created based on a few milestones. The first milestone was completing the *Living Our Vows* program at year three of episcopacy. The second milestone was the traditional sabbatical timing at year seven of episcopacy. Based on these two milestones, the bracketed tenure designations were then created.

I also had access to earlier qualitative and quantitative survey responses conducted in reference to the College for Bishops' 2020 strategic planning process. These existing documents helped to provide a mid-pandemic context for the bishops' questions and continuing education need requests to the College. Conducted in Winter 2020, this strategic plan survey requested feedback on the formation curriculum and subsequently identified gaps that have impacted their ministry. Responses to this qualitative and quantitative survey indicated the leadership and mindset difficulties that current and retired bishops experienced

within their time since election. This survey further helped to formalize anecdotal evidence that bishops have struggled with transitioning into their new role.

Participants

One-on-one interviews were used to survey bishops in different phases of their episcopate. Potential interviewees were identified in advance to ensure a wide range of diocesan sizes, geography, gender, sexual identity, and racial/ethnic backgrounds was represented. Using their publicly available email addresses, I sent interview requests to the potential interviewees. The email request included the context of my research, the IRB information, the purpose of the study, and the opportunity to schedule with me via electronic calendar link. See *Appendix A: Email Invitation* for the initial email request for an interview.

In total, I sent twenty-seven interview requests via email. Seven bishops declined or did not respond to the email. When those declines arrived, I requested interviews with other bishops who represented the same experience years bracket and the other listed demographic factors. The twenty interviewees' ministry years and anonymized demographic data can be found in *Table 2: Interviewee Episcopate Tenure Distribution*, below, and *Table 3: Interviewee Anonymized Data,* next page.

Table 2:

Interviewee Episcopate Tenure Distribution

Newly elected and consecrated	1–4 years of ministry	4–7 years of ministry	7–10 years of ministry	Over 10 years of ministry
2	4	5	4	5

Table 3:

Interviewee Anonymized Data

Interviewee Label	Gender	Episcopate Tenure
A	F	1–4 years
B	F	<1 year
C	M	1–4 years
D	F	1–4 years
E	F	1–4 years
F	M	<1 year
G	M	4–7 years
H	F	4–7 years
I	F	4–7 years
J	M	4–7 years
K	F	4-7 years
L	F	7–10 years
M	M	7–10 years
N	M	7–10 years
O	M	7–10 years
P	M	10+ years
Q	M	10+ years
R	M	10+ years
S	M	10+ years
T	M	10+ years

Conducting Interviews

This project consisted of twenty interviews, nineteen via Zoom and one in-person. The interviews were scheduled between August and December 2021, depending on the bishop's availability. When the interview started, I restated my purpose and how I intended to use and distribute the information and ensure confidentiality. I also obtained permission to record the interview for documentation and transcription. See *Appendix B: Interview Introduction* for this introductory text.

These interviews provided the bishops an opportunity to share a personalized narrative and anecdotes associated with their learnings and the arc of their experience. Each interview was approximately 35–80 minutes, focusing on the twenty personal reports of how each bishop spoke to his or her learning curve, personal narrative, and what each wished he or she had known as a new executive leader. See *Appendix C: Research Questions and Interview Questions Grid* for the research question and interview question associations. See *Appendix D: Interview Questions and Episcopate Ministry Tenure* for the complete list of questions separated by episcopate ministry tenure.

After asking the appropriate questions, I opened the interview up for any other stories or questions that I should have asked that were relevant to the interviewees' experience. I offered that my email inbox was open for any other responses or follow-ups after our Zoom or in-person meeting ended. Finally, I thanked the interviewees for their willingness to participate and their openness in their responses. The interviewees were also sent a thank-you note via U.S. mail.

The Zoom application recorded each interview in video and audio for those interviews that occurred online. The one in-person interview was recorded via Apple Audio Notes Desktop and iPhone app. All audio recordings were then brought into Otter.ai for automatic transcript generation. After initial transcription was complete, I edited the documents for clarity, homonyms, sentence structure, and church-based vocabulary. I used the audio recordings to review and clarify segments of the transcribed interviews that contained complicated responses or misinterpretation by the transcription program.

Data Analysis

The interview questions were structured according to how many years the bishop had been in his or her episcopate. See *Appendix D: Interview Questions and Episcopate Ministry Tenure* for the breakdown of episcopate years and questions asked. The list of questions was important to guide the interview conversation and have comparable responses from each interviewee.

Table 4: Research Questions Connected to Interview Questions and Conceptual Framework, below, describes how the interview questions are related to the research objectives and the conceptual framework.

Table 4:

Research Questions Connected to Interview Questions and Conceptual Framework

Research Question	Interview Questions	Conceptual Framework
How have the bishops come to identify themselves as executive leaders? How has that identity emerged over time?	What do you identify as your leadership strengths from your previous ministry background [diocesan work, parish, etc.]?	Individual Influences
	What do you identify as your leadership strengths as a bishop?	Individual Influences
	What skills have you developed since becoming a bishop [x] years ago?	Individual Influences
How do the sources of authority—canonical, ecclesial, and relational—play a part in the development of their identity?	Share an experience where you recognized your authority and leadership as a bishop.	Evaluation of Provisional Selves
	Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role.	Experimenting with Provisional Selves

What are the experiences of priests making the transition from cleric roles to leadership roles?	Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy.	Individual Influences
	Tell me about your transition into parish and then diocesan leadership.	Individual Influences
	What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads?	Context Influences
	Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries?	Role Model Observation
How do the different phases of a career in the clergy contribute to the leadership identity?	How have you come to identify with your role as bishop?	Evaluation of Provisional Selves
	What do you wish you had known or been taught earlier on in your episcopacy?	Evaluation of Provisional Selves
	Looking back on the past XX years, is there a pattern of seasons of ministry or identity formation that you can witness? What does that look like?	Evaluation of Provisional Selves
	In your [18 months] since your name was announced as a bishop nominee, what kind of mindset shift occurred between nomination, election, consecration, and then "on the job"? Had you anticipated these shifts?	Evaluation of Provisional Selves

I considered several applications to aid in coding the interviewees' responses. After some deliberation, I chose Dedoose based on its ability to be a data organization tool. There were over 15 hours of interviews to edit and then code.

The conceptual framework served as the basis for the thematic analysis. The first round of codes was created based on the conceptual framework: Individual Influences, Context Influences, Observation of Role Models, Experimentation of Provisional Selves, and Evaluation of Provisional Selves. *Table 5: Qualitative Coding Thematic Analysis,* which follows, shows the principal codes used throughout the analysis. During the coding process, I referred to Ibarra's

Provisional Selves: Experimenting with Image and Identity in Professional Adaptation (1999)

interview coding evidence to review the response nuances around specific themes.

Table 5:

Qualitative Coding Thematic Analysis

Qualitative Code	Code Definition	Code Example
Role model	Finding an exemplar to aspire to carry out the job as they did.	Bishop P: As a priest, their local bishop called during Holy Week: "'Hey, this your first year in this diocese, and it's Holy Week, and he said, that's a hard week… I'm just calling tell you, I'm thinking about you and praying, and I'm so glad you're here.' And I sat there and said, 'that's it?' 'Yeah, that's all just wanted to check in with you.' You know, to me, that was most impressive use of his time, of anything you'd ever done. And he was, you know, probably one of the most stellar bishops I had."
Studying	To intentionally take time to learn by studying a person in their role.	Bishop M: "Bishop S was a model for the Episcopal for his role as apostolic leadership… the missioners' role is very much apostolic. It's one of oversight. It's one of being a resource for folks. It was a continuous formation in my life and as a person that worked for the church."
Observation	Brief observation of actions and job role follow-through.	Bishop T: "But until I became Bishop, I was convinced that I knew exactly what a bishop did. Because I had witnessed it. I have had good bishops and not so good bishops for my entire career. And the moment was, in that transition, that unless you're doing the ministry of oversight, that is the bishop's you really have no idea... I did not appreciate some of the decisions [former bishop] made. And the truth is that parish clergy really don't know what the bishop is doing that enhances their ministries. There's really not a way to communicate that matter of fact, it's best that it not be communicated. The bishop shouldn't be getting a pat on the back for making sure that things go right. Because they're doing their job."
Prototyping	Noting others' role behavior and what makes them successful.	Bishop J: "The bishop that ordained me...smiled all the time and would come to your parish and preach not a very good sermon at all… But at some point he would say 'I am your bishop' [arms outstretched] like he was trying to give like a group hug. At first, I thought 'oh my gosh, what an egocentric guy or it's all about him.' And I realized like he meant that like, 'I'm your Bishop' and that's the greatest job in the church."

Identity matching	Comparing role models to personal behavior to see if the actions fit the individual.	Bishop B: "Well, have you heard that in [this diocese], there is a pendulum swing, you go from Bishop U from Bishop V, Bishop V to Bishop X, Bishop X to Bishop Y, Bishop Y to Bishop Z. … you could put those in two camps, it would be U, X and Z and then V and Y. People walked up to me and said, 'You are exactly what we need, because the pendulum is gonna swing back.'"
Imitation	Taking large observations and putting them into personal practice.	Bishop D: "I think something that would have been helpful would be to have a title for a mentor for bishops... But there were still a few steps that I think I would have done differently and better. If I had had someone helping me walk through the first time, you know, you're doing this the first time, you're doing that the first time, you're doing all these different things, I think that would have been helpful and would have caused possibly less pain, but probably not, for some of the people involved."
Selective imitation	Taking pieces of observations and putting them into practice.	Bishop O: "I mean, I knew how to be a parish priest after 10 years, you know, but this thing gets to racing at you, and all the people all the demands, etc. I think what really helped me was that you finally realize, once you get your second wind once you get a deep breath, right? I mean, the running analogy is a good one - you start off the race, maybe a mile or two, and you catch your breath. And then you can run on. When you realize that the episcopate is nothing more than a way to live out your baptism, it sort of takes a lot of the edge off, or at least it did for me. And so I don't have to be this thing, I just have to be O. And I happen to be baptized. And I happen to be trying to live up my baptism in this particular way. And so and so what's been crucial for me is consulting with people formally, informally, who have some miles on about this."
True-to-self	Carrying out job responsibilities in a way that mirrors personal truth and knowledge.	Bishop C: "When I look back, I had a brilliant mentor when I became a chaplain, and she taught me to be a priest. And then I went into the parish and I had a brilliant Rector who taught me how to be a rector. And then I worked for a bishop who was brilliant at teaching me how a diocese functions and runs. And he taught me to be a canon. And really, he taught me to be efficient. So when I became a bishop, there was never a room or a situation that I hadn't been in before multiple times. I mean, these people are new, this place is new, this budget is different. But I've been in all these rooms before. And sometimes in church like, 'oh, I remember you.' You had a different face. But I know the role you're playing in this meeting. Because I've dealt with this before. "

Authenticity	Being true to oneself and acting the same way.	Bishop N: "My staff would say, early on, we need to do things so that [N] can be [N], which means that knows things about social justice, things like that. And I would counter that with that I really wanted to empower them to be that, you know, that [R] can be [R], [P] can be [P]. So I think, your question is it sort of it's kind of an organic thing, that it's, it's not a role that you play. But it's also not all of you. You know, it's something you put on it. Would you bring your authentic self to it? That's, yeah, that's it. That's how I'd see it."
Internal assessment	Observing a change or act and then reflecting on it; positive or negative connotation.	Bishop I: "And to realize that I've got to know when my stuff is my stuff, and when the system is not reacting to me as a person, but to the change of the moment that we're in the midst, and not to take a risk, not to take everything personally. I don't have to hold all the things, I have to care about it, but I need to go to sleep at night. And so I get, you know, I think I sleep well, all things considered there were probably four or five fretful nights of sleep. And in my 4 years as Bishop, which I'm thinking is an awesome record. But that's, that's taken, like some conscious discipline, to be able to say, 'you know, I can't do all the things, I can't hold all the things I need to be able to lay down and to, because it's not like it's ever off my shoulders.' It's always there, but I can't be thinking about it all the time, all the time, all the time. So learning how to set some of those mental boundaries and to have other hobbies, which I've always had this ministry -- but I just had to learn that even as Bishop I can't be a functioning person if I'm only about the church and church's care 24/7. So learning how to do that as a bishop has been a thing."
External assessment	Others observe a change or act and then mention it; positive or negative connotation. Also, leader can observe a change in the external's behavior or attitude towards them.	Bishop A: ""Have you thought about running for Bishop?" That's their way of saying, you did an excellent job on that project. And I always just say thank you, because I know that's what they mean, you know, so I never took that very seriously…. And it took, I mean, I can't tell you the number of people that had to like sit down and say, "we think you should take this seriously in the year ahead of time." But even then, I wasn't discerning when they sat down with me."

Job Role	Individual's behavior towards the job responsibilities; attempting to conform or shifting the role to fit their strengths.	Bishop G: "And the last thing that I've discovered, is trying to find ways to teach. And that was one thing I did not mention in regards to the switch between parish and diocese. I love to teach. And, and so we have started a school for ministry. And I teach at [the school] – I teach the lay leaders for worship. And that's, that's, that's been a wonderful way for me to, to kind of stay enthused, so to speak."
Diocesan expectations	The regional community's expectations towards the job role and new leader.	Bishop H: "You know, it's complicated when you're not what people expect. And when I look at some people, people still think a bishop looks like [name redacted]. People still expect there's 'real' bishops and there's 'not real' bishops."
Past experiences	The new leader's experiences that influenced their current behavior or learned from that behavior.	Bishop L: "And I remember, reading in the profile is awesome profile, buried under all the things that told how important the [diocese] was, and how its new Bishop would need to do all these amazing things. Buried in the middle was this one sentence that that acknowledged that half of the congregations were in congregational decline. And that was not acceptable. And that the new Bishop would need to devote considerable energy to the renewal of congregations. And I thought to myself, 'well, if that's true, then I have a chance.' I remember when I came for the walkabouts, that's all I talked about. I just thought I'm going to talk about that every chance in every way I get. I'm also going to talk about how much I love to be a healthy leader and to encourage healthy leaders."
Self-Reflection	New leader's individual reflection on their current role and their own performance.	Bishop F: "However, identified with that, I, my style of leadership tends to be more flattened and collaborative. And I often recognize that my voice is not the only voice in the room. And so in many ways, I think I'm helping redefine what the expectations are, for the role of the bishop. So I try to add to the identity part is really difficult, because I am not sure if I'm fully there. But I think that the role, that when a bishop is called to be and do in this time in place, I think is very different than it would have been two or three years ago. When I said to the diocese, 'my job is to figure ways of saying yes to the things that you and God want to do. That doesn't mean I'm gonna say yes to everything.' But I would find a way of saying yes, to empowering people to be and do. And so I think the identity that I've taken on is much more being the chief inspiration officer for the diocese."

The individual codes were then brought together in themes found in Ibarra's (1999)

provisional selves conceptual framework, see Figure 1. I then wrote a brief definition and

meaning with these themes in place. These can be found in *Table 6: Qualitative Themes and Interpretation* below.

Table 6:

Qualitative Themes and Interpretation

Code Clusters	Themes	Definition of Theme	Meaning and Interpretation of theme
Role model selection, Studying, Observation, Prototyping, Identity matching	Role Model Observation	New leader observes other examples of how to complete the job roles and responsibilities. This observation also extends to attitudes and personality traits. The studying and observation then shift to the new leader comparing his or her own traits and actions of the role model previously studied.	Bishops spoke to how they had interacted with their previous bishops. Some mentioned positive memories of their interactions; others mentioned how they did not fully understand the various pressures associated with the role. Many spoke in appreciation of their predecessors and a current understanding of why and how they led the diocese. Many bishops did not have an official bishop mentor before entering the episcopate discernment process.
Imitation, Selective imitation, True-to-self, Authenticity	Experimenting with Provisional Selves	New leader tries on observed traits and actions. The degree of adoption varies depending on the individual – from full imitation to staying true to oneself only.	Bishops commented on their own learning curves and how they transitioned into the job. As they entered the new role, they observed others' behaviors and situations. They also brought their own experiences into the new job and changed the job based on their own strengths and understandings.
Internal assessment, External assessment	Evaluation of Provisional Selves	Individual and external entities evaluate the provisional identity/ies. This evaluation could be formal or informal. The provisional self and behavior then shift once again or are adopted.	As part of the provisional selves process, individuals reflect on their own experiences "trying on" personas and skills execution. External assessment is also a part of this concept. The bishops may experience the assessment as formal or informal feedback, change in behavior or attitude from external observers.

Job role, Diocesan expectations	Context Influences	External influences that are imposed on the new leader. This includes the job role and description that preceded the new bishop. The Diocesan expectations on how a bishop acts and what the bishop should do also contribute to the context and its influence.	Diocesan community expectations and assumptions are found when the bishop is elected. The bishop feels these expectations and influences in the decision-making process, presence, and questions asked of them. The context can also include the new bishop's previous experience in or knowledge of the diocese. The learning curve shaped by knowing or not knowing the diocese before becoming bishop greatly impacts the trust process and the perception of the new bishop by those in the diocese. Geography and other cultural factors can be context influences.
Past experiences, Self-reflection	Individual Influences	Personal influences impact how an individual sees himself or herself in the world and thinks about his or her strengths and assets.	Bishops' narratives on how they transitioned in and out of positions. Reflections on the patterns and how they learned from those experiences. Individual learning curves and how the individual continued to learn and interact with the new system.

Findings

Finding 1

Finding 1 referenced the difficulty an individual experienced in shifting into a new community and role context for which there is very little advance preparation and development. All the bishops interviewed referenced their difficulties getting comfortable in the job and with the diocese. Of the bishops with more than four years in their role, all indicated that the first three years of their episcopacy, externally, was a honeymoon period, when the bishop could "do no wrong" in the eyes of the diocese. But, on a personal level, these first three years also included a steep learning curve and the development of a deeper, fuller understanding of the scope of the bishops' duties. "You're appearing competent, really being scared to death," was how one bishop described those years. These two contrasting images of the first three years exist at the same time, with the new bishop experiencing a honeymoon with those in the external environment while also feeling personally overwhelmed. "Drinking from a firehose" was a frequent analogy used by interviewees, pointing towards the numerous responsibilities and oversight inherent in episcopacy authority that differed from the familiar ones of a diocesan or parish ministry role.

Bishops also referenced the grief and mourning that occurred when moving out of their beloved parishes. Especially when going into a diocese that was not familiar to them, the bishops missed the rhythm of the liturgical year, being comfortable with surroundings and knowing people in the pews. There was also an acknowledgment of the broader scope of

oversight and yet narrower influence that took some getting used to as the bishops moved from parish to diocese.

After about three years, most bishops indicated comfort with the diocese, their new executive role, and responsibilities. This comfort came from the bishops acknowledging that they knew how to handle the unexpected situations thrown their way, the repetition of concerns or issues that arose, and learning the diocese and becoming known in the diocese. Reflecting on the third year, one bishop said in that time, the leader found themselves being able to "start to get [their] own identity formed better" partially because the ministry settles down by that time, but also there is the internal and external acknowledgment that the individual knows how to work with and within the system.

The amount of carryover of parish ministry skills to episcopate ministry was reported as being low. A few bishops indicated that only 30 to 40% of skills they had used as a parish priest carried over into their judicatory oversight role. The new role resides in a more extensive system and has many more stakeholders to navigate, and the change in the different spheres of influence is significant. Bishops described going from the long-term relational context of a parish to jumping up to the governance and committees found within a region, where not all their prior knowledge and skills transferred. In a parish setting, interviewees had direct contact with the most important and influential voices in the congregation, whom the priest sees frequently. As the bishops transferred into a regional oversight role, they experienced a distinct difference in relational connections, and the interviewees noted a shift in their influence in terms of how to accomplish and carry out their vision as bishops. One bishop said that their initial focus was too "down in the weeds" and that he needed to re-direct their pastoral

instincts because the initial instinct was getting in the way of their executive leadership. With

multiple examples from bishops of varying episcopacy years, it became evident that there is a

more substantial reliance on relational trust and long-term reliability and trust rather than the

authority given by the canons. This amplifies the relational and interpersonal skills used in the

previous parish context but expands out to different zones of influence.

There is also the need to weigh in on things that they had not encountered in their

previous ministry contexts, whether wider diocesan visioning or cultivating a staff that builds on

each other's gifts.

Difficulty grappling with the vastly different scope of work and oversight was expressed

by both the previous parochial clergy and the former diocesan staff. There was very little

difference in the identity adoption step based on the bishop's sending context when elected.

The development of a new identity, cultivated and experienced in community, was not fully

realized until a bishop was multiple years into the episcopacy. The opportunity for a vision

shared by the diocese and bishop for ministry did not develop until after the bishop and diocese

were known to each other, and the relational bonds had formed.

Bishops with four or more years of episcopate ministry were asked to reflect on patterns

or seasons they have witnessed so far during their tenure. In addition to the first three years

being a honeymoon period, they referred to it as a time for learning more about their new

diocese and getting integrated into the region'' life and shared leadership. One bishop

pointedly said that the episcopate is an entirely different vocation than priesthood, so this

transition is not fully actualized until three years. Beyond the three-year milestone, bishops

mentioned various other years when they felt secure in their leadership and that they had

achieved the highest level of efficacy in the diocese. The milestones mentioned were at five years, six years, nine years, ten years, and twelve years. The wide range of responses indicates a varying rate of relational, trust, and strategic planning levels while also a vast variance in cultural and regional contexts. As indicated in the provisional selves conceptual framework, the complexity of the context greatly impacts the community's influence when a new bishop is undergoing the identity adoption and exploration process.

Finding 2

Finding two recognized the individual journey that bishops undertook when approaching their new role and adapting to a new professional identity. This adaptation required personal changes in behavior, expanding their scope of oversight as well as living into the role of bishop. There are required changes of personal behavior based on external perceptions of the role and responses to the role and authority. Interviewees registered surprise that people immediately had expectations about them and deferred to them after they received the title of bishop-elect or bishop diocesan. It took the interviewed bishops a while to experience the same comfort in the role as the people in the diocese had for them in the role. Eventually, one bishop said, "the brain catches up with the spirit." Stories ranged from not recognizing reserved parking spaces, expecting their former bishop to arrive when seeing "bishop" listed in the service bulletin, and not responding when someone called them by only "Bishop."" The diocese and community treated the newly consecrated bishop like a bishop. The external expectations were high, often unstated —even when a new person was stepping into an established role.

When asked about a moment when they realized their power and authority as bishop, interviewees frequently named an experience very early on in their episcopacy. Multiple anecdotes included dealing with complicated rector transitions in parishes. The now-bishops indicated that they were the only person in the room who could give the directions and set the vision to get the messy situations to a finalized and clean next step. Multiple bishops used their relational and trusted authority to give the mandate to close parishes in Spring 2020 at the height of the COVID-19 pandemic. As they indicated, there is no modern precedent for ultimately not allowing gathered, face-to-face worship in community buildings. This decision could be isolating and lonely for the bishops as decision-makers and pastoral leaders. Bishops were faced with receiving pushback from clergy and faith leaders and having to balance that pushback with COVID protocols and community tensions. This described "complex crisis" laid bare the anxieties of congregations, communities, and the strained relationships at all points of diocesan and parish systems.

External interactions figured prominently in validating them in their new role and authority, but frequently it took interviewees a long time to exercise this authority to make changes. A few bishops referenced the inherent authority and gravitas found within their new position. They were taken aback by the way "people hang on every word that the bishop says. And that can be jarring because it doesn't help you to think out loud." Bishops indicated that they had to change the way they processed their vision as well as find different ways to express their vision rather than speaking out loud.

This required change of behavior based on when a bishop is elected or begins a job is typical for the positional authority found in C-suite roles. Bishops spoke of the need to truly

adapt the job, their shared ministry team, and their own expectations to make the responsibilities fit their vision and the current needs of the diocese or convocation. One bishop recounted that they created a system to help support their ministry, but at the beginning, they had replicated the previous models and schedules. This lack of personal imprint on new episcopacies takes its toll as new bishops attempt to shoehorn themselves into an old and sometimes stagnant system that does not reflect their strengths nor their yet-developed vision.

Finding 3

Finding three identified that external influences, especially the power and authority of the new role, are strong as new bishops transition into their new ministry and community. Acknowledgment of the community and diocesan understandings of the leader guides the conversation between the individual's exploration of and community expectations for the bishop's role.

The recognition of visual and outward reminders of bishops' symbolic power was repeated throughout the interviews. The role is clad in symbolic power—the miter (the bishop's hat), and the crozier (the walking stick)—and emphasized by the bishop taking the ultimate position in a worship procession. Traditionally, bishops are the only ordained people who wear purple clergy shirts. One bishop reflected: "And I think that's where the caution comes in is in this symbolic power … the way that we dress … what we look like, even if you think of, of a traditional, large liturgy, where the bishop is really the sort of focal point." This symbolic authority is quickly imposed on a new bishop-elect and grappling with the authority thrust upon a person quickly after a decisive election can be challenging. Early on in episcopate ministry, the individual's full identity has not yet coalesced, and so there is a distance between

the external community's expectations for the individual and the individual's personal identity. This indication of symbolic power indicates the community's influences on the role identity context while it also helps the new bishop in understanding the external expectations of the community.

The episcopate power sometimes results in hurt, and disappointment may carry over with the miter. Many bishops were unaware of how their diocesan predecessors' wielding of power would impact their interactions with priests or other diocesan leaders. This points to the power found in the role itself, beyond who inhabits the current title. "So when I walk into a room, I feel like I sometimes still have three other bishops with me (and I) have to figure out which Bishop they're talking to, because it's not necessarily me," noted one bishop. These assumptions by community members based on their experiences with previous bishops are often unstated and therefore unknown to the new bishop, leading to a sense of disconnection of the person from the role and his own and others' expectations. Those who view the bishop only as a figure embodying the power and the authority of the position fail to see the unique individual who currently inhabits the diocesan leadership.

New bishops are learning to wield both the symbolic and positional power and navigate a new oversight role simultaneously. This is a sometimes-daunting task as they come to understand the external expectations for and inherent authority found in their episcopate ministry.

Recommendations

The findings from the twenty interviews conducted identified areas in which recently elected and consecrated bishops face challenges transitioning to their new professional, vocational, and ministry role. Following the identity theory and the provisional selves conceptual framework and based on the findings, I recommend three program additions to the College for Bishops.

Recommendation 1

During the twenty interviews, bishops infrequently named their imitation of positive role models, and very few mentioned they had a mentor as they entered their new ministry. The recommendation is to shift from a coaching program to a mentoring program in combination with the *Living Our Vows* program and cohort. The current College for Bishops coaching process pairs a new bishop with a "seasoned" bishop during the three years of *Living Our Vows*. The College trains the peer bishops in coaching so that there is consistency in the program and the approaches of the "seasoned" bishops as they encounter a new, formalized, structured relationship.

Coaching "involves practical, goal-focused forms of one-on-one learning and behavioral change" (Day, 2000, p. 591). Coaching asks individuals to identify a particular aspect of their leadership. From there, the coach provides external support with the ongoing process of becoming an executive leader or resolving the identified issue. Coaching, typically, is time-certain, whereas mentoring can be long-term and more fluid (Zust, 2017).

Mentoring can occur either formally or informally. Typically, mentoring pairs a senior, experienced executive with a more junior executive to share their experiences. Unlike coaching, which is about specific, achievable goals, mentoring is about the overall development of the "mentee" (Zust, 2017). The combination of mentoring, 360-evaluation, and action-learning has proven effective (Day, 2000). The opportunity to interact with more senior members of the same role also gives the junior member a more comprehensive, strategic understanding of the role and the organizational context (Day, 2000).

Unlike typical corporate transitions, the onboarding of new bishops to their roles provides limited assistance. Often, no one in the diocese has held the position of bishop, and therefore, no one with that unique perspective is available to help orient the new bishop to the job duties or scope of work. Currently, the practice of using "seasoned" bishops or other corporate mentors as coaches is a good one. A similar approach to finding mentors can be used to bring in the experience of a variety of bishops and contexts. A shift to a mentorship model could provide new bishops with an ongoing formalized structure in which they could observe and then imitate their bishop craft. This shift would give the new bishops access to immediate guidance on time-sensitive next steps and issues rather than relying on the *Living Our Vows* residency timeline. Not only would a mentor give time-sensitive direction, he or she would also serve as a role model for those new bishops who did not have that observation opportunity before their election. A bishop mentorship program during *Living Our Vows* would provide that immediate parachute and external support that is needed for role orientation and beginning stages of full or partial imitation and evaluation.

Recommendation 2

The interviewed bishops mentioned the overall increased scope of oversight was a significant shift from their previous role, whether a diocesan staff member or a parish priest. There needs to be an opportunity for bishops to share and discuss that broader context and different stakeholders with diocesan staff or other key leaders in a structured leadership program that builds support and understanding for the bishop and chosen participants. This new program would be one to expand the bishops' support networks, while also bringing others to see the oversight role and responsibilities.

Within this formal cohort learning experience, bishops would have the opportunity to share some of their oversight considerations, decision-making processes, and how they spend their time. Increasing their access to the expertise and experience of senior leadership would provide the new bishops a wider professional support system and give the participants insight into the diocesan role. Especially if the invited participants were interested in the episcopate, it could provide a guided path of identity shifts and mindsets that could help with their potential ministry exploration.

If the College provides a cohort learning experience, it will increase the efficacy of future leaders and the bishops themselves. In the interviews, bishops indicated that they had not fully understood the scope of the job before they were actively in it. Bishops explaining and exposing their ministry functions will aid in evaluating and formalizing their own identity evolution. In return, the cohort will be able to experience and "play" with an expanded scope of ministry and different type of ministry role. By peeling back the layers of the episcopate, this learning

experience will help with current bishops' identity evaluation (individual and community) and pinpoint the changes in the external and personal influences during their tenure.

Learning experiences that are shaped around role exploration and experimentation have proven to be an effective method. Petriglieri and Petriglieri (2010) researched the concept of identity workspaces in the business school context. A similar approach can be beneficial for the College incorporate when developing this new program. As the topics are created, the learning environment, too, needs to be intentionally cultivated. During transitional times of change and exploration, these business school identity workshops committed to providing "social defenses," responsive community spaces, and "rites of passage" (Petriglieri & Petriglieri, 2010). These commitments fostered an environment that promoted identity exploration that gave future leaders the opportunity to actively work towards the next steps of their professional roles.

This cohort program creates a safe space of experimentation and exploration for the invited participants as well as the bishops. The bishops can share their working and professional context and realities, modeling what their scope of ministry has expanded to be since their election. The reflection on professional identity also increases the awareness of their personal changes in the role, reflecting on their tenure. So, this format creates a learning experience for *non*-bishops as well by shifting the bishops diocesan into the sharing mode and then opens an expanded support network for the diocesan leader while also breaking down some of the mystery around the oversight role.

A few bishops mentioned the importance of sharing authority and the episcopate with others. This would look like a robust team that supports the shared vision while also

distributing and delegating based on strengths. The College for Bishops is the correct

organizational entity to develop this curriculum and then host these conversations. Having

intentional work informed by research would provide the discussion points and sharing to build

a stronger team with a collaborative, knowledgeable system.

Recommendation 3

The third recommendation is to add identity development and reflection into the *Living*

Our Vows curriculum. The interviewed bishops described their surprise that they were not seen

by parish priests, diocesan staff, or the external community as unique individuals, but instead as

their predecessor(s) or someone else who was in the position of power. This unexpected

transference was destabilizing, especially for those who had positive interactions with their

previous bishops.

Incorporating elements of the conceptual framework in the *Living Our Vows* curriculum

would help new bishops anticipate and respond effectively to these assumptions and

established expectations during the transition. *Living Our Vows* can address the contextual and

individual influences so new bishops can witness the potential divergences from their internal

expectations and the external realities. This conversation will only provide greater clarity on

what each bishop is stepping into in their unique context. Moreover, there is compelling

evidence that this topic, which was pointed to by many of the interviewees, be included as part

of the curriculum. Rather than internal, organization-based continuing education offerings or

personal reading, external training is found to be the most helpful for participants in becoming

more effective leaders (Ibarra, 2015, p.17). The College for Bishops has been developing high-

quality continuing education offerings and external trainings specifically based on the unique

context of the episcopate. Building on the strengths of the *Living Our Vows* program and the

good reputation of the College for Bishops, this addition is a natural enhancement to the

offerings.

Discussion and Conclusion

This capstone project aimed to address the following problem of practice: how can the College for Bishop provide more opportunities to aid in the identity transition of new Episcopal Church bishops? Following the provisional selves conceptual framework (Ibarra, 1999), four research questions were developed to guide interviews with twenty current bishops to understand their identity adaption and adoption arcs. Based on the findings from those interviews, three recommendations were made on possible ways for the College for Bishops to embed identity exploration in the College's offerings. The findings disclosed that bishops take multiple years to fully live into their episcopate identity and their new communities. In addition, the findings also indicated that individuals need to make personal changes in their leadership style, behavior, and professional identity with their expanded scope of ministry. Finally, the interviews shed light on the authority and power found in the episcopate and the external influences that were unknown to the bishops when they were elected.

This study relied on qualitative data from interviews to study the individual bishops' personal stories and influential moments in relation to their episcopate identity and journey. Existing research on leadership identity and the episcopacy was limited. Therefore, this project takes a first step in closing that gap and provides recommendations for further opportunities for identity exploration in current and future training for Episcopal bishops. Follow-on research could easily replicate this study design and apply it to other mainline Protestant denominations to add to the literature and research on bishops and leadership identity and development.

Limitations

The choice of qualitative research was intended to allow bishops to share their narratives and stories in a wider and open-ended question format. This open-ended question format proved to be incredibly helpful because it encouraged personal responses and allowed each interviewee to respond in the way that fit his or her leadership arc. The limitation of this qualitative format, however, was that it permitted the sample size of only twenty interviews. An attempt to survey across all tenure designations was planned, but it was not an even distribution. The sample size of twenty is not an accurate representation of the House of Bishops in its entirety, which includes retired and resigned bishops. To include only bishops who are currently in diocesan roles meant that resigned or retired bishops were not included in this research request.

With a good span of episcopate tenure and number of interviews, it would be possible to obtain documented, generalizable findings and stories of episcopate transitions and identity. A mixed-methods approach could have provided a strong foundation of identity adaptation and evolution, which could have been expanded on with individual, anonymous interviews. Another way to mitigate the study's limitation would be to have the survey request include retired and resigned bishops. Furthermore, prior to that request bishops could be contacted to gauge their interview interest, which could to gain their trust and buy-in before the one-on-one request.

Conclusion

The purpose of this capstone study was to shed light on the identity learning, experimentation, and adoption of Episcopal Church bishops. The significance of these findings stems from their contribution to helping the College for Bishops execute their strategic plan to provide ongoing learning opportunities throughout their episcopate. Moreover, this qualitative study points to the importance of adding intentional identity work to the ongoing offerings from the College. The findings from this research will provide the College for Bishops the ability to identify the places where this work can be incorporated into *Living Our Vows* and other continuing education touchpoints. By better understanding the identity struggles and processes of bishops, the College for Bishops' curriculum designers and board will be able to prioritize how to foster conversations on identity shifts and adoption. In particular, the College should look at some of the strategies suggested by Ibarra, such as job crafting to get the "feel" of new behaviors, "play" and improvisation (including role play) to see the reactions of others to new behavioral experiments, and networking as a way for bishops to absorb new information and establish allies—to be "outward" or externally focused. This is the antithesis of the "filling the empty bucket" approach to leadership development. This alternative approach will provide a strong foundation for new bishops to observe, experiment with, and evaluate their new roles as regional leaders. The recommendations of this research will enhance the efforts and commitments of the College for Bishops to provide executive leadership formation focused on the context of the Episcopal Church and worldwide partners.

Finally, this study significantly contributes to leadership development and episcopacy research. Due to limited research on the episcopacy and the leadership formation process, this

project captures the Episcopal Church episcopate as a snapshot in time and grounds the work within an identity framework. Multiple mainline Protestant denominations, particularly Methodists and Lutherans, can adopt identity exploration in their episcopate onboarding and training. Overall, this will benefit mainline Protestant denominations and the wider leadership and congregations as all encounter an potentially challenging future. The individual bishops, too, will benefit from increased knowledge of how their role and identity have impacted their episcopate. This study will also help researchers better exploit the research on identity work and reflection, moving beyond simple skill acquisition, in leadership theory. As the literature on religious leadership primarily focuses on parochial priests, this study that provides insight into the role of bishops and the major role transition which it entails will aid in enhancing the value of the College for Bishops.

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Appendix

Appendix A: Email Invitation

Dear Bishop _____,

  As a doctoral student in the Leadership and Learning in Organizations program at Vanderbilt University, I am working with the College for Bishops as we consider how bishops transition into their new roles as executive leaders. I would like to interview you for this study because of your years of episcopate ministry in the Diocese of _____. This project is interested in your personal narratives, pivotal moments, and identity shifts in your season(s) of leadership and learning. Your participation would be much appreciated and would assist the College and Church in forming leaders.

  Participation or non-participation will not impact your relationship with the College for Bishops. Participation is voluntary in the interview process. If you decide to continue, your identifying information will be kept confidential, and you will have the option to not respond to any question that you choose. Agreement to participate will be interpreted as your informed consent to participate and that you affirm that you are at least 18 years of age.

  Should you agree to participate, I will contact you to set up a 45–60-minute Zoom interview. My hope is for all interviews to be completed by _____. If you're willing and interested to be interviewed, I will send you a registration link to book time with me over the next month.

  If you have any questions about the project, please contact me, the Principal Investigator, Sarah Stonesifer Boylan, via phone 301-XXX-XXXX or email at _____@vanderbilt.edu or my faculty advisor, Dr. Chris Quinn Trank at _____@vanderbilt.edu. If you have any questions regarding your rights as a participant, contact the Vanderbilt Institutional Review Board (IRB) at (615) 322-2918. Please print or save a copy of this page for your records.

Sincerely,

Sarah Stonesifer Boylan

Appendix B: Interview Introduction

I am working on my educational doctorate in Leadership and Learning in Organizations at Vanderbilt University; my capstone change project site is the College for Bishops to consider how bishops transition into their new roles as executive leaders.

This project is interested in your personal narratives, pivotal moments, and identity shifts in your season(s) of leadership and learning. Over the next 3 months, I'll be interviewing other bishops at various other points on their episcopacy timeline – doing a push in the fall/winter to then code and analyze the information. And in the Spring I'll be writing up my findings and then making suggestions for the College for Bishops on how to include more executive leadership identity concepts within the *Living Our Vows* program and beyond.

Participation or non-participation will not impact your relationship with the College for Bishops. Participation is voluntary in the interview process. If you decide to continue, your identifying information will be kept confidential, and you will have the option to not respond to any question that you choose. Agreement to participate will be interpreted as your informed consent to participate and that you affirm that you are at least 18 years of age. This interview should take about 45–60 minutes, and it will be recorded if you give your consent.

Any questions?
If not, I'll start recording.

Appendix C: Research Questions and Interview Questions Grid

Research Question	Interview Questions	Tenure Year(s) asked
How have the bishops come to identify themselves as executive leaders? How has that identity emerged over time?	What do you identify as your leadership strengths from your previous ministry background [diocesan work, parish, etc.]?	All: <1, <4, 4–7, 7–10, 10+
	What do you identify as your leadership strengths as a bishop?	All: <1, <4, 4–7, 7–10, 10+
	What skills have you developed since becoming a bishop [x] years ago?	1–4, 4–7, 7–10, 10+
How do the sources of authority—canonical, ecclesial, and relational—play a part in the development of their identity?	Share an experience where you recognized your authority and leadership as a bishop.	All: <1, <4, 4–7, 7–10, 10+
	Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role.	All: <1, <4, 4–7, 7–10, 10+
What are the experiences of priests making the transition from cleric roles to leadership roles?	Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy.	All: <1, <4, 4–7, 7–10, 10+
	Tell me about your transition into parish and then diocesan leadership.	All: <1, <4, 4–7, 7–10, 10+
	What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads?	All: <1, <4, 4–7, 7–10, 10+
	Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries?	All: <1, <4, 4–7, 7–10, 10+

How do the different phases of a career in the clergy contribute to the leadership identity?	How have you come to identify with your role as bishop?	All: <1, <4, 4–7, 7–10, 10+
	What do you wish you had known or been taught earlier on in your episcopacy?	1–4, 4–7, 7–10, 10+
	Looking back on the past XX years, is there a pattern of seasons of ministry or identity formation that you can witness? What does that look like?	4–7, 7–10, 10+
	In the [18 months] since your name was announced as a bishop nominee, what kind of mindset shift occurred between nomination, election, consecration, and then "on the job"? Had you anticipated these shifts?	<1

Appendix D: Interview Questions and Episcopate Ministry Tenure

Interviewee	Questions
Newly elected and consecrated <1 year	• Tell me about your transition into parish and then diocesan leadership. • Share an experience where you recognized your authority and leadership as a bishop. • How, so far, have you come to identify with your role as bishop? • What skill sets have you identified as being most important for a bishop? • What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads? • In the [18 months] since your name was announced as a bishop nominee, what kind of mindset shift occurred between nomination, election, consecration, and then "on the job"? Had you anticipated these shifts? • Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy. • Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries? • What do you identify as your leadership strengths from your previous ministry background [diocesan work, parish, etc.]? • What do you identify as your leadership strengths as a bishop? • Where do you anticipate your leadership skills developing? • Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role.
1–4 years of bishop ministry	• Tell me about your transition into parish and then diocesan leadership. • Share an experience where you recognized your authority and leadership as a bishop. • How have you come to identify with your role as bishop? • Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy. • What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads? • What skill sets have you identified as being most important for a bishop? • Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries? • What do you identify as your leadership strengths from your previous ministry background [diocesan work, parish, etc.]? • What do you identify as your leadership strengths as a bishop? • What skills have you developed since becoming a bishop [x] years ago? • What do you wish you had known or been taught earlier on in your episcopacy? • Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role.

4–7 years of bishop ministry	- Tell me about your transition into parish and then diocesan leadership. - What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads? - Share an experience where you recognized your authority and leadership as a bishop. - How have you come to identify with your role as bishop? - Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy. - What skill sets have you identified as being most important for a bishop? - Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries? - What skills have you developed since becoming a bishop [x] years ago? - What do you wish you had known or been taught earlier on in your episcopacy? - Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role. - Looking back on the past 4–7 years, is there a pattern or seasons of ministry or identity formation that you can witness? What does that look like?
7–10 years of bishop ministry	- Tell me about your transition into parish and then diocesan leadership. - What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads? - Share an experience where you recognized your authority and leadership as a bishop. - How have you come to identify with your role as bishop? - Describe a roadblock you experienced between going between [parish] ministry and then entering into your episcopacy. - What skill sets have you identified as being most important for a bishop? - Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries? - What skills have you developed since becoming a bishop [x] years ago? - What do you wish you had known or been taught earlier on in your episcopacy? - Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role. - Looking back on the past 7–10 years, is there a pattern or seasons of ministry or identity formation that you can witness? What does that look like?

10+ years of bishop ministry	- Tell me about your transition into parish and then diocesan leadership. - What was the diocesan story shared as part of the discernment process? Where have you found (or not found) those narrative threads? - Share an experience where you recognized your authority and leadership as a bishop. - Describe a roadblock you experienced between going between [parish] ministry and into your episcopacy. - How have you come to identify with your role as bishop? - What skill sets have you identified as being most important for a bishop? - Did you have a bishop as a mentor before entering into the episcopate discernment process? If so, what did that formation look like? How did that bishop mentor prepare you for the transition between ministries? - What skills have you developed since becoming a bishop [x] years ago? - What do you wish you had known or been taught earlier on in your episcopacy? - Tell the story of your authority and power within your episcopate. Describe your personal identification with what it means to be a bishop and live into that role. - Looking back on the past 10+ years, is there a pattern or seasons of ministry or identity formation that you can witness? What does that look like?