

'Inviting Forward' – A Case Study

'In business it's common practice to get together to have a team discussion when things are bad and problems need addressing, but imagine if you were to meet more frequently when things were going well. What if you took time to identify the key factors of a success and find out what exactly it is that's making everything tick along so smoothly? I know everyone says that failure is a great teacher, but that doesn't mean we can't also learn valuable lessons from our moments of success.'

Stand Up Straight: 10 Life Lessons from the Royal Military Academy Sandhurst, Major General Paul Nanson; Century Publications, 2019, p53 (e-book).

Where I'm coming from

While the training at Sandhurst is well known for testing the limits of future British army officers' endurance and resilience, it is striking how the then Commandant recognises the huge importance of identifying what works well and the underlying reasons for success, however that is defined. This, of course, lies at the very heart of appreciative inquiry (AI), even if Nanson's book says nothing at all about AI.

It might seem like a huge leap to jump from the military training context to the church, but this case study will make the connection clearer. Perhaps I should add here that before becoming a minister of the United Reformed Church I was a Church of Scotland minister and served as a military chaplain for a total of 19 years, 16 with the RAF and then a further 3 years with the army.

On returning to civilian ministry I couldn't help noticing that I had moved from an environment where people are generally well motivated and positive, to one where problems and difficulties often seemed to predominate, despite the gospel message of God's love which underpins the church's life and mission. I felt the irony of this more deeply when I became the development officer for the URC's Yorkshire synod in 2007, a role which involved trying to help individuals, leadership teams and whole churches adapt well to whatever new challenges they faced.

Where the Synod was coming from

Shortly after my appointment the synod set up a small group to design and implement a process for helping congregations look at their effectiveness. Although we tried to be as non-prescriptive and encouraging as possible, we ended up with something administratively burdensome for both the synod and the churches and, frankly, when it died a natural death after just a few years I think everyone breathed a sigh of relief. Nor were we helped by giving this new process the rather unimaginative title of 'Church Life Review' – the more I tried to convince churches that we weren't trying to impose some kind of ecclesiastical Ofsted inspection, the more sceptical they became!

But what to do now? In concert with others we still had a responsibility to support our local churches and to do so in a way which they would find helpful, affirming and encouraging, as well as signposting possibilities for their future. I'd like to be able to say that I was immediately able to offer appreciative inquiry as a viable alternative, but the truth is I didn't even know about AI – or, rather, my only awareness of it was from a conference I'd attended some years previously but I wasn't then able to make the necessary connections.

This began to change in 2015 when, over a 'free' lunch (there's always a catch!), I was asked to help Yorkshire Synod become a pilot project for seeing how appreciative inquiry might be appropriately integrated into the life of the United Reformed Church. It was a good lunch, and I was being asked by a long-time friend and colleague, so I happily agreed – and, anyway, my friend had already been

primed to approach me by my synod moderator! Looking back I'm very glad I said 'yes', for that marked the beginning of a journey which I have personally found exciting and energising, as well as giving me the necessary skills and insights to be able to articulate a more hopeful and positive outlook for both myself and others.

Starter and first courses

The first small step was to arrange a local 'Taste of AI' course in April 2016, to which were invited various key people from across the synod. Led for us by Fiona Thomas (now of Appreciating Church) and Tim Slack of Appreciating People, every one of us who participated was enthused by the idea of AI, even if we couldn't yet see how this could be made more concrete in the church. However we had seen enough to recognise that our defunct church life review process could definitely benefit from being redesigned from an appreciative inquiry perspective – albeit with a different name! Following the taster course I contacted all who had been present, inviting volunteers for a new task group to begin this work; we ended up with around 10 participants.

Over the next few months we met on a couple of occasions to continue our explorations, these meetings being ably facilitated for us by Tim Slack. One thing which immediately struck all of us was how these meetings were so different from the normal committee meetings most of us usually experienced. There was energy, good humour, creativity in abundance, equal attention given to every voice and, frequently, unexpected outcomes which took us in entirely new directions. Of course, eventually we all came to recognise this is a common occurrence when AI is used and embraced by participants, for we were beginning to internalise appreciative inquiry principles and practices, even as we were thinking of how to use it with others. In between the group meetings I benefitted from individual sessions with Tim and, again, enjoyed the 'on the job' learning which was happening.

In November 2016 I and 5 others from the group attended the advanced 'Developing Your AI Practice' residential course, held at the URC's Windermere Centre. Again this was led by Fiona Thomas and Tim Slack, with further input from Tim's wife, Suzanne Quinney. Once more we were inspired by what we were learning, but I particularly resonated with Suzanne's stories of how AI was changing the culture within the NHS. For me I began to realise just how deeply transformative appreciative inquiry can be even in the most demanding of situations and was impacted by Suzanne's real life examples.

Learning by doing

Those who have tackled the advanced course will know that a key part is working on a current, ongoing project, with the aim of consolidating new learning. For us from Yorkshire Synod we had already decided that half of us would begin to look at relating AI to the field of conflict transformation, but that is for another day! The other half built on the church life review project already begun, and it was at this point it was renamed '*Inviting Forward*.' As I was in the conflict transformation team I didn't know how or why this title emerged – and I still don't! Nevertheless the name stuck and as we continued our project work over the next 6-12 months it was clear that we had struck gold. Whereas the old church life review process came across as something being imposed from synod, *Inviting Forward* began to be appreciated as an invitation to churches to think together about their life going forward. In a nutshell, our aim was to encourage congregations to have a positive vision for the future, starting from looking at what was working well in the present.

As our task group – now called the synod's AI steering group – became more knowledgeable about appreciative inquiry, the ideas began to flow thick and fast. We needed to develop a questionnaire or protocol which would enable a 'whole system' conversation so that every voice could be heard equally; we needed to find some churches willing to act as guinea pigs for what we were doing; we

needed to find ways of incorporating our work into the structures of the synod without being sucked back into old, reactive patterns of behaving; and, above all, we needed to design a process which churches would perceive as liberating and helpful. At the same time, we all recognised instinctively that for this design work to flourish our own steering group had to function according to AI principles, which meant us allowing ourselves to be changed in the process – or, to put this another way, we had to be open to the AI principle of simultaneity.

Inevitably we had our fair share of false starts or dead ends, but it is testimony to working in such a creative way that at no time did our group ever feel discouraged. On the contrary we shared a commitment to our task, while enjoying each other's company and being open to see what would materialise from our conversations.

Testing the prototype

Eventually we reached the stage of being able to trial *Inviting Forward* and were rewarded with positive responses from the churches willing to help us with the final tweaks. After some minor revisions we ended up with a 3-part process:

- i. Paired conversations involving as many people associated with the church as possible. For the majority this usually happened within the context of worship, but we also aimed to reach out to other user groups, as well as anyone housebound. (*See examples of the questions asked at the end of this article*).
- ii. A church SOAR (Strengths, Opportunities, Aspirations, Resources/Results)¹ day, again involving as many of the extended church community as possible, during which participants built on whatever had emerged from the paired conversations by beginning to imagine what the future could look like and identifying the next small steps with which they felt comfortable.
- iii. If required, a follow-up meeting with key leaders within the congregation to help facilitate putting more 'flesh on the bones' regarding those next steps, looking at such things as resources needed and timescales, while also offering any further help which might be made available from the synod.

Further details are engagingly described in the accompanying 'Guide for Churches'. As the guide makes clear, for any church considering doing *Inviting Forward* there is an initial meeting with the leadership team, during which they are invited to identify a few people willing to work alongside a couple of synod facilitators. From the very outset, therefore, local ownership of the process is encouraged, while the involvement of people from the congregation (and possibly other connected groups) helps to ensure the final outcomes are realistic.

Looking at how it worked

So ... how successful were we? The answer, of course, rather depends on how success is defined, but certainly my experience was that all who engaged fully with *Inviting Forward* were encouraged. They began to see new possibilities, to articulate significant dreams, to recognise the importance of everyone's contributions, and to take the first few steps towards a more positive future.

For me, however, lasting change is the true measure of success, and that only tends to happen when people themselves are changed, rather than just the organisation around them. By their very nature churches evolve slowly, since the familiar ways of working and doing things are for many deeply comforting, especially if everything else around them seems to be changing at an almost

¹ SOAR™ originates with Jacqui Stavros and Gina Hinrichs. See their *Thin Book of SOAR 2009 and 2019*

incomprehensible rate. We therefore fully expected *Inviting Forward* to take quite some time to be widely known and adopted, and that was before Covid-19 appeared on the scene!

Yet lasting change within individuals has indeed occurred and members of the steering group frequently shared stories of how they were benefitting from using appreciative inquiry in other contexts, sometimes with family members, sometimes with work colleagues, sometimes in different voluntary roles, and so on. Indeed, we often set the tone for our meetings by beginning with an open invitation for anyone to share something they had learned about AI while going about their normal routines. Unlike many meetings with which I've been involved, where people are reluctant to share, within our steering group meetings I often had to call a halt to the ensuing conversation so we could move on with our project!

The synod, too, has been impacted beyond *Inviting Forward*, as shown by the fact that the AI steering group has a broader remit 'to encourage the development of appreciative inquiry throughout the synod,' running alongside the specific requirement to 'monitor and develop ... *Inviting Forward*.'

Next steps

And what difference has appreciative inquiry made to me? I retired from the role of Yorkshire Synod's development officer in October 2020, but for the last 4+ years in my work seeing how *Inviting Forward* was beginning to make a difference to local congregations was a huge encouragement. Moreover, as I have tried to allow myself to be impacted by AI, I have found myself intentionally seeking to positively affect conversations by asking the right, first, fateful question. Only the other day my wife and I were visited by someone currently going through an extremely challenging time. While the conversation could easily have become quite depressing by focusing on the difficulties being faced, I simply asked our visitor what she had learned about herself during the past 6 months and to her benefit. She spoke of finding skills she didn't know she had, of personal resilience, and of a new-found confidence both for now and the future. It was a humbling and moving moment – just another example of how AI can lead to unexpectedly positive insights and outcomes.

Finally, since this case study mainly concerns those of us who worked on *Inviting Forward*, let the last word be with them. A year or so after the steering group had been set up a new synod clerk was appointed. As part of his settling in he wanted to sit in on one of our chaotic, fun-filled, productive, enriching, exciting, energising meetings. As he knew nothing about appreciative inquiry I invited the group members to each explain AI in their own words. Without exception everyone defined it as a creative conversation, at which point I knew we were well on our way to becoming an appreciative synod. Without realising it initially, we ourselves had been invited to go forward with new found faith and confidence, and that must definitely count as a success!

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INVITING FORWARD – TYPICAL QUESTIONS USED FOR PAIRED CONVERSATIONS WITHIN CHURCHES

(These conversations usually take place within the context of worship and last for about 40 minutes; ie 20 minutes for each respondent)

1. What do you enjoy about this church and why?
2. Describe a time when this church has been important for you, or made a real difference. *(It can be just a small thing.)*
3. What does this church do really well?
4. What would help this church to become even better?
5. Think of a small step which could help achieve this. *(This might be either a small step for the church as a whole, or for the individual respondent.)*

The answers given are then all collated by the project team and used as the starting point for the church SOAR day. As this is the first time most will have seen the collated responses, early on people are asked if there is anything which surprises them, or perhaps even concerns them. Any concerns are noted on a 'parking sheet' for attention during the rest of the day. In practice, many of the concerns tend to be addressed as the day unfolds, but it is important to check this towards the end. After hearing initial reactions, the rest of the day is given over to people working in groups to:

- a. Dream dreams;
- b. Identify intentions – ie moving from aspiration or ambition to intention;
- c. Identify preferences using some kind of voting system;
- d. Identify priorities using a now, sooner, later framework;
- e. Identify the next small steps and who will do what. (The more people involved at this stage the better, as that inevitably encourages a deeper commitment to the process and a concomitant wider acceptance of the outcomes).

By way of follow up, local leadership teams are encouraged to continue monitoring progress for themselves, although the facilitators are available if required.