

Releasing and resourcing – an Appreciative Inquiry approach to retirement



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Context

From the end of 2016 I exercised full-time ministry of Word & sacraments with a pastorate in North East Wales that comprised 3 congregations (one United Reformed Church, one Presbyterian Church of Wales and a third uniting both denominations) and a community centre. Although I acted as Chair of trustees of the centre, I was effectively a part-time manager there. When I was called to the pastorate we all knew that I would be retiring at the end of July 2021.

At the time I arrived, the North Wales region of the URC was beginning to work out how to manage the stipendiary ministry deployment challenge of moving from 5 full-time ministers (one PCW and 4 URC) to 2 URC, plus one paid by the PCW. During the period of consultation, one URC minister retired early on health grounds and another went down to 50%. My retirement then left a 50% potential vacancy. This has been increased to full-time, for technical reasons. What this means in practice is that there will be a further period of consultation before deciding what form the vacancy will take - which churches will be primarily served by a new minister and which will be offered support more generally from the ministry team. This leaves the pastorate I was serving in a period of uncertainty.

I had planned to take a two-month sabbatical from mid-April to mid-June 2020 to walk the Camino de Santiago de Compostela, the aim being to reflect on my ministry and plan how to prepare the pastorate for my retirement. Of course, this did not happen and all my energies were focussed on leading churches and community centre through the pandemic.

So *Project Prepare for Retirement* only began in earnest at the beginning of 2021, with the aim of leaving elders and congregations, trustees and staff feeling resourced, confident and hopeful on 1st August.

The planned process

Using a range of AI tools a three part plan emerged that involved various combinations of elders, trustees and myself. Although we never got together to share the whole plan it was clear to the elders and trustees that certain aspects were designed to prepare them to lead in future.

The parts of the plan were:

- each elders meeting completed a SOAR analysis, focussing especially on how they had come through the pandemic and what resources might be needed for/in the future, with the resulting analysis being used to create a new vision statement which was to be endorsed at their 2021 AGM;
- I created Provocative Propositions for each church, the community centre and another project I was leading locally and, working backwards used them to create the agendas for the meetings leading up to my leaving;
- I had Appreciative Conversations with each elder individually, sharing the results (anonymised as far as possible) with the elders meetings, with the aim of building up confidence in their own leadership and creating hope for the future.

Documentary evidence

A range of papers designed for the process are available on request:

- SOAR analysis forms for each church,
- the Provocative Propositions and the stages/agendas created to lead to their fulfilment,
- the protocol for the Appreciative Conversations

Outcomes

What worked

- The SOAR exercise with the elders at the turn of the year had the effect of them feeling more confident, having realised the way they had come through a range of difficulties and hurdles - using Zoom, keeping in touch, risk assessments and COVID-19 requirements. It addressed the way in which they needed to be resourced in the future.
- The Provocative Propositions stated how I wanted to leave things. I found the process of drawing up agendas for the (already arranged) meetings leading up to my retirement to be a good way of easing, if not eliminating, the stress I was feeling. The process went some way to ensuring nothing was missed. In the end, most of the propositions were fulfilled.
- The Appreciative Conversations were intended to give the elders space to express themselves in confidence and that was welcomed by them. The conversations were fairly focussed. The questions had been sent out in advance and some elders had gone through and made notes. Most meetings were held face to face - the weather helped as we could meet in gardens. One or two relied on Zoom. It was touching to

hear how much my ministry had been appreciated and encouraging to hear elders looking forward positively, if a little tentatively at times.

For the most part the project achieved what I set out to do - leave the pastorate in good heart. Realistically I know that there are still challenges ahead, particularly for the smallest congregation, but I left feeling confidence in their abilities to lead and to also seek out support when they needed it.

What might have been different

- The Provocative Propositions was the only aspect which touched the community centre. Although I had 'exit conversations' with staff members and some trustees, particularly the treasurer, it would have been better, had time allowed, to have longer Appreciative Conversations with them too.

What might be useful elsewhere

- The SOAR analysis and Appreciative Conversations are well-known as useful tools and there is much supporting comment on them.
- I think that using Provocative Propositions in the way I did could be transferred well to project and event planning. Spending time imagining a successful event or outcome in as much detail as possible and documenting every element can identify the steps and tasks that are needed to ensure the best outcome. Then breaking them down helps to draw up a timetable. It is the 'present tense' aspect of Provocative Propositions that makes the difference from other ways of project planning. It creates a sense of commitment to an envisioned future and demands some careful, detailed thinking.

Concluding remarks

I have long thought that AI was not just a set of useful tools for (change) management, but a way of seeing the world. Identifying and building on strengths, anticipating organic change, and the importance of intentional conversations have become part of life for some of us. I am currently working on an application to the National Lottery People & Places Fund and was impressed that building on strengths is now one of their criteria, and they offer a specific tool/exercise for committees to identify their strengths and weaknesses. I appreciate (!) this approach more and more as I see that some situations call for the kind of major exercise led by Mark Lau Branson¹, whilst others simply need an afternoon working through a SOAR analysis. This range is something that has emerged in Appreciating Church's experience - from the light touch to the major project support.

During lockdown I worked towards a Certificate in Cross-professional Supervision and can see so many ways in which AI can enhance that practice too. My other interest in the Enneagram also feeds into this work of bringing the best out of people, by helping them recognise and delight in the best of themselves.

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¹ See his book *Memories, Hopes and Conversations: Appreciative Inquiry and congregational change* (2016) 2nd edition, Rowman & Littlefield