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# AI Practitioner



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# Spirituality and Appreciative Inquiry

Edited by

**Duane Bidwell, Ph.D.**

**Katherine Rand, MPP**

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## Spirituality and Appreciative Inquiry

Inside this issue

### Welcome to November 2014 issue of AI Practitioner

Spirituality and Appreciative Inquiry celebrates the spiritual dimension by exploring its connections with AI theory and practice. Editors Duane Bidwell and Katherine Rand bring together articles that reflect on how spirituality, spiritual practice and AI flow together to shape the experiences of practitioners and participants. Articles highlight new practices, offer case studies and provide insight into ways of integrating spirituality and AI principles.

Kristen Crusoe, Annette Garner, Kathlynn Northrup-Snyder and Sarah Wallace describe an innovation in nursing education in the Feature Choice article "Using Motivational Interviewing in Nursing for Improved Professional Development: Moving from Appreciative Inquiry's Dream to Destiny Phases."

In Research Review & Notes, Ottar Ness highlights first-person perspectives in dual

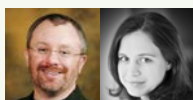
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We would like to thank Joep C. de Jong and JLS for sponsoring this issue.

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Editor, AI Practitioner

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# Voices, Values and Vision

## Claiming the Best of a National Faith Tradition

This two-year initiative for the Unitarian Universalist Association was designed to 'discover our shared aspirations and unleash the power of our faith'. The article describes the highly accessible design and materials, demonstrating how an AI process can be grounded in spiritual practice versus belief, explore shared spiritual values versus dogma, and assimilate people whose voices are not often heard through intimate and meaningful conversations.

In early 2009, the Unitarian Universalist Association (UUA) – like many liberal religions – was challenged. Church membership was dwindling and finances were strained. Congregations and fellowships were operating independently, rather than resourcing and supporting one another. National administrative staff – providing programs and services to stimulate growth and enhance spiritual vitality – felt disconnected from “the people in the pews”.

Incoming president, Reverend Peter Morales, sought to stimulate new vision by giving voice to people's deepest values. Having experienced Appreciative Inquiry as a parish minister, Morales recognized its congruence with Unitarian Universalist (UU) principles and values, and invited me to propose a process to radically engage everyday Unitarian Universalists in setting direction for the movement.

When we come together and share our most precious memories and deepest aspirations, we discover how much we have in common. Relationships are strengthened, and our motivation to pursue shared dreams rises. Our hope was that this unfolding would occur within, between and among congregations.

Peter Morales  
President, UUA

The result was a two-year initiative involving more than 1,000 congregations and hundreds of “unchurched” Unitarian Universalists. It was called *Gathered Here: An Invitation to Discover Our Common Aspirations and Unleash the Power of our Faith*.



### The goals behind the goals

*Unitarian Universalism's Seven Principles:*

- 1 The inherent worth and dignity of every person
- 2 Justice, equity and compassion in human relations
- 3 Acceptance of one another and encouragement to spiritual growth in our congregations
- 4 A free and responsible search for truth and meaning
- 5 The right of conscience and the use of the democratic process within our congregations and in society at large
- 6 The goal of world community with peace, liberty and justice for all
- 7 Respect for the interdependent web of all existence of which we are a part

Unitarian Universalists are bound to one another by shared principles, rather than dogma or doctrine. The principles themselves are “strong values and moral teachings: a guide for those who choose to join and participate in UU religious communities”.<sup>1</sup> They bear a striking similarity to many of the underlying assumptions of and values embedded in Appreciative Inquiry (AI).

It was this very similarity and congruence that initially turned UUA leaders towards AI. They understood that the process would amplify and reinforce some of the best of the faith – even as it built momentum for a new future.

In addition, leaders shared some more tactical goals for the process. They wanted to set strategic direction for the UUA in a manner that would increase the vitality of local UU communities, and to strengthen relationships between the denomination's board of trustees and staff. So in November, 2010 the two governing bodies agreed to co-sponsor an AI-based strategic planning process “solidly rooted in and responsive to our congregations' most compelling desires for the denomination's future”. The board also tasked me to help them engage and give voice to historically marginalized groups within the Association.

### The methodology: Getting started

Morales, the board moderator (chair) and two senior staff members identified and recruited a 16-person planning team consisting of board and staff members; clergy; lay leaders; and informal leaders working with young adults, communities of color and UUs not connected to congregations or fellowships. Team members finalized the scope, selected topics, crafted questions and an interview guide, and designed an inquiry process to address the organization's unique characteristics/challenges:

<sup>1</sup> <http://www.uua.org/beliefs/principles/>

Leaders wanted to set strategic direction for the UUA in a manner that would increase the vitality of local UU communities,

Six months into the process, the planning team recommended a radical paring down.

- Potential participants were geographically dispersed volunteers from self-governing, self-directing organizations.
- A relatively small percentage of people identifying as Unitarian Universalist were members of traditional congregations. Thousands of others were engaged through youth conferences, camps, grassroots interest groups and an international online spiritual community (Church of the Larger Fellowship).
- Communication and collaboration among congregations, fellowships and other groups were haphazard. There was no way to reach all affected parties with a single, consistent message.

### Evolving design

The initial design involved a complex infrastructure of endorsements by UU interest groups (ministers' association, religious educators, musicians' network, people of color etc.), dedicated administration, senior and local facilitators, and modular materials. But it soon became evident that the complexity was a barrier to participation. Six months into the process, the planning team recommended a radical paring down. The result – a simple, straightforward, downloadable set of materials<sup>2</sup> – immediately took hold. These materials included one-on-one interviews, “community conversation” guides<sup>3</sup>, facilitator packets and summary sheets.

The combination of simplified activities was indeed the “secret sauce” for increased participation. Promoting the design through our broad-based network of champions, we watched participation grow exponentially. But increased participation came with a cost: feedback was spotty. Organizers had no way of knowing who had completed interviews, and therefore no capacity to track down missing summary sheets. The implications of this issue are discussed in the Summary.

One-on-one interviews took place in person and via phone and video calls. An online “matching” site enabled people to find interview partners. Community Conversations were convened in intact congregations as well as at district gatherings, camps and conferences. In addition, because of the project's stated goal of actively involving people whose voices were not often heard, a small group of facilitators created and implemented a virtual Community Conversation process. Among the communities successfully reached were geographically dispersed people of color, people with disabilities, and young adults.

The 15-month Discovery period was coming to a close shortly after the organization's annual General Assembly, during which more than 3,000 UUs from around the nation convened for five days of business meetings, workshops and worship. In order to fully leverage this large assembly of dedicated UUs, the team launched a final “blitz” of Community Conversations, scheduled during breakout sessions. They also invited

<sup>2</sup> The central website, [www.uua.org/gatheredhere](http://www.uua.org/gatheredhere) still exists. Original materials remain available.

<sup>3</sup> “Community Conversations” are group gatherings involving two-way interviews combined with minimal “Dreaming.” For more information, see Whitney and Trosten-Bloom, p. 248.

Because of the project's stated goal of actively involving people whose voices were not often heard, a small group of facilitators created and implemented a virtual Community Conversation process.

people to conduct "spot" interviews using materials that were available in the exhibit hall. Anyone could conduct a 15-minute interview and return their notes, in exchange for a raffle ticket awarding credit in the UU bookstore.

### Meaning-making, dreaming and implementation

To make meaning of the feedback, a small, diverse group of board, staff and lay members convened a two-day "meaning-making" session during which they read and reflected on summary sheets, tracking patterns and themes to determine the "positive core of Unitarian Universalism". Because of the board's commitment to hear from people "at the margins", they then re-read summary sheets from interviews conducted with members of traditionally marginalized groups, comparing what they'd learned from these participants to what had emerged in the first round of analysis. In the end, the group identified eight positive core elements, supporting stories and a vision statement in a final report.

This report was presented to the board and senior staff. It contained powerful stories and examples of the faith at its best, along with a summary of the findings and a demographic summary of known participants. During a four-hour feedback session, board and staff participated in reflective interviews and conversations targeted at validating the findings and determining their implications.

Both the full-length report and a summary of findings – along with yet another set of reflection questions – remain available on the *Gathered Here* website. To this day, individuals and groups who wish to "fan the flames" of *Gathered Here* are invited to consider the individual, local and global implications of the UUA's positive core and strategic vision.

### Outcomes

Former project leaders describe *Gathered Here* as having had a profound effect on participants – and on the faith as a whole. As Linda Laskowski, former planning team member and board trustee says, "*Gathered Here* gave people space to think differently and acknowledge differences – but also to recognize similarities. It strengthened our sense of common purpose."

The summary report and reflection process played a vital role in the board's revision of the Association's "ends" statements (goals). As such, according to Morales, it helped shape the everyday work of the staff. The stories, says Laskowski, continue to be referred to and quoted by the board and others. "It's a body of knowledge with powerful long-term implications," she says.

As intended, *Gathered Here* also strengthened relationships between various UUA bodies and congregations. "It built synergies between governors and other UUA departments and functions," says Reverend Harlan Limpert, Chief Operating Officer for the UUA. "It is very exciting to lead right now."

'*Gathered Here* built synergies between governors and other UUA departments and functions. It is very exciting to lead right now.'  
Rev. Harlan Limpert  
Chief Operating Officer, UUA



One-on-one interviews took place in person and via phone and video calls.

Many participating congregations and communities communicated the benefits they experienced. For example, Rev. Dr. Nate Walker, former Senior Minister and Executive Director for First Unitarian Church in Philadelphia, says *Gathered Here* stories influenced and were incorporated into his church's worship, governance and evaluation. "It became part of a communications toolkit we used to train one another."

Finally, the fateful decision to actively engage those whose voices are not often heard has continued to unfold through an ongoing initiative called "Congregations and Beyond". When *Gathered Here* successfully reached out to and engaged people who were philosophically and spiritually aligned with the faith (but who did not participate in the life of a congregation or community) it planted seeds for future grassroots activities that have yet to emerge. It may even have predicted one vital way in which Unitarian Universalism will adapt to the changing nature of American culture.

### Summary

In the end, organizers recognized that the outcomes they'd tracked were reported by an unknown fraction of *Gathered Here* participants. Indeed, based on anecdotal information, they estimated that more than a third of the people participating in *Gathered Here* processes did not report their findings. People met, formed relationships, unleashed new ideas and perhaps even launched projects – but never made the connection between their participation and the changes it inspired. Based on the outcomes that were tracked, however, it is fair to assume that the effect was profound.

*Gathered Here* was one of the more ambitious and complex initiatives ever undertaken by the UUA. Involving multiple goals and potentially thousands of participants, it engaged UUs within and beyond congregations in conversations about "what gives life to our faith", and "our hopes, dreams and aspirations for Unitarian Universalism's future". A tangible manifestation of UU values – respect, interdependence and inquiry – it had a powerful impact on individuals, congregations, UU communities and the movement as a whole. Its evolving design demonstrated the importance of simplicity, for organizations seeking to reach diverse, dispersed stakeholders. In the words of one participant *Gathered Here* was "faith-making".

### References

Whitney, D. and Trosten-Bloom, A. (2010) *The Power of Appreciative Inquiry*. 2nd Edition. San Francisco: Berrett-Koehler Publishers.

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## Purpose of AI Practitioner

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