

Volume 3 of the Eldership and Oversight handbook series

# Spiritual reviews

Reviewing the spiritual life of the meeting  
and its expression in caring

QUAKER  
books



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of the meeting  
and its expression in caring

**Volume 3 of the  
Eldership and Oversight  
handbook series**

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A book with this title was originally published in October 1999 as Volume 3 of the Eldership and Oversight handbook series. The text of this 2012 edition is entirely new.

Abbreviations used in this book

*Q&P: Quaker faith & practice*

LM: Local Meeting

AM: Area Meeting

# Introduction

Whether elders and overseers are appointed or not, local meetings should regularly review their spiritual life and its expression in caring. A meeting might like to compile and use a series of queries for this purpose. Such a review could take place every two or three years and might in itself be a form of pastoral care. The process might start in small groups, in which unmet needs could be revealed and confidentiality respected, then move on to an occasion drawing all together. Special attention might need to be given to involving those associated with the meeting who take little part in its regular life because of youth, age, disability or disaffection.

(*Q&P* 12.16)

Our long tradition in Britain Yearly Meeting of reporting on how the spiritual life is faring goes back to 1682, when representatives from each quarterly meeting were asked to reply to three questions orally, “so that progress of the Society throughout the country could be seen and help given in the areas where it was most needed” (*Q&P* 1.04). The first two of those early queries ask which Friends had died in the past year; the third asks Friends how the Truth has prospered amongst them since the last yearly meeting, and how Friends are in peace and unity. A later version of the queries expands that focus on the health of the worshipping community, asking, “What is the state of your Meeting? Is there any growth in the Truth? And doth any Convincement appear since last year? And is Love and Unity preserved amongst you?” (*Christian and brotherly advices given forth from time to time by the Yearly Meetings in London, c.1738–c.1771*, p.309 (MS VOL 39))

Today we make regular use of *Advices & queries* in our meetings for reflection and for challenge and inspiration; but we should also take the opportunity from time to time to think through together how we fulfil our purpose as a Quaker meeting. And we need to do this for reasons echoing the intention of that eighteenth-century query: so that we can become aware of “progress” in our meeting and attend to what is needed. A spiritual review is that opportunity. Unlike the factual report local meetings submit to their area meeting recording *what is (or was)*, a spiritual review explores what we think and feel about what is, discovers what was hidden, envisages what *might be* and takes a first step towards what *will be*.

This handbook offers guidance and practical suggestions on planning and carrying out a spiritual review for meetings to draw on in whatever way they find useful. It



includes a range of possibilities to help you plan a review process that will work for your meeting, and addresses common concerns and hesitations for those undertaking this exercise for the first time.

The guidance is based on research that involved reading over thirty spiritual reviews received from meetings all over Britain – meetings of every kind, from inner city to remote island, from four or five gathered for worship in a Friend's home to a hundred and more in a large, well-appointed meeting house. They are mostly local meeting reviews, with a few examples from area meetings. The first thing that stood out was how varied they were, and sometimes how varied they became from common starting points. This range of approaches to more or less the same task made it clear that each review process must be tailored to each meeting's circumstances, and that it would therefore not be helpful in this publication to recommend one particular model for meetings to adapt as needed. Another striking feature of the reviews and accompanying notes provided by meetings was Friends' concern to reflect on how things went, both to ensure they improve on their process for next time and to pass on their experience for the benefit of other meetings.

Receiving reviews and reflections from so many Friends and meetings was extremely helpful. This material provided valuable insights into how spiritual reviews have been conducted across Britain Yearly Meeting, greatly expanding the perspective of the author's own experience and prior research. The guidance offered here draws on this rich resource, together with observations of common threads in what worked well and what Friends found to be less fruitful. The following pages include quoted extracts from these reviews – on the understanding that neither Friends nor meetings would be named. Each extract indicates whether it is from a local or area meeting spiritual review.

Throughout the text, the term 'Friend' is used to denote both members and attenders of Quaker meetings. Where the reference is to elders, overseers and their respective or joint responsibilities, Friends will no doubt be able to translate this in terms of the particular arrangements for eldership and oversight in their own meeting.

# 1: Why have a spiritual review?

Meetings gave a number of reasons. Often they were responding to a requirement or expectation of their area meeting, which the local meeting confirmed by a minute – perhaps outlining a plan or a timescale. But meetings also had their own reasons and were glad of the prompt.

“The process started with a concern from one of our Friends about the nature of membership, in particular in relation to non-theists.” (LM)

“The spiritual review of our Area Meeting had its roots as far back as July 2005 when we recognised the difficulty of finding Friends to serve.” (AM)

“The need for a Spiritual Review... was prompted partly by the unexpected resignation of our resident warden and a growing awareness that this provided us with a real opportunity to assess how we care for our Meeting House.” (LM)

A spiritual review is relevant to any meeting, whatever its circumstances – long established or just getting on its feet, confident or troubled. Where a meeting is working well it is an opportunity for clear-eyed and optimistic appraisal and a chance to envisage fresh possibilities. For a meeting addressing difficulty or facing a challenge, a spiritual review can be an important step in finding constructive ways forward. We can certainly expect that a review will help Friends in our meeting become more aware – of each other, their meeting, their hopes and aspirations, the challenges they face, and their Quaker faith.

Reviews in the research sample give a consistent picture of meetings gaining from the exercise, often in ways they had not anticipated. Typically, a meeting starts out with the aim of gathering responses to queries designed to reveal what Friends feel about the spiritual life of the meeting and what should be done to deepen it. They then discover that in the process Friends get to know one another better and feel more involved with what goes on in the meeting, and that the community as a whole becomes more confident and optimistic.

Recognising these as potential outcomes will help a meeting plan a process designed to encourage this to happen, and will also be part of determining what other elements to include.

Why have a spiritual review?

The process has been described as “a meeting’s health check” and, like any other health check, its purpose is to raise awareness and lead to action. We hope that the process will be helpful to us all and will result both in a better understanding of strengths that we can build on and of weaknesses that we all need to take a part in addressing. (LM)

In most meetings there is no shortage of issues that can be usefully addressed in the course of a spiritual review, though it will be important to consider these not in isolation from, but as integral to our purpose as Quaker meetings. We also need to keep in mind our understanding of worship as central to everything we do. Whatever broad or more defined focus we decide on for our review, with these two essentials at the forefront of our planning we will maintain our attention on the meeting’s “spiritual life and its expression in caring”.

A further word about that key phrase from *Qf&P* 12.16: Friends recognise that the spiritual dimension is deeply implicated in everything they do to care for their meeting and each other, and equally that pastoral care includes care of the spiritual dimension. Although in many meetings elders and overseers have separate responsibilities, a spiritual review will benefit from giving practical expression to the interconnectedness of eldership and oversight through elders and overseers working together on the exercise.

# 2: Planning a review process

## Testing the idea

Each meeting will decide for itself how to go about planning, designing and undertaking its review, bearing in mind what it hopes to gain from the process and what it feels able to take on at this time. So testing whether a spiritual review is the right way forward for the meeting is the first step. The question might be raised first at a meeting for business; more usually, those responsible for eldership and oversight will consider it beforehand and send a minute from their meeting to the LM (or AM) clerk for the agenda. It will help the review get off to a sound start if a good number can be encouraged to attend the meeting for business at which the matter is raised; the sooner Friends feel personally involved the better. Elders and overseers might bring to that meeting outline proposals or suggestions for issues to consider in the review, or they might propose that Friends meet in another context to discuss ideas and possible ways forward.

What form should the review take? How can we give everyone the chance to be involved? How do we make sure the views of particular groups are heard? (LM)

We propose to have an extended Afterword on Sunday [date] to set the ball rolling. Please come if you are able to and contribute to thinking through how our Meeting can plan and carry out a review process that meets our needs and suits our particular circumstances. (LM)

## The planning group

Once the decision has been taken to go ahead, a certain amount of groundwork and advance planning will clearly be needed, and the meeting will consider which Friends or group should do this and how they will be briefed. In many meetings, it is a straightforward matter of asking elders and overseers to be responsible for the review.

Some meetings appoint a group of Friends for the task, which may or may not include those with responsibility for eldership and oversight. There may be advantages in drawing on other Friends with particular skills and experience, but it

will usually be appropriate for at least a few of the appointed elders and/or overseers to be involved in the planning group. This will ensure that planning takes account of their current knowledge and insights, and also that those in key roles in the meeting feel fully engaged.

There was some reluctance to engage with a Spiritual Review among some Friends – notably, to our concern, among Elders. This undoubtedly stunted the response in Local Meetings. None of the Planning Group were Elders at the time. (AM)

## Taking stock of the meeting

The planning group will need to hold in mind the nature of their meeting community – the demographic and other factors that may influence an approach to a spiritual review. If your meeting has experienced any significant changes in the last few years, this may not be as straightforward as it sounds. A ‘stock check’ of your meeting community might include all or some of the following:

- the meeting list compared with actual attendance
- age profile of those attending fairly frequently
- young people attending and arrangements for children and young people’s meetings
- known reasons for non-attendance
- particular needs and how these are met
- balance of members to attenders
- proportion of newcomers
- geographical spread and travel considerations
- factors to do with the meeting house or premises
- social groupings within the meeting (such as house groups or interest groups)
- relationship with other LMs and the area meeting
- involvement in the local community
- Friends active in the wider Quaker community
- pattern of eldership and oversight
- structures and appointments in the meeting
- burning issues in the meeting.

With your meeting ‘portrait’ in mind, consider how a review process might engage the whole meeting community and what outcomes you hope for. It will help to read

the complete handbook before making a start: **Section 3** and **Section 4** look at ways Friends might explore issues and engage with themes; **Section 5** addresses the later stages of reporting and what happens next. It will help your planning if you think about each of these stages beforehand so that you can take them into account in decisions made at the start. Discussing various possibilities will clarify your understanding of what the review is for and what the meeting hopes to gain from the process.

## Queries for the planning group

1. How will we arrive at a focus for the review? Will we decide this, or will we involve the meeting at the very start in this thinking?
2. How will we plan the process? How flexible will it be – how responsive to what emerges along the way? Will we involve the meeting in planning the process?
3. How might the review “be a form of pastoral care”?
4. How will we involve children and young people?
5. How will we ensure that those who attend rarely, for whatever reasons, are included?
6. How will we record what comes out of the review? Do we plan this now, or once the review is underway? What relative importance do we give to a) the review process, b) a record of the review, c) actions arising from the review?
7. How will we take things forward? What part might identifying or planning next steps play in the review?

## Timescale for a review

How and whether a meeting decides this at the outset may depend on any number of factors, including the time of year, other calls on the meeting’s attention, Friends’ availability, the kind of process planned and so on. But it will help to have an idea of how long the process is likely to take, and to say so in order for Friends to feel confident about what will be required of them. If you are able to draw up a review plan with proposed dates, so much the better. This can be subject to any necessary adjustments, with reasonable notice.

Three rules of thumb:

1. Friends need plenty of notice of dates and deadlines.
2. Those doing the work need more time than they ever anticipate.
3. The meeting needs ‘digesting’ time.

We should have started the process sooner and given more notice of the get-together. This might have resulted in more Friends attending. (LM)

Although Local Meetings were asked in May to conduct a spiritual review and the Area Meeting review did not start until September, the timescale was still a problem for some meetings. (AM)

Our committees were hard-pushed to deal with their responses; the Trustees generously gave time in their crowded agenda, Elders and Overseers did not have time to complete their discussion and Nominations Committee could not find any time at all. (AM)

## A whole-meeting venture

The planning group has a key role in making things happen, but needs to keep in mind the importance of maintaining good two-way communications and of drawing on the skills and experience of other Friends. The sooner you can involve the wider meeting, the more supportive Friends will be.

Encourage the whole meeting to have ownership of the process. For example, you may need to consciously avoid giving the impression that you will be seeking people's views and thoughts for *your* information or for *you* to act on. Be aware of how easy it is, unwittingly, to create a sense of hierarchy – of 'them' who respond to questions and 'us' who pose questions, receive responses, filter, analyse or summarise them and act on the findings. The aim should be to go about things in ways that will encourage all Friends to identify with the outcomes of the review and to feel motivated to be part of taking things forward.

Our Spiritual Review has identified important questions of community, worship and faith and suggests how these may be addressed. We urge all Friends to take these matters to heart and do what they can. Friends with an organising role in the Meeting, including Elders, can facilitate these efforts but can achieve little alone. Together we may achieve much in acting on the two principal questions... (LM)

At our area meeting in September the review team introduced proposals for conducting the review... Every step to be rooted in discernment and in worship; the whole AM will be involved and it will be an all-age activity; we will try to make it clear what each step will be, what it will require of us, why we are doing it and what the outcome will be... At that meeting

we also took our first steps. As Friends left the meeting we used flip charts to identify what we valued about area meeting and what disappointed us. (AM)

Members and attenders were also invited to a further meeting to discuss the specific issue of membership (yes, there were so many meetings but it was all very satisfying!) (LM)

## Involving children and young people

For many meetings there are two aspects to this:

1. How to involve those who attend meeting.
2. Seeking the views of children whose parents attend, but who do not themselves attend.

1. If you have a children and young people's meeting, the Friends responsible or involved in organising this should be consulted at an early stage on ways younger people in the meeting can engage with the process and contribute their views, ideas and suggestions. Consider writing personally to each child and young person letting them know what is going on and giving dates and an invitation to events that will involve them. Meetings to which all adults are invited should ideally include opportunities for all-age activity as well as activities suited to younger Friends. You may need to offer crèche facilities too.

2. The review might usefully address the question of why children of attending parents do not attend. They may not be interested; they may be busy with other activities; they may have tried it for a while and not enjoyed it; the meeting may not feel in a position to offer a children's meeting (or not often enough for the children's meeting to thrive); parents might feel their children would not be welcome. Until you ask them – and their parents – you cannot be certain. The review is your opportunity both to find out and to consider how you might develop your provision.

## Anticipating problems

One way of looking at what a meeting undertakes in conducting a spiritual review is that it involves taking risks. Friends will be asked to look closely at their meeting, warts and all. They may also be asked to reflect on their own spiritual lives – why they come to meeting, what they get out of it, what their meeting community means to them personally.



The research sample reviews show that Friends are a robust species on the whole; they look at things squarely and find much to celebrate alongside the inevitable difficulties and setbacks in the life of their meeting community. However, for some Friends, the reflections that a spiritual review encourage may disclose discontent or strong feelings that upset them and perhaps other people too. If we are prepared for this possibility, we will address it more helpfully. Whether part of the planning group or not, those responsible for eldership and oversight should be included in discussions about topics for the review, and consulted on how to ensure a ‘safe’ context for any particularly sensitive matter they feel it would be right to address (see **Section 4**).

You may find that not everyone welcomes the prospect of a review, despite a decision agreed at meeting for business. There may be a good deal of listening to be done at the outset to reassure doubters, and in the end, some Friends may simply choose not to participate.

We felt that it would be really helpful to find out negative as well as positive feelings. In doing this, we should encourage people to take responsibility, as members and attenders of the meeting, both for any problems and any ways of tackling them... We decided to start the review with two meetings. We would encourage everyone who can to attend one of them. (LM)

Some local meetings experienced conflict with the conduct of their own spiritual review. (AM)

You will find helpful guidance on matters of conflict in *Conflict in Meetings* (see *Resources*, page 33).

## Confidentiality

Plan how you will address confidentiality during your review. There are a number of elements to this, including Friends making anonymous contributions if they wish and how confidentiality is respected in group sharing. These two considerations are addressed in **Sections 3 and 4**.

An aspect of confidentiality that is less straightforward to plan for is the possibility of difficulties arising from receiving information relevant to the review that is given in confidence. For example, a Friend might seek to entrust someone (such as a member of the planning group) with a concern, complaint or criticism in the expectation that they will do something about it on the Friend’s behalf. Clearly any action you take will depend on the nature of the confidence, but be aware of the danger of being

drawn into 'sides' on an issue. You should also consider whether or how information given to you is noted or shared in any way. If in any doubt, seek appropriate advice. For further guidance, see the leaflet *Confidentiality* published by Quaker Life, which includes this key piece of advice:

If you are asked by an individual to keep a matter confidential you should not agree unconditionally. At the outset you should request permission to extend the confidentiality if you discern it necessary. You may find that you are unable to carry a confidence alone or others may need to be informed because a third party is at risk. We should remember that most of us are not trained counsellors. A confidence can be an unbearable burden.

# 3: Asking the right questions

Questions tend to form the backbone of a review and will be referred to repeatedly – in any letter sent, in meetings and discussions, in a written record of the review, in minutes and in plans for action. So it is important to get them right.

## Notes on framing questions

### Factors that affect what we ask include:

1. the *issues* or themes to be addressed
2. the *purpose* of the questions, for example to gather data, or for reflection and/or sharing
3. how Friends *receive* questions, such as at a distance (letter or email) or during a meeting of some kind
4. how Friends *respond*; either in writing or verbally, and whether confidentially or to be shared
5. how responses will be *received and used*, for example analysed, summarised, published in full or discussed in a group.

### Questions for sharing together

Questions asked in this context can feel challenging in the second person (you) and distancing when expressed in the third person (they). It can help to use the first person – either singular or plural:

- What is my experience of meeting for worship?
- What do we value in our meeting?

Where it feels right to use the second person in a question for sharing it might be better to frame it as an invitation or request:

- Please share something of your experience of meeting for worship.

### Questions to think about or respond to at home

These need particular care: once they have been written and sent it is not easy to clarify things that have been misread. Asking Friends what they experience as positive is always useful, as are neutral questions. When asking about what might not be good, avoid questions that seem to imply problems or invite negativity.

Consider questioning on the following lines instead:

- How well do we support and inform newcomers?
- How inclusive is our meeting?

Another option is to ask forward-looking questions, which carry the message that things lacking or less good can be addressed:

- How can our meeting develop the ways we include children and young people?

### Some Dos and Don'ts

- Use 'open' questions: *What are your hopes?*  
Avoid 'closed' questions: *Have you any hopes?* (If you can answer Yes or No, it is a closed question.)
- Ask impartial questions: *How might we increase meeting funds to support our growing needs?*  
Avoid 'leading' questions: *What steps have you taken to adjust your charitable giving in line with inflation?*
- Keep questions simple and unambiguous: *What do you value about X Meeting?*  
Avoid complex and double-barrelled questions: *What three things are most important to you about X Meeting and what could be done to improve meeting for worship and/or the meeting generally?*

### Appreciative Inquiry

**Appendix 2** gives examples of questions framed for a particular model of exploration based on the principle of appraising what is good and building on the positive. Many meetings considering change or wanting to find direction have used Appreciative Inquiry and found it a very useful tool. It is particularly suited to the process of a spiritual review.

### Questionnaires and the like

...a meeting might like to compile and use a series of queries for this purpose. (*Qf&p* 12.16)

This advice can be interpreted as a suggestion to devise and work from a questionnaire. Asking Friends to respond to questions on a number of issues can be effective in generating a lot of information on how Friends view their meeting, the problems they perceive and their suggestions for change. On the other hand, it may have the unforeseen effect of raising a scattered range of concerns that cannot all be addressed, or even acknowledged, within the scope of the review.

Should you consider using a questionnaire, think carefully about what you intend to do with all the data this will create, how you will analyse it and how useful the findings will be to the meeting. Devising and using a questionnaire can be rather a special skill; perhaps there is someone in your meeting with relevant experience or knowledge. You might consider trying out a questionnaire on a few people (piloting) and amending it if necessary. You could also check the internet for information on the advantages and disadvantages of questionnaires.

It became clear that there were too many questions. There were comments that the process was over-bureaucratic. (AM)

For some inexplicable reason we did not pilot the questionnaire. Some of the problems that we encountered could have been avoided if we had done so. (AM)

The way Friends answered the questionnaire showed that the questions were to some extent creating arbitrary distinctions. (LM)

Whether you send Friends a questionnaire with a range of questions, or a letter with a few broad queries inviting more expansive written responses, bear in mind that any request for a written answer has both pros and cons.

On the plus side, you are giving Friends a valuable opportunity to say things they might not find easy to express in person. The right questions can elicit very thoughtful, and frank, written responses that might not emerge any other way. A drawback is that when writing on their own, perhaps even anonymously, Friends are not in touch with others on matters the questions raise, as they would be if they were in conversation, sharing in a group, or gathered in worship. They cannot reflect on their viewpoint in the light of what others say, nor contribute to the thinking others are engaged in. It is rather like attempting corporate discernment by email (or by letter) – and with no ‘Reply to all’ function.

However, when used *in addition* to meeting together for discussion or other forms of group sharing, gathering written responses can be a useful part of a review process. A review might start by considering one or two broad themes, and then look at more specific issues arising from the earlier reflections, with written responses forming an optional or additional part of either stage.

Whatever approach you decide on, the first questions, and the context in which they are posed, will be key to how the review process unfolds in the meeting. If the circumstances in your meeting mean that inviting written responses will be the main or only method you use, try asking a small number of fairly general questions that allow people to respond in their own way and expand if they want to.

## Engaging with questions

...the process might start in small groups, in which unmet needs could be revealed and confidentiality respected, then move on to an occasion drawing all together. (*Q&A* p 12.16)

Where meetings made arrangements for considering questions in some kind of sharing activity, they found that Friends valued these opportunities, particularly if there was a chance to spend time with a few others in a relaxed setting. These and other ways of exploring together contributed greatly to building community and strengthening relationships. However, we know that not everyone will attend groups or meetings. In order to include those who could not or chose not to, most meetings used more than one method of involving people in the review, sometimes offering a choice and sometimes inviting people to contribute in as many ways as they wished.

Some twenty-two Friends took part in the three worship sharing groups with someone appointed to take notes in each case. Eight written submissions were received and six one-to-one interviews took place. (LM)

## Ways of bringing Friends together and/or speaking in person

*(used by meetings in the research sample)*

- Writing to everyone connected to the meeting informing them of a first review get-together, sometimes enclosing questions and inviting optional written responses (**Appendix 1** offers an example).
- Holding a series of after-meeting sessions over a period of time.
- Using 'Afterword' for reflecting on questions.
- Holding a number of smaller group meetings in different Friends' homes (spread widely).
- Suggesting Friends meet with just two or three others to discuss questions and respond jointly.
- Arranging one or more special meetings at times most likely to attract good attendance.
- Making visits or phone calls to non-attending members or ex-attenders, including those who feel estranged and those who for any reason cannot attend meeting.
- Using some time on a meeting residential weekend.
- In larger meetings, using existing oversight groupings (lists, circles, etc.) for review discussions.
- Inviting meeting committees and/or existing study groups or house groups for their responses.

- Arranging for Woodbrooke-on-the-Road to lead a review day event.
- Arranging through the Quaker Life Network for experienced Friends to facilitate an event to start off the review process.

### **Ways for groups to engage with questions or prompts**

*(some examples quoted from sample reviews)*

We gathered over a simple lunch after Meeting. The [four] themes below were written on posters on the walls [plus one headed Other Comments]. People talked at the tables and wrote positive comments (on yellow sticky notes), and suggestions for improvement (on blue ones), then stuck them onto the relevant posters. (LM)

A long sheet of paper was attached to the wall and Friends were asked to spend some time over the weekend to write our story as we know and remember it. On the Sunday morning we met to look at what we had written and we spent some time in worship sharing reflecting on what our story told us about ourselves and why the events were significant. (AM)

We decided a Threshing Meeting was appropriate... The Threshing Meeting was asked two questions, which we felt would open up the subject and encourage people to talk from a personal perspective. (LM)

In the 'house meeting' – in 'worship-sharing' mode – those present shared their thoughts and feelings. We kept notes of what people at the meeting said. (LM)

We put up two flip charts on the day to remind ourselves what we had done as a meeting over the last year or so and what other bodies, both Quaker and non-Quaker, we take an active part in supporting. (LM)

Working in groups, Friends produced collages representing their vision of area meeting in ten years' time and the journey that we should undertake to get there. (AM)

Suggested outline for first spiritual review session:

- explain purpose of review
- explain background – process
- explain that this meeting [is] to start the process

- introduce the questions we will be looking at (I will bring these in large print so that we can put them on the table for everyone to see)
- explain that we will be looking at some of these in two creative listening 'rounds' and that we will then have a more open discussion looking at possible action the meeting as a whole could take.

(LM)

## What to do with responses

Most meetings felt it important to record what Friends said at review events or meetings and to gather up everything Friends wrote. This will certainly be very interesting material, but you might wish to question whether *everything* needs to be analysed, published or kept on record. This is discussed further in **Section 5**, which considers ways of reporting the outcomes of a review.

The production of lots of individual contributions (and the problem of what to do with them) might be avoided if the activity inviting responses includes small groups distilling ideas and agreeing a group response. This can apply to larger groups too – think of the way a meeting for worship for business arrives at the sense of the meeting resulting in an agreed minute. Good discernment does not water down ideas, but brings clarity and sometimes points us in unexpected directions. By approaching group activity in this way, Friends are taking their initial thoughts and ideas one stage further by allowing them to develop and change, and one step nearer to deciding as a meeting how to move the review forward into action.

## Reaching out and reaching in

Special attention might need to be given to involving those associated with the meeting who take little part in its regular life because of youth, age, disability or disaffection. (*Q&P* 12.16)

Meeting the needs of those unable to attend for various reasons might include arranging a personal visit or holding a small group meeting in their home. In the case of ex-attenders or non-attending members, the review might prove to be a way of catching up on overdue efforts to make contact. These Friends could be invited to attend group meetings, to respond in writing or offered a visit.

We also need to think sensitively about Friends who tend not to join in. Meetings and groups are not everyone's choice: some people distrust their own ability to be honest in a group; or feel silenced by dominant voices; or feel unheard when they speak. To meet possible need, some meetings offer the option of a private conversation. These can make a useful contribution to a review in enabling such Friends to be heard,



and perhaps also the Friend who is uncertain that others will find what they say acceptable. The lone voice might turn out to be the voice we really need to hear.

Although you might discover a limited need for private conversations, there are other ways to consider of making opportunities for confidential sharing or anonymity, which are more in keeping with an intention to build community. The various **ways of bringing Friends together** listed on page 15 include several possibilities, and **Section 4** offers some ideas for activities in larger group or whole-meeting settings, which respect confidentiality, encourage honesty and participation and include opportunities to contribute anonymous comments. A spiritual review will do more towards strengthening community where the process explicitly and implicitly expresses the value of openness and connections, as well as the principle of inclusion.

Our Meeting sustains many and diverse groups, greatly valued by their members. Yet some Friends are sad that they feel no part of this, or the larger community. Our challenge is to ensure that our groups contribute not only to the strength but also to the unity of our community, and do not allow a sense of exclusion to develop. (LM)

# 4: Responding in group settings

Meetings commonly include in their review process at least one occasion when Friends gather to share responses to questions – either provided in advance or posed on that occasion. Sharing is often done in creative listening or worship sharing, which are fairly straightforward to facilitate and can be used effectively with largish groups.

However, with groups of more than a dozen or so these methods used on their own do not lend themselves to developing ideas or considering different possibilities. Neither are they especially easy for Friends who find group sharing a problem.

Where whole-group sharing is the main or only activity in a review meeting, notes might be taken of what Friends say, possibly adding to a Friend's reluctance to speak. Breaking into smaller groups for discussion at times can help, though some Friends don't find it easy to contribute in free discussion either.

Below are a number of suggestions for additional ways of sharing that address these drawbacks. Activities of these kinds are particularly useful as part of a session that also includes everyone gathering at the start and again at the end, perhaps for a period of whole-group sharing, reporting back or drawing threads together.

## Example activities

NB. Always inform Friends at the start that they have the option of not speaking, or passing on that occasion, if they choose.

### 1. Pooling responses

Display flip charts headed with different questions around the room. Friends respond on separate sticky notes to place on the charts. Small groups each take a sheet away to read the responses and open up discussion or creative listening on that question. They agree a group response for the plenary.

### 2. Silent thought shower (brainstorm)

Clear the floor space and place in the centre a question printed on a large sheet. In silence throughout, write as many responses as you like in marker pen on A5 sheets and place on the floor to be read from standing. Move around during the activity to read the responses and add further thoughts arising. Friends rearrange responses if they wish, grouping similar points together. Optionally, settle into creative listening around the written responses.

### 3. Discussion in stages

In small groups, take time in silence to reflect on and/or write a response to a question. In turn, each person either speaks to the question or reads out their response. In discussion, share further thoughts arising. Agree and record a group response for the plenary. Repeat for further questions.

### 4. Pairs and fours

Start responding to a question in pairs – five minutes each to speak. Partner listens. Each pair then joins another to share their thinking – in turn or through discussion – and agree on what to record for the plenary. Find a new partner for each further round.

### 5. Ideas café

Friends each write an idea to offer or a question to ask. Take turns in groups of three or four to share these, others responding from their perspectives. At the end of that round (15 minutes or so) one person in each group stays seated (same person each round) while the others separately join different 'stayers'. In new groups, Friends explain their idea or pose their question again. Repeat until you run out of time or new people to meet. Reflect in plenary on what you learnt.

There are various participative activities of this sort you could try. In most meetings, there will be at least some Friends who have worked in these ways on courses or in groups, who could perhaps become involved in devising activities appropriate to your circumstances.

## Facilitating

Participative activities are not difficult to organise, but in most cases they call for a certain amount of facilitation. Friends who take this on need not be experienced facilitators, but it does help to be sure you understand how something is supposed to work, and to feel confident that Friends will forgive you if it does not!

**Appendix 3** offers basic descriptions of various ways of working in groups. If you plan to include activities of this kind in your review process, think through the best ways of using the available resources in your meeting:

1. Which Friends in your meeting have skills or relevant experience to offer? If possible, involve Friends who are not members of the planning group, or elders and overseers.

2. Give plenty of time for a session that includes more than one activity, for instance an exercise as well as a plenary, and maybe more. Consider perhaps two hours as the minimum.
3. Think about the spaces you will use. Is there room for people to spread out in small groups or pairs? (A meeting room full of benches is not ideal, so some furniture shifting will be called for.)
4. Consider any particular needs of Friends, such as hearing, sight, mobility.

## Confidentiality in group work

For Friends to feel OK about sharing in pairs or small groups, it has to be explicit that everything is confidential, unless the Friends concerned agree otherwise. In practice, this means that when pairs join up with others, for example, each person speaks only for themselves; they do not repeat what their partner said. This way they can each refer to anything they spoke about together, but only their own part.

Similarly, when speaking in plenary after sharing in a small group, each person speaks only about what they said, unless the group has agreed otherwise. The group's task should include agreeing what to report back. It should also be made clear that if anyone is concerned about something they said remaining confidential, they should say so to their group or partner.

# 5: Reporting and taking the review forward

## Making a written account of the review

The research revealed three main ways that meetings approached this task (with some overlap in many examples).

1. The complete and anonymous record of everything everyone has said is brought for discussion at a meeting for worship for business, sometimes with a short summary commenting on the range of responses and identifying the main points under each question heading. That meeting draws conclusions on where the review leads next and perhaps also takes decisions on action.
2. The findings, proposals and conclusions reached in the course of one or more review meetings are compiled into a written statement or minute serving as an expression of the sense of the meeting. Verbatim or summarised responses may also be attached. The statement may be circulated to all Friends as a draft for comment before being finalised and brought to a meeting for business.
3. The planning group, elders and overseers, or one or two appointed Friends analyse the full set of responses. They then write an account of the review summarising their findings and perhaps quoting (anonymously) from example responses. This written record may also either pick up on particular suggestions for ways forward for the meeting or make proposals based on conclusions reached by those involved in its preparation.

In each approach, writing an account drawn from Friends' engagement in the process expresses the openness of the review and the value attached to all the responses received or contributions made. The key difference is that in the first two approaches making findings and drawing conclusions is done corporately, while in the third approach that task is delegated to appointed Friends.

Where the task is delegated, care needs to be taken in the writing to keep within the sense of what responses and contributions are saying and where they are leading. There

can be a fine line between conveying insights arising from the review and expressing opinions. Be aware of when you are interpreting findings from the perspective of, say, eldership, and make it clear wherever you offer that perspective.

The appointed Friends' written account will then come to a meeting for business for its discernment. This is the stage where the meeting reasserts its ownership of the review and, we hope, accepts it as a sufficient record of the review process and an appropriate expression of the meeting's hopes and intentions for the future.

The review process has not been systematic and we are unable to report figures or statistics. It has, however, been an opportunity for us all to learn, listen and try to discern the leadings of our meeting. (LM)

In what follows, after the indication of common themes, we give the responses really under what we **like** about meeting, what we **don't like**, and what our **recommendations/hopes** are for a better meeting. (LM)

We present our analysis in a work-in-progress format to highlight our awareness that the review is an ongoing process. We hope to hold a feedback session for the meeting in March. (LM)

We reflected on boundaries of personal energy, the potentials within our own human resources and how we balance them with obligations beyond our Meeting. We want to explore each other's gifts and potential contributions in our community of worship. We also appreciate the input of Friends from beyond our local meeting. We need to look at our areas of priority to enable us to spend our available time in deepening our worshipping community together. (LM)

## Where next?

A meeting undertakes a spiritual review not only to appraise how things are, or have been, but hopefully also to help it develop. A review can help us decide how that happens. The process therefore needs to express a sense of direction and to encompass planning, decision-making and action in addition to reflecting, gathering ideas and making suggestions. A possible framework for implementing development or change in a meeting is offered in the latter stages of the four-stage process of Appreciative Inquiry, outlined in **Appendix 2**.

In approaching this phase of your review, bear in mind that any change – however desired, necessary or agreed – will feel unsettling, especially at the start, and may well

prompt stronger feelings of upset in some Friends. We tend to like things to stay just as they are. However, we are a changing Society, and we know that our meetings are inevitably changing all the time in ways that demand our attention and our action if we are not simply to drift.

Just as this handbook recommends involving the whole meeting from the earliest stages of the review, the advice for later stages is to give the same priority to involving Friends in the planning of change and how decisions will be acted on. You will be aware that all change requires a period of adjustment and that where Friends are consulted and involved in bringing about change they find it easier to adjust. This is particularly true of major change in the life of a meeting, which is harder to adapt to and brings more likelihood of setbacks in how Friends feel about the change.

## The review cycle

For most changes or developments planned, it is helpful to set a timescale with a date for reviewing how things have gone so far. Review is a cyclical process that will be repeated in due course, each time looking back on the previous review and in turn reviewing progress since then.

We see 'Spiritual Review' as an ongoing process which should nourish our spiritual lives and bring us closer together. (LM)

One meeting in the research sample considered how it would report on the spiritual life of the meeting since its last review and concluded that, as the meeting had engaged in continual review since then, it did not need to mark a further cycle with either more meetings or more enquiries. Its continual review had revealed the meeting's greater need for a period of settling and calm.

At a joint meeting of elders and the oversight and pastoral care team we looked back again at the 2007 review. We appraised the period since then... We have run two fellowship meetings, one on the theme 'Deepening Fellowship' and the other on 'Communication'... After the first fellowship meeting, based on what people had expressed, elders and overseers began regularly to identify and review what we would attempt to do in the short term, medium term and long term. We have continued to review this regularly, being careful each time to select and attempt only what we felt were currently manageable goals. (LM)

# 6: Drawing threads together

## Summary

A spiritual review is a fulfilling undertaking, offering us a rich opportunity to be more closely in touch with one another on our varied spiritual journeys. It is also a complex undertaking because Quaker meetings are complex. Our witness to simplicity is rarely reflected in how our meetings work as communities, or the diversity of faith and other perspectives they embody, or the range of wider involvement and witness Friends are engaged in. All these distinctive features of Quaker communities affect Friends' approach to their Quaker faith and their hopes for their meeting. This handbook has therefore needed to cover a lot of ground in seeking to help meetings in their task. Below is a reminder of the main points addressed:

### 1. Why have a spiritual review?

Meetings invariably gain from the exercise – whatever their circumstances. The process is at least as important as the outcomes of a review.

### 2. Planning a review process

A review process needs careful planning at the outset as there is a lot to take into account. The role of the planning group is key. Fundamental to the good working of a review is the thought given to ensuring that the whole meeting is involved and to the ways Friends engage in the process.

### 3. Asking the right questions

The questions that make up the backbone of the review need to be considered and drafted with care. It matters how Friends receive and are invited to respond to questions. There are pros and cons to using questionnaires. A small number of open-ended questions can be effective. Bringing Friends together to explore questions, ideas and proposals will make a significant contribution to a review.

### 4. Responding in group settings

Worship sharing, creative listening and discussion each have a part to play. Using other ways of working too can enrich review meetings and meet the needs of Friends not keen on whole-group sharing. Facilitation will be required for some activities; a bit of confidence is often all that is needed to fulfil this role.



## **5. Reporting and taking the review forward**

There are three basic approaches to a written account of a review. It is important for the whole meeting to feel ownership of the final record. The later stages of planning, decision-making and action should not be overlooked. Change is always unsettling; Friends need to be as involved in making changes as in reflecting on whether they are needed. The review process is cyclical and progressive, each review reflecting on the last and on the developments since then.

## **Conclusion**

A spiritual review will be a more or less demanding exercise depending on your meeting's circumstances. An area meeting review is likely to be particularly occupying of time and resources because of looser connections between Friends and the differing circumstances in local meetings. At the other end of the spectrum, a review can be a relatively straightforward process – perhaps conducted on a single occasion – which simply provides a focused opportunity for fellowship and the impetus to take a fresh look at how to move forward as a meeting.

Wherever a meeting is on that spectrum, by listening to the promptings of the Spirit in all their discernment, plans and action, Friends can ensure their spiritual review fulfils its intended purpose of helping the meeting to develop, and of being part of what sustains them in building a shared and hopeful vision for the future.

This review is not the end but a beginning, a new beginning of a gradual development of new ways of working. We need to keep the recommendations in our thoughts and prayers as we continue to work together in the Spirit. (AM)

# Appendix 1

## Sample letter

Dear Friends,

Elders and overseers met recently to consider how the meeting might undertake a spiritual review. It is five years since our last spiritual review, during which time the meeting has undergone many changes. It now feels timely to carry out this process again.

As some of you will recall, a spiritual review involves all of us, members and attenders together, reflecting on the life of our meeting. As a meeting we are able to design our own process and decide what we would like to focus on. Elders and overseers feel that the purpose of the review this time could be to discover who and where we are now as a worshipping community, to clarify our priorities as individual Friends and as a meeting, and to gain a better understanding of our role as a local body of Friends in the wider picture of British Quakers. We propose that the review happens in a spirit of open exploration involving everyone in our meeting of all ages, including Friends who rarely attend for whatever reason.

We also hope that in the course of this exploration we will get to know one another better, so we anticipate that the process of the review will include a variety of ways of engaging with ideas and with each other. These might include:

- meeting up for discussion or worship sharing on a particular topic, for sharing reflections on a query, or to tell our individual stories
- opportunities for making written responses to questions or queries
- undertaking activities together.

The review may produce some record of our collective thinking and intentions, but we feel that for Friends to engage with the review process will be a valuable outcome in itself. We envisage a whole-meeting undertaking for the benefit of the whole meeting.

### **Making a start**

We propose to have an extended Afterword on Sunday [date] to set the ball rolling. Please come if you are able to and contribute to thinking through how X Meeting can plan and carry out a review process that meets our needs and suits our particular

circumstances. During that Afterword Friends will be invited to start by considering the following question:

**What is my connection with meeting for worship – what keeps me attending, or what prevents me?**

You might also like to contribute written thoughts on the same question, whether you are able to attend on that Sunday or not. Please either bring these with you, or send them to any elder or overseer at their email or postal address overleaf.

In Friendship,

# Appendix 2

## Appreciative Inquiry

*Appreciative Inquiry* is a way of planning an approach to development and change. The '4D' process, which takes us in stages through *Discover*, *Dream*, *Design* and *Deliver*, can increase our awareness of what is good and hopeful in our meeting, help us imagine possibilities for the future, and prompt us to find means of building on these, possibly in unexpected directions.

The process focuses on questions framed in ways that invite us to respond positively (we can generate these questions ourselves). The first questions encourage us to recognise and value our present and past achievements, our strengths and our potential, including our ability to respond to difficulty. We then reflect on what we really aspire to as a meeting community, or in a particular area of meeting activity, and think creatively in our search for practical ways of realising our hopes.

Appreciative Inquiry works through everyone sharing in the process, through seeking accuracy and clarity about how we are at our best, and through releasing imaginative thinking. The idea is not to leap to solutions, but to arrive at decisions on action by building on ideas and exploring achievable possibilities together. This is a very different approach from one that concentrates on analysing problems and seeking ways to solve them.

We can compare these two approaches, and decide which will best suit our circumstances, by looking at typical questions we might ask.

### **Problem solving** *What do we want to see less of?*

- What things are not working well in our meeting?
- Why did things not turn out the way we hoped they would?
- How can we avoid getting it wrong again?
- What must we do to solve this problem?

*Our meeting as a problem to be solved*

### **Appreciative Inquiry** *What do we want to see more of?*

- What are the things that work really well in our meeting?
- How would we like things to be in our meeting?
- What is the smallest change that could have the biggest impact?
- What would getting it right look like?

*Our meeting as a possibility to be realised*

## Using Appreciative Inquiry to explore our meeting

The example '4D' stages outlined below are for exploring in sequence in a facilitated group setting. The questions are *examples only* of the way we can approach thinking about our practice by affirming and building on what we are good at, including the way we address difficulty and challenge.

### 1. Discover: *Valuing the best of what is*

What is our meeting like at its best?

- What is special or valuable about our meetings for worship?
- What is good about the way we encourage Friends to deepen their understanding of the Quaker way?
- How do we positively express welcome and inclusion?
- What does our meeting excel at? What has it excelled at in the past?

### 2. Dream: *Imagining what might be*

What is our ideal for the future?

- What would it take for everyone in meeting to experience real fellowship, spiritual nurture and Spirit-led pastoral care?
- What ideally do we want to see happening in the way we make decisions and how Friends participate in the Quaker business method?
- How would it be if our meeting was truly active in "Creating the Kingdom of Heaven on earth"?

If ideas emerging at this stage feel too fantastical to be do-able, it can help to continue the creative 'dreaming' by introducing some questions that invite people to home in on the possible:

#### *Identifying what could be*

What possibilities for the future can we envisage?

- What is the smallest change to the way we do things now that would have the biggest impact?
- Is there one aspect of our meeting that should take priority? How might that aspect be different in the future?
- What particular possibility in our meeting offers the most promising potential for development?

**3. Design:** *Defining what should be*

How could these possibilities happen?

- What would putting one of these possibilities into practice look like?
- What positive changes can we make to bring about our imagined ideal?
- How can we build on what works well in the way things are now?
- How else might the aims of this possible change be achieved?

**4. Deliver:** *Planning what will be*

How will we implement the change?

- What processes will help? What will our first actions be?
- Who could do what, and who else needs to be involved? How will those involved be supported?
- When is it realistic to get started, and what timescale, including a date for evaluating change, might we propose?

# Appendix 3

## Ways of working in groups

### **Creative listening:**

A way of speaking in a group without commenting on what others say. One person speaks at a time, either round the circle or in any order as led. Allow enough time for a few minutes each with pauses between contributions.

### **Worship sharing:**

A more reflective, more Spirit-led version of creative listening. It needs a good amount of time with more opportunity for silence after each contribution.

### **Go-round:**

Like creative listening but shorter – a minute or so for each person at the most. Consider having a go-round before sharing through discussion.

### **Working with a partner:**

Partners take turns to speak and listen in response to the question. Five minutes each is the minimum needed for sharing in any depth; ten minutes each feels more spacious. Emphasise the role of the listener.

### **Discussion:**

In a group of more than seven people, divide for the main discussion, then share key points in the group. Aim to keep a balance between those with a lot to say and those who find speaking in a group less easy.

### **Thought shower (brainstorm):**

Encourage a free-flow of lots of thoughts and record everything offered on a flip chart. When ideas slow down, group similar contributions together, or prioritise, depending on your purpose.

### **Silent thought shower:**

This version is explained in the **Example activities** section on page 19. A similar exercise uses sticky notes on a flip chart, but you lose the advantage of being able to read contributions at a glance.

# Appendix 4

## Resources

For guidance, information and a wealth of ideas on ways of working in groups

- *Becoming Friends: Living and Learning with Quakers. Preparing to be a companion* handbook. Developed for Quaker Life and Woodbrooke Quaker Study Centre by Ginny Wall, 2010.
- *Being Quaker, Doing Quaker*. A learning resource drawing on the Quaker Life Faith and Practice Conference 2010. Quaker Life, second edition, 2012. Each local meeting has a copy. Available to download: [www.quaker.org.uk/being-doing](http://www.quaker.org.uk/being-doing)
- *Creating Community: Creating Connections*. Yearly Meeting Gathering learning materials, Lizz Roe and Zélie Gross, 2009. Each meeting has a pack of three sets. Available to download: [www.quaker.org.uk/ymg-2009-creating-connections-pack](http://www.quaker.org.uk/ymg-2009-creating-connections-pack)
- *Hearts & Minds Prepared Facilitator Handbook*. Woodbrooke Quaker Study Centre, 2003. This is part of the pack still available in most local or area meetings.

Other publications helpful to planning a review process

- *Confidentiality*, a leaflet published by Quaker Life, second edition, 2008.
- *Conflict in Meetings*. Second edition. Volume 4 of the Eldership and Oversight Handbooks, 2005.
- *The Spiritual Hospitality Project Report*, Meeting of Friends in Wales, 2003.
- *Quality and Depth of Worship and Ministry*. Volume 5 of the Eldership and Oversight Handbooks, 2001.







*A spiritual review is a fulfilling undertaking, offering us a rich opportunity to be more closely in touch with one another on our varied spiritual journeys. It is also a complex undertaking because Quaker meetings are complex.*

Part of the Eldership and Oversight handbook series, this new volume is a practical guide to planning and carrying out a 'spiritual review' of a Quaker meeting. This book offers a range of possibilities to help Friends design a review process that will work for their meeting, while addressing common concerns and hesitations for those undertaking the exercise for the first time.

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