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**THE IMPLEMENTATION OF AN APPRECIATIVE INQUIRY-FOCUSED
STRATEGIC PLANNING IN A BAPTIST CHURCH**

**A Research Project
Presented to the Faculty of
The George L. Graziadio
School of Business and Management
Pepperdine University**

**In Partial Fulfillment
of the Requirements for the Degree
Master of Science
in
Organization Development**

**by
Akpene Ama Atiedu**

August 2012

This research project, completed by

AKPENE AMA ATIEDU

under the guidance of the Faculty Committee and approved by its members,
has been submitted to and accepted by the faculty of The George L. Graziadio
School of Business and Management in partial fulfillment of the requirements
for the degree of

MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

Date: August 2012

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Abstract

Strategic planning has become a viable process for many organizations over the last 60 years and is quickly becoming a common practice in faith-based organizations. Appreciative Inquiry as an approach to strategic planning has been found to be useful in organization development and change (Stavros, Cooperrider, & Kelley, 2003). However, few studies have looked at the application of an Appreciative Inquiry-focused strategic planning process in faith-based organizations.

The purpose of this action research project was to design and implement a strategic planning process in a church using an Appreciative Inquiry approach. A triangulation of research methods (survey, direct observations, and interviews) was employed to describe and assess the impact of the Appreciative Inquiry-focused strategic planning process.

The process resulted in a completed strategic planning document which captured what was working well—such as the church’s historical status in the community and warm environment created by the membership to reach its goals of equipping the saints, engaging the community, and enlarging its territory. Another result of this study is that the Strategic Planning Committee remained engaged and excited about the planning process even after the completion of the planning document. Lastly, Friendship Baptist Church has become a planning church committed to thinking strategically about the future.

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Chapter 1

Introduction

The church is often seen as a place of worship, a sanctuary from the chaos of the world. However, the church is also an organization. It is from this lens that one researcher stated,

As an organization a church has form, structure, a mission to perform, clientele, constituents, programs, a way of doing business, financial systems, a corporate culture unique to that particular organization, and many other characteristics of any organization whether secular or sacred. (Agee, 2001, p.11)

Similar to other organizations, the church is not immune to dealing with an ever-changing environment and must learn to be agile and adapt.

Problems Facing the Church

Churches face many of the same problems that plague for-profit organizations, such as financial hardships, loss of clientele (members), and low engagement. Studies have noted the decline in today's churches (Chaffee, 2005; Malphurs, 2005). While the Gallup Poll reports that 43% of Americans say they seldom or never attend church, others believe that the growing number of the unchurched could be as high as 80% (Gallup, 2009; Malphurs, 2005). Yet, others argue that American churches have made strides in achieving their mission of discipleship, citing research that showed an increase in church membership over the last two centuries, with church adherence going from 17% in 1776 to 62% in 2000 (Finke & Stark, 2005, p. 23). However, attendance in church is not the only indicator of an effective church. Church growth does not necessarily equate to the engagement of parishioners, for example.

Church leaders are challenged to inspire and encourage members to be active participants in the church and not just pew fillers. In an article by Agee (2001) on leadership in the church, he recalled the frustrations of some pastors he counseled. He stated, "Conversations with hurting pastors revealed that they wanted to lead the church to do more, and it seemed they did not know how to get them to do what they wanted them to do" (p. 8).

Statement of Need

Need for visionary leaders in the church. Churches are in need of visionary leaders. An article by Ward (2000) described a visionary leader as someone who has the "ability to imagine God's future and to cast the vision of how God's future and the giftings of a particular community can meet" (p. 170). Effective pastoral leadership has the potential to ". . . draw the church into deeper engagement with the world and more effective proclamation of the gospel" (Britton, 2009, p. 101).

Need for strategic management and planning in the church. To navigate through the ever-changing environment, a church, like any other organization, needs the tools to map out a plan of action. Strategic management and planning is a process that allows an organization's members to think critically about who they are and what it is they want to accomplish, the best strategy for living in their purpose, and how to implement and evaluate those strategies in a systematic way. However, the plan has to be flexible enough to hold up to the changing environment.

Need for a mission and vision in the church. Organizational planning begins with a clearly defined mission and vision. If an organization does not

know what it is and where it wants to go, it will remain stagnant. An organization's mission describes its reason for existing. Cummings and Worley defined a mission as "a statement of the organization's purpose, range of activities, character, and uniqueness" (2008, p. 751). Some would believe that the Great Commission is the ultimate mission of the church: "Therefore go and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, teaching them to obey everything I have commanded you" (Mathew 28:19-20).

An organization's vision is described as "the core values and purpose that guide the organization as well as an envisioned future toward which change is directed" (Cummings & Worley, 2008, p. 169). Unlike a mission, it is liable to change from one year to the next as the priorities of an organization shift. However, creating a coherent vision can be challenging and when done incorrectly can depress motivation. Visions that are too vague can remain unfulfilled (Cummings & Worley, 2008).

Need for Appreciative Inquiry in the church. As both a tool and a philosophy, Appreciative Inquiry (AI) could aid churches with focusing on their strengths and assets during challenging times. AI is about celebrating what is working well and building upon that to imagine a better future. The principles of AI, which will be discussed in more detail in the following chapter, are very much suited for use in the church setting (Paddock, 2003; Sandu, 2011). The case has been made that the historical model of the appreciative paradigm itself can be traced back to stories in the Bible (Sandu, 2011). One example of this is the Beatitudes found in Matthew 5:3-12 which offer words such as "Blessed are

the meek, for they will inherit the earth” (Nikai, 2009). Also, the New Testament theology is, in essence, a positive appreciation. It marks a paradigm shift from the need for punitive governance like the 10 commandments to a more affirmative one based on love (Sandu, 2011). It allows for sharing profound stories of the Christian experience, builds faith, and changes to a more life-giving culture (Paddock, 2003). An appropriate image that captures both the AI and Christian experiences is one of stepping out of the dark and into the light.

While there is compatibility between AI and church values and beliefs, there have only been around a few dozen published papers documenting the use of AI in churches. The Appreciative Inquiry Commons, which serves as a repository of AI resources, listed 37 links including articles, books, tools, and case studies on the religious sector page. Based on a review of the articles and case studies cited on this page, the majority of them used AI as a tool rather than the all-around approach for planning (The Appreciative Inquiry Commons, 2012).

Purpose and Significance of Research

The purpose of this action research was to design and implement a strategic planning process at Friendship Baptist Church (FBC), using an AI approach. Non-profits, including faith-based organizations, have experienced the benefits of applying some best practices from the business world (Kohl, 1984; Wasdell, 1980). A few studies have looked at the application of strategic planning in faith-based organizations (Hussey, 1974; Kammer, 2010; Kohl, 1984; Malphurs, 2005). Even fewer have explored using AI as a tool for planning (Paddock, 2003). There remains a dearth of information about the

strategies used in the strategic planning process that are best suited for the church culture and environment. This thesis research will add to the body of literature in the area as well as provide data about the barriers and challenges encountered by a church embarking on AI-focused strategic planning for the first time.

Research Setting

An action research project was conducted in which a strategic plan for achieving FBC's vision was collaboratively designed and implemented. FBC was founded in September 1893 and was the first African American Baptist church in the city of Pasadena, California. Often referred to as "The Jewel of Old Pasadena," its accolades include being the first African American-related cultural landmark designated in Pasadena and being listed on the National Register of Historic Places in the United States of America.

The neighborhood around the church was once a predominately African American residential community but now has become a major shopping center in Pasadena, serving all walks of life. Through this change, FBC remained a permanent fixture in the community. While the church has become more multi-cultural to reflect this change, it still remains a predominantly African American church. FBC now serves as a spiritual home to about 375 members.

Under the leadership of Pastor Lucious W. Smith, FBC chose to engage in a strategic planning process. Pastor Smith cast his vision to grow the church through his sermons on Sunday morning. It is his desire to see FBC truly become a church of the community with members that are engaged in God's work. The church's website states, "Our history has brought us thus far on our

journey, and our future is the canvas upon which the Lord will paint His ultimate purpose.” This research project will aid the church in turning that vision into a plan.

Thesis Organization

The previous sections provided a general introduction to this thesis which included background on the research topic, the purpose and significance of this research, and a brief overview of the research design implemented.

Chapter 2 includes the review of relevant literature. The chapter was further broken up into the following sections: historical context of strategic planning, the various environments where it has been employed, the impact and challenges observed, and the different approaches to implementing a strategic planning process. Chapter 2 discusses the historical context and theories behind AI and its use as an approach to strategic planning.

Chapter 3 discusses the research methods employed for this project. Specifically, it describes the research purpose, research framework and design, participants, and data collection and analysis activities.

Chapter 4 presents the results from the primary data collection activities which included an initial congregation survey, field notes from the initial AI training, an AI training feedback form, and interviews with Strategic Planning Committee members.

Chapter 5 summarizes the key findings from the previous chapter and provides a discussion of the project conclusions. Recommendations for the church are shared and suggestions for future research are provided. Also, the limitations of the study are presented.

Chapter 2

Literature Review

The purpose of this action research was to design and implement a strategic planning process at FBC using an AI approach. This chapter discusses the literature on strategic planning, specifically exploring the historical context, the various environments in which it has been employed, the impact and challenges observed, and the different approaches to implementing a strategic planning process. The second section of this review discusses the historical context and theories behind AI and its use as an approach to strategic planning.

Strategic Planning

Historical context. Strategic planning is defined as

A deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is (its identity), what it does (its strategies and actions), and why it does it (mandates, missions, goals, and the creation of public value). (Bryson, 2010, p. S256)

The concept of using a strategic approach to planning has been around for hundreds of years. Stavros, Cooperrider, and Kelley (2003) presented a timeline chronicling the history of strategic planning, starting as early as the fourth century BC. They referenced ancient Athenian writings on military strategic planning as the first documented writings which outlined specific aspects of strategic planning based on the theory of divide and conquer. The document addressed important elements of planning such as the role of strategists, strategy development, and resource allocation. In their view, the next series of writings on strategic planning came from Japanese literature written by a Samurai warrior named Miyamoto Mushahi. They identified books

such as *A Book of Five Rings* as prominent Japanese literature, deemed required reading by many American businessmen during the mid-1970s. The book presented Samurai-influenced strategic skills and strategies for approaching all aspects of life.

Most researchers date the birth of modern-day strategic planning to the late 1960s to early 1970s (Cross, 1987; Mintzberg, 1994; Stavros et al., 2003). Strategic planning is said to have been popularized in the late 1960s by the Boston Consulting Group when they developed an easy-to-use strategic planning tool for corporations called the BCG Growth/Share Matrix (Cross, 1987). Others argue that strategic planning as it is known today is credited to professors from the Harvard Business School in the 1960s who taught and wrote about business planning from a holistic point of view (Stavros et al., 2003).

Strategic planning has become a viable process for many organizations over the last 60 years. It has stood the test of time, standing apart from other approaches to planning because of its focus on the big picture and inclusion of various stakeholders working together to identify major issues and develop strategies to address them (Cross, 1987). One author shared that strategic planning “blends futuristic thinking, objective analysis, and subjective evaluation of values, goals, and priorities to chart a future direction and course of action to ensure an organization’s vitality, effectiveness, and ability to add value” (Poister, 2005, p. 46).

The core elements of a strategic planning process include developing a mission statement, conducting internal and external assessments, identifying

short-term and long-term objectives, determining and evaluating strategies, developing action plans, and identifying performance measures. While new approaches have emerged, there has been little deviance from this original model (Stravos et al., 2003).

Organizational planning often begins with a clearly defined mission and vision. Cummings and Worley defined a mission as “a statement of the organization’s purpose, range of activities, character, and uniqueness” (2008, p. 751). The vision is described as “the core values and purpose that guide the organization as well as an envisioned future toward which change is directed” (Cummings & Worley, 2008, p. 169). Unlike a mission, it is liable to change over time as the priorities of an organization shift. However, creating a coherent vision can be challenging and when done incorrectly can depress motivation (Cummings & Worley, 2008).

The strengths, weaknesses, opportunities, and threats (SWOT) analysis has become synonymous with strategic planning and is used as a tool for conducting internal and external assessments. Credited to Wehrich (1982) for its conceptualization, the SWOT analysis serves as a framework for helping an organization identify its potential as well as its limitations before engaging in planning. While once touted for being easy to use, the SWOT framework has been criticized for being too simplistic and rigid (Ip & Koo, 2004; Kong, 2008; Valentin, 2001). The SWOT analysis directs users to focus solely on only four elements, which are strengths, weaknesses, opportunities, and threats. This could potentially limit their understanding of the environment in which they are planning or their assets.

Impact of implementing strategic planning. There have been numerous case studies that document the usefulness of implementing a strategic planning process (Courtney, Marnoch, & Williamson, 2009; Kong, 2008). Some of these benefits, noted in a review of strategic planning, include promotions of strategic thinking, acting, and learning; improved decision making; enhanced organizational effectiveness, responsiveness, and resilience; enhanced effectiveness of broader societal systems; improved organizational legitimacy; and direct benefits for the people involved—that is, improved morale, increased fulfillment, and reduced anxiety (Bryson, 2010).

Challenges and issues related to strategic planning. While some studies, such as the ones mentioned earlier, highlight the benefits of strategic planning, other researchers claim that there is still a lack of empirical evidence, specifically large-scale studies, that demonstrate the effectiveness of strategic planning (Bryson, 2010). What causes the planning of one organization to succeed and another to fail? Is strategic planning not foolproof? What are the limitations of strategic planning?

One critique of strategic planning is that it can be exclusive. A study by Reid (1989) found that key stakeholders (the doers of the work) were left out of the strategic planning process. This was shown to lead, understandably, to lack of commitment and energy on the part of the excluded members. As a result, these companies did not experience the usual benefits from their strategic planning efforts.

Strategic planning has also received criticism for being a process that leads to the production of a cumbersome document that ends up sitting on a

shelf rather than being used (Mintzberg, 1994). “Strategic planning, as it has been practiced, has really been strategic programming, the articulation and elaboration of strategies, or visions, that already exist” (p. 107). Mintzberg argued, and others agreed, that the process becomes too formalized and can stifle strategic thinking and creativity (Bresser & Bishop, 1983). Therefore, the resulting product is often not very dynamic or useful.

Other researchers who share Mintzberg’s view add that strategic planning is often seen as a means to an end instead of an ongoing practice or process (Bryson, 2010). Bryson shared, “going through the strategic planning process is the real benefit . . . the process itself promotes strategic thinking, acting and learning” (p. S255). He believes that strategic planning should be seen as a practice because the act of strategic planning is what yields positive results.

Critics of strategic planning would agree that there is a need for new approaches. Strategic planning has to go beyond the one- or two-day retreats where an organization formulates a plan for an unknown future. Rather, the process needs to be one that lives and breathes, giving the organization a framework to help navigate its ever-changing environment.

Strategic planning in churches. Because of its acclaimed success in the business world, strategic planning has become a common practice in private, public, and more recently, faith-based organizations (Shah, David, & Surawski, 2004). There are a growing number of websites and resources dedicated to instructing churches on how to engage in strategic planning. They all list various steps to follow but, overall, there are three overarching phases

that appear consistent. The three phases are pre-planning, planning, and post-planning (Malphurs, 2005; Obey, 2011). The pre-planning phase should include some assessment of the congregation's readiness for change and data collection on the church's performance in previous years. The planning phase refers to the actual planning meetings and writing of the plan itself. In the final phase, the plan should be presented to the congregation and implementation begun. This phase should also include evaluation implementation and benchmarking (Malphurs, 2005).

Strategic planning tools used in the business world, such as the Balanced Scorecard, have been adapted for use in the church setting. The Balanced Scorecard is used to measure strategy as a means of monitoring execution of a strategic plan. In a study by Boggs and Fields (2006), researchers adapted outcome measures for the four perspectives of the Balanced Scorecard to assess organizational effectiveness in the church:

1. The financial perspective was measured by an increased annual church income.
2. The constituent perspective was measured by increased church membership.
3. The operations perspective was measured by increased attendance at Sunday morning worship services.
4. The innovation and learning perspective was measured by increased Sunday school attendance.

Few studies have demonstrated the impact of strategic planning in churches. In an exploratory study, 24 churches in the Florence, South Carolina,

area were surveyed to assess whether churches benefit from strategic planning (Shah et al., 2004). In this study, when asked how they perceived the growth in their church membership over the last two years, a significantly higher percentage of churches that engaged in strategic planning perceived their membership “improving greatly” (19%) compared to churches that did not use strategic planning (0%). Similarly, a larger percentage of “planning churches” reported great improvements in financial conditions compared to “non-planning churches” (29% and 0%, respectively). The study concluded that strategic planning was associated with church membership growth and positive financial conditions.

Another study presented a case study of a church with declining membership that had also suddenly recently lost its pastor. Additionally, the community surrounding the church went from a small farming community to a more cosmopolitan one with the introduction of a large university. Though the community had changed, the church’s strategy remained the same. The church underwent a strategic planning process that included self-study, evaluation, and realignment of the church’s strategy and its environment. The entire congregation was surveyed to gain a better understanding of where they were as a church and what they valued. The data were then synthesized, evaluated, and discussed. Then a model of strategic choice, created by Miles, Snow, Meyer, and Coleman (1978), was adapted to assess the church’s strategy and its alignment or misalignment with its environment. The strategic planning process resulted in a shift in attitudes, perceptions, and expectations of leadership and members; modification in the church’s strategies; and a focus on

planning for the future. The study's author summed this up by stating “. . . this congregation has experienced organizational learning, and the knowledge gained has resulted in a new direction in the life of this congregation” (Kohl, 1984, p. 81).

Similar results were found in a study by Wasdel (1980). A parish in Northeast London established a strategic planning group to develop a long-range plan. They were able to develop clear principles to guide the course for their future. However, they were met with opposition when they tried to implement the plan. The author noted that there are challenges to long-range planning in the church. Even though new strategies are proposed, the underlying tendency of a traditional organization, like a church, is to avoid the change and to preserve the status quo. The most common responses of churches are to separate themselves from the changing environment or change just enough to still maintain institutional survival. Two interventions were employed to aid the church: negative force-field and analogue modeling. The first called for identifying the “negative force-fields” or constraints that emerge rather than identifying and building upon the “positive force-fields” or functional work-drivers (p. 105). The author offered that by acknowledging the emerging constraints, the organization builds a feedback loop that facilitates continuous quality improvement. The second intervention entailed gathering a team of consultants and assigning them to groups in the church. The consultants then monitored their groups and collected data on them. Consultants reconvened and shared what was happening in the church by representing their assigned

group's perspective. They then were able to mirror what was happening in the church, surface underlying problems, and help them develop solutions.

Appreciative Inquiry

Historical context. Cooperrider and Srivastva are credited with developing AI in 1980 (Bushe, 2011). A recent article by Cooperrider and Whitney offered the following comprehensive definition of AI:

Appreciative Inquiry is about the co-evolutionary search for the best in people, their organizations, and the relevant world around them. In its broadest focus, it involves systematic discovery of what gives "life" to a living system when it is most alive, most effective, and most constructively capable in economic, ecological, and human terms. AI involves, in a central way, the art and practice of asking questions that strengthen a system's capacity to apprehend, anticipate, and heighten positive potential. (2011, p. 3)

Upon its inception AI was created to offer a new theory or philosophy of how people as humans view the world and interact with one another. The introduction of AI coincided with a major paradigm shift from the "current scientific paradigm," rooted in classical Newtonian mechanics, to the "emerging paradigm," rooted in quantum physics and new science (Watkins & Mohr, 2001, p. 21). This shift ushered in a new way of thinking about organizational change: from reductionism to holism, from engaging in dichotomous thinking to valuing harmony and collective thinking, from viewing the world as linear to viewing the world as circular and relational, from believing reality is something to be discovered to realizing people construct their own reality (Watkins & Mohr, 2001). AI has since been used as a strength-based approach to organizational change and development used in various types of organizations (Stavros et al., 2003).

Theory base of AI. The theoretical foundation of AI is social constructionism (Cooperrider, 1996; Watkins & Mohr, 2001; Whitney & Gibbs, 2006), which was founded on the works of researchers such as Berger and Luckmann (1966) and Gergen (1985). In a review of social construction theory, Dixson defined it as “a theory which assumes that the objective reality which each of us lives in is a social construction, and that language and conversation are the primary tools of construction” (2001, p. 154). In other words, social constructionist principle states that people’s reality is co-created and dependent on their relationships and conversations with one another.

The power of positive imagery is another theory base for AI (Cooperrider, 1990). This theory is founded on the belief and supported by research which demonstrates that one’s image of the future becomes one’s reality. Several authors described how the creators of AI pulled from studies in various disciplines which demonstrated the impact of positive images on a variety of outcomes, such as health, thinking capacity, performance, and relationships (Kelm, 2005; Watkins & Mohr, 2001). Positive thinking was shown to increase healing in the body, success in school, and athletic performance. Organizations also benefit from creating positive images of their future. When organizations change their dialogue from problem focused to opportunity, they allow for a more holistic understanding of their optimal performance (Watkins & Mohr, 2001).

Both social constructionism and positive image theories are captured in the five core principles of AI which include (a) constructionist, (b) simultaneity, (c) anticipatory, (d) poetic, and (e) positive. The constructionist and positive

principles have already been described in the previous sections. The simultaneity principle states that as one engages in genuine inquiry, one also engages in change. The two exist in the same space and time. “Inquiry is intervention” (Watkins & Mohr, 2001, p. 38). The anticipatory principle builds on the constructionist principle and states, “Our collective images or visions of the future create our future” (Kelm, 2005, p. 96). The final principle is the poetic principle which offers that there is endless potential for learning and interpreting the past, present, and future of human organizations (Watkins & Mohr, 2001). In other words, organizations, like poems, are open to never-ending interpretations, each one creating its own unique insights.

A different approach to an understanding of AI is rooted in positive organizational scholarship (Bright, 2009). This framework identifies the continuum on which organizations exist, which goes from a dysfunctional state to an extraordinary state, the latter being the ideal. The dysfunctional state represents conditions of negative deviance, in which the organization is ineffective and inefficient. The extraordinary state represents conditions of positive deviance, in which the organization thrives. In the middle lies the functional state, which represents an equilibrium condition where the organization is just trying to maintain normalcy. This framework reveals that there are two ways to move an organization from one state to another, which include focusing on fixing the problem or focusing on elevating the strengths and resources of the organization. The latter approach is the essence of AI.

AI is not only an approach, but it is also viewed as a way of living and being, a philosophy (Kelm, 2005; Voyle, 2000). Voyle described it as a “means

of living with, being with and directly participating in the life of a human system in a way that compels one to inquire into the deeper life-generating essentials and potentials of organizational existence” (2000, p. 1). This has been coined as appreciative living by Kelm (2005), who also developed a three-step process applying the principles of AI to everyday life called the Appreciating-Imagining-Acting process. The author described appreciative living as a journey and not a destination (p. 147). The appreciating step is about identifying what is right with the present situation or person. In the imagining step, one imagines his or her ideal state or the person he or she wants to be. In the final step, acting, one makes small changes to move towards the ideal situation and bring alignment. These steps are designed to help people ultimately get to a place where they can appreciate their current situation or person but move towards a place where they are taking strides to create alignment of action and their desired future.

AI in practice. The practice of AI can be seen as five basic or generic steps which include

- Choose the positive as the focus of inquiry
- Inquire into stories of life-giving forces
- Locate themes that appear in the stories and select topics for further inquiry
- Create shared images for a preferred future
- Find innovative ways to create that future (Mohr & Watkins, 2002, p. 5)

In the first step, the AI practitioner focuses on positive inquiry. The next step involves inquiring about stories that focus on “life-giving forces” or things that energize. Following the story telling is the identification of themes and selection of specific themes to use for further inquiry. The last two steps are to create a

shared vision for the future and identify strategies for achieving the shared vision.

Four models of AI were developed from the five generic steps, which include the original model developed by Cooperrider and Srivastva (1987), the Four-D model (Mann, 1997), the Five-D model (Voyle, 2000), and the Mohr-Jacobsgaard Four-I model (Watkins & Mohr, 2001). Table 1 compares the four models.

Table 1

Comparison of Four Appreciative Inquiry Models

	The Original Model	Four-D Model	Five-D Model	Four-I Model
Number of phases	Four phases (appreciating envisioning, dialoguing, innovating)	Includes four phases (discovery, dream, design, delivery)	Includes five phases	Includes four phases (initiate, inquire, imagine, innovate)
Overlap with “generic” Appreciative Inquiry steps	Contains all five core generic processes of Appreciative Inquiry	Contains all five core generic processes of Appreciative Inquiry	(Define, discovery, dream, design, delivery)	Contains all five core generic processes of Appreciative Inquiry
Unique characteristics	Original model	Developed for practical use in the field	Contains all five core generic processes of Appreciative Inquiry	Spotlighted the move from dreams to proactive propositions

The original model presented four phases which included appreciating, envisioning, dialoguing, and innovating. Implementation of this model would require the inquiry process to include

1) grounded observation to identify the best of what is, 2) vision and logic to identify ideals of what might be, 3) collaborative dialogue and choice to achieve consent about what should be, and 4) collective experimentation to discover what can be. (Bushe, 2011, p. 88)

This model illustrates that AI is simultaneously scientific/theoretical, metaphysical, normative, and programmatic in nature (Watkins & Mohr, 2001).

The Four-D model created by the Global Excellence in Management (GEM) Initiative is the most widely known. This model takes the group through a process of discovery, dream, design, and delivery (Mann, 1997). In the discovery phase, the participants are asked to tell a story about an accomplishment when they were at their best and appreciate the success it brought. Out of the collective stories emerge themes around what gave life to that group. The dream phase has the group imagining or “dreaming” about the future or an ideal state. This phase culminates with the group developing a visual image to represent their dream. In the next phase, design, the organization creates its “socio-technical architecture” (Watkins & Mohr, 2001, p. 28). Here the group develops a provocative proposition statement about how to achieve the dream. The last phase, the delivery phase, incorporates continuous learning and revisiting of the provocative proposition in order to maintain the momentum of the previous phases.

The Clergy Leadership Institute in the United States suggested an additional element to the Four-D model, definition. In this Five-D model, the define phase is seen as a preparatory phase which includes identification and agreement on the topic of the inquiry or the “affirmative topic” (Bushe, 2011, p. 90). The topics consist of the “identified qualities that an organization chooses to guide the formulation of questions for the interview guide, which becomes the

key process in the Discovery phase of the Five-D cycle” (Chupp, 2012, p. 7).

The other four phases of the Five-D model are exactly the same as the Four-D model.

Similar to the Five-D model, the Four-I model was developed out of the necessity of having a model that would provide the opportunity to educate the client system on AI and help them choose the topic of the inquiry. Additionally, the Four-I model highlighted the steps necessary to move from their dreams to designing their approach for the future (Watkins & Mohr, 2001). The four phases include initiate, inquire, imagine, and innovate. In the initiate phase, the key stakeholders are introduced to the principles of AI, identify the topic of their inquiry and set timelines, and identify participants and resources. The next phase, inquire, is where the interview protocol is developed and interviews are conducted. The imagine phase is similar to the design phase of the Four-D model, where provocative propositions are constructed from the interview data. The provocative propositions are then validated with other members of the system. The last phase, innovate, is the implementation of the design modifications (changes to the social architecture of the organization).

AI approach to strategic planning. AI has been used in many settings and has been found to be a useful approach in organization development and change. Stavros et al. (2003) shared that the advantages of using an AI approach are that it

- Focuses on the positive to crowd out the negative
- Builds organizational capacity beyond existing boundaries
- Invites stakeholders into the strategy process

- Builds relationships with partners
- Obtains input from all levels of the organization
- Obtains buy-in from all levels of the organization
- Allows the planning process to become much more of a process that incorporates and connects values, vision, and mission statement to strategic goals, strategies, plans, and a positive and objective review of goals
- Creates a shared set of organizational values and vision of the future organization

An early case study of the use of AI in strategic planning was a feasibility study which investigated whether AI could be used as an alternative to traditional strategic research approaches (deficit-based research) in a university on the verge of a significant change process with the implementation of new legislatively mandated directives aimed at increasing productivity (Saunders, 1998). The researcher took an AI approach to conducting strategic research by focusing on what worked and developing provocative propositions rather than problem statements. The study hypothesized that the use of AI would create two-way symmetrical relationships among public relations practitioners. It was found that employing AI resulted in greater focus on relevant issues through consensus building. Specifically, there was improved communication about the new changes, and a better understanding between the university and its public was achieved.

Another case study evaluated the use of AI as a tool for organizational transformation in two women's health projects in Nepal. AI workshops, following

the Four-D model, were conducted at the project-supported health facilities to achieve positive transformation of their service systems. The before-and-after stories shared by the participants highlighted benefits such as “(1) benefits of teamwork; (2) improved cleanliness of facilities; (3) better social relationships on teams; (4) increased respect shown to patients regardless of caste or class; and (5) positive personal effects on themselves and their families” (Messerschmidt, 2008, p. 454).

A meta-case analysis conducted by Bushe and Kassam (2005) assessed 20 cases of the use of AI in a change process to test the outcome claims made about AI. The following eight variables were assessed:

1. Transformational change (yes or no)
2. Outcome was new knowledge versus simply new processes
3. Intervention created a generative metaphor (yes or no)
4. Intervention adhered to the nine principles of AI (yes or no for each principle)
5. Intervention followed the 4-D cycle (yes or no for each D)
6. Intervention began with collecting stories of the affirmative topic (yes or no)
7. Intervention focused on figure or on ground (figure or ground)
8. Intervention concluded with implementation or improvisation (implementation or improvisation)

The study found that 35% of the cases examined led to transformational change. Those that led to transformational change were more likely to have created new knowledge, created a generative metaphor and penetrated the

ground of the organization, and used improvisational approaches when compared to cases not reporting transformational outcomes. The authors concluded that transformational change was associated with more radical implementation of AI, such as an improvisational approach. The study also found that the use of more conventional AI techniques, such as the Four-D model or story telling, resulted in more conventional change outcomes. The authors stressed the importance of practitioners and managers being aware that AI is more than just the Four-D model, and the use of the Four-D model and story telling should be strategically focused on generating new knowledge (Bushe & Kassam, 2005).

An article by Stavros et al. (2003) introduced the SOAR (strengths, opportunities, aspirations, and results) tool for implementing an AI-focused strategic planning process. SOAR is an alternative to the traditional SWOT (strengths, weaknesses, opportunities, and threats) needs assessment often used in organizational planning. This model begins with strategic inquiry about an organization's strengths and opportunities. Following this phase, participants share their aspirations for the future and then develop measurable results with associated recognition and reward programs to encourage participant momentum (Cooperrider, Whitney, & Stavros, 2003).

The article by Stavros et al. (2003) also provided case studies highlighting the impact the tool had on three companies. The authors shared the story of Roadway Express, a Fortune 500 trucking company, which piloted the SOAR framework in its strategic planning summit in five of its 300 terminals. Six weeks after its sixth pilot, the company reported increased revenues

translating to \$17 million in additional revenue for the year and \$7 million annual profit. The second story was of Weatherhead School of Management at Case Western Reserve University. The resulting outcomes of its SOAR process included clear articulation of the mission, values, and core beliefs of the university; aspirational images of success for each of the university's stakeholder groups; and agreement on results by all participants. The final story was of Tendercare, a regional long-term care provider. After engaging in the SOAR process, the company decided to take the appreciative approach of investing more resources in centers that were doing well and closing down one of the centers that was failing.

AI in churches. The traditional AI models have even been adapted for the church setting. Voyle (2000) applied the Five-D model of AI to strategic planning in churches. In the definition phase, churches prepare for an appreciative process as well as assess the need for development. The discovery phase is where the church becomes clear about its current state. The dream phase is described as God's vision for the future of the church. In the fourth phase, design, the church creates a plan that aligns its vision, ideals, values, structure, and mission with its strategies. The final phase, deliver, is the actual implementation of the plan.

One of the first case studies of faith-based institutions adopting AI was the Catholic Church (Paddock, 2003). In 1996 Father Gregorio Banaga implemented AI as a tool for strategic planning at Philippine Ministry in Cleveland, Ohio. He then interviewed those who participated and were changed by the experience. What he concluded was that methodology does make a

difference. By choosing to focus on the positive, it allowed for more hope for the future.

Chaffee (2005) shared his experience implementing an appreciative approach to prayer in the small church where he served as interim pastor. Following the sermon, he invited congregation members to reflect on their past week and share things for which they were grateful and concerned. Then he led them in prayer that included the thanksgiving and requests. What he found was that a year later, the result was an increase in reports of answered prayers.

Roehlkepartain (2007) shared a story of the impact of focusing on what works in a religious organization. Using the National Church Development tool, Aldersgate United Methodist Church in St. Louis Park, Minnesota, implemented a strategic planning process, but the church modified the National Church Development approach by adding AI instead of implementing a traditional needs assessment. They also included youth in the planning process rather than just adults. Results from the AI needs assessment were incorporated into a one-day vision retreat to create their vision statement. The author reported that the experience gave the church “a new sense of hope and direction” (p. 16).

The body of literature on AI in the church continues to grow with the work of master’s and doctoral student research. In his dissertation, Brown (2009) reported on two AI sessions he led at Colchester Assembly of God as one phase in a process to discover and implement a strategy for growth of the church. The sessions began with a presentation on the key assumptions of AI and an explanation of the difference between AI and general problem solving.

During the sessions, participants were divided into small groups of six to share their answers to the AI-focused questions presented. The focus of this session was to identify the church's strengths. Following the sessions, the church board reviewed the results of the AI process and chose a team to develop provocative propositions. Brown concluded that the AI session was successful, yet he felt that he needed more training on conducting the sessions.

Dishman's (2009) research for a master's thesis utilized AI as the primary approach to understanding how church leadership could influence the recruitment and training of new deacons. Focusing questions around examples of successful leadership principles and concepts, the researcher utilized three methods of data collection: (a) a focus group with the church leaders, (b) interviews of leaders of 15 neighboring churches, and (c) a survey of members of the church to incorporate their feedback. Results revealed that church leadership had a strong influence on recruitment. Church leaders' character was directly associated with congregation members' willingness to participate, volunteer, and become involved in the church. Participants reported that the character traits important for church leaders, as well as new deacons, to possess were integrity, trustworthiness, and credibility. Participants expressed that these criteria either qualify or disqualify a man's ability to be an effective deacon. The concluding recommendations from the research were for the church to build on the success of past leadership workshops and create a leadership series, use people in the church to deliver the workshops, and create a feedback program to measure the success of the workshops.

Conclusion

Strategic planning has become a common process in business today. In today's ever-changing environment, strategic planning, when done well, can help organizations to navigate the tumultuous waves of a seemingly unpredictable marketplace. The benefits of strategic planning have been experienced by private, public, and non-profit sectors. Similarly, faith-based organizations have begun to subscribe to this practice as a means of addressing their challenges and making the necessary changes to accomplish their goals.

While there are many approaches to strategic planning, an AI approach is strength based and focuses on the positive. The theoretical foundation and core principles of this approach are thought to be in line with the underlying beliefs and values of faith-based organization. Few studies, however, have looked at the efficacy of designing and implementing an AI approach to strategic planning rather than as one component of the process. It is hoped that this research adds to the body of literature on this subject matter.

Chapter 3

Methods

This chapter discusses the research methods employed for this project. Specifically, it describes the research purpose, research framework and design, participants, and data collection and analysis activities.

Research Purpose

The purpose of this action research project was to design and implement a strategic planning process at FBC using an AI approach. The goal was to gain a better understanding and document the feasibility and impact of implementing an AI approach to strategic planning within a faith-based organization.

Research Framework and Design

The strategic planning process involved four phases:

- Phase 1: Create the vision statement/data gathering
- Phase 2: Prepare for planning/strategic thinking
- Phase 3: Develop a plan for achieving the vision
- Phase 4: Implement and evaluate the effectiveness of the plan

The framework used for this research, depicted in Figure 1, describes where each phase of the project intercepted with the Four-D cycle of AI.

Phase 1 of this project encompasses the discovery phase of AI and consisted of two parts: (a) identifying the vision and (b) data gathering. The principal investigator worked with the pastor of FBC to extract his vision for the church and discuss his dreams for the future. Simultaneously, the principal investigator analyzed and summarized data from a congregation survey that

captured congregation members' values and their perceptions of the FBC. Both pieces of information informed the strategic planning process.



Figure 1

Model of Appreciative Inquiry-Focused Strategic Planning

Phase 2 was preparation for the strategic planning process. The principal investigator delivered the AI training to the Strategic Planning Committee (SPC) members, to aid them with envisioning positive possibilities for the church. The AI training gave participants a brief overview of AI and addressed how AI could be used as a philosophy as well as an approach to strategic planning. As a part

of the training, participants engaged in two AI exercises. The first exercise allowed participants to practice AI using an interview protocol which was modified from one developed by Watkins and Mohr (2001). In the second exercise, SPC members broke out into four groups and identified FBC's strengths, opportunities, aspirations, and results (SOAR), which is an AI approach to identify needs and gaps. The training materials including the agenda and protocol can be found in Appendix A.

During Phase 3, SPC members designed and carried out five planning meetings using the principles of AI. The final product from these meetings was a strategic planning document which outlines their goals, objectives, action plans, budget considerations, milestones, and plans for evaluating success. At the end of this phase, the SPC shared the plan with the congregation. SPC members also presented the final plan to the ministry leaders and had them develop work plans that aligned to the strategic planning document.

Phase 4 was the implementation and evaluation of the strategic plan. The principal investigator supported the SPC with developing a process for monitoring progress and implementation of the strategic plan. It is important to note that Phase 4 extended beyond the life of this research project, so data collection activities were focused on the first three phases.

Participants

Selection criteria. The subjects for this research were the members of FBC's SPC and the congregation members. The only criterion for participation in this study was to be 18 years of age or older. SPC members were selected

through an application process and were made up of executive board members, ministry staff, and other congregation members.

Sampling. All SPC members ($n = 18$) who participated in the AI training were invited to complete a feedback form and participate in a brief interview. A convenience sampling method of the active membership at FBC ($n = 375$) was used for the congregation survey to ensure a large enough sample after accounting for attrition. Surveys were administered during a Sunday service to all those in attendance and emailed for those who were not in church that Sunday. The expected response rate, based on past surveys, was around 43% ($n = 160$). A total of 121 people responded, which was almost a third of FBC's active membership.

Recruitment. All study participants were recruited from FBC. An application process was employed to select SPC members. Selected SPC members were then invited to participate in data collection activities (feedback form and interviews) during the first orientation meeting, before the AI training. At that time they were also made aware that their participation was voluntary and they could drop out at any time.

Informed consent. Prior to their participation in any data collection activities, all participants were given a consent form to read, which provided a brief description of the study, risks, benefits associated with participation, and their right to drop out at any time without penalty. Participants completing a feedback form or interview were asked to sign and return the informed consent document. A waiver of documentation of informed consent was granted for a congregation survey by Pepperdine University's Institutional Review Board.

Data Collection

The primary and secondary research questions are as follow:

Primary question: What is the impact of using AI as an approach/philosophy to implementing a strategic planning process at FBC?

Secondary question: What does an AI-focused strategic planning process look like within a church?

To address these questions, a triangulation of research methods was employed (survey, direct observations, and interviews). Data collection tools included a feedback form, an interview protocol, a survey instrument, and field notes.

Initial congregation survey (historical data). The purpose of the initial congregation survey was to get a baseline on congregation members' values and perceptions of the FBC and to demonstrate the need for a strategic planning process. A convenience sampling methodology was used, with surveys administered during a Sunday service to all those in attendance. In attempts to include everyone, the survey was also sent out in an email for those who were not in church that Sunday. The survey instrument was adapted from a validated instrument, the "Healthy Church Assessment Tool," shared at the Healthy Church 2005 event held by the North Georgia Conference Office of Connectional Ministries; it has been used by many other churches to assess the health of their churches (see Appendix B).

Field notes from AI training. Field notes were taken during the AI training to capture the process data about the results of the exercises that were implemented: (a) an AI experience for SPC members culminating with the

development of provocative propositions, (b) the needs assessment results (SOAR analysis), and (c) the SPC members' AI strategic planning process design.

AI training feedback form. All 18 of the SPC members were asked to complete a feedback form following the AI training in Phase 2. (The informed consent form as well as the feedback form are included in Appendix C.) The feedback form was designed to assess their perceptions of the usefulness of the training in preparing them for the strategic planning process and to gauge their understanding of AI principles. The instrument consists of 13 questions. Completion of the form took approximately 10 minutes. Feedback forms were collected from 13 of the 18 SPC members following the AI training, resulting in a response rate of 72.2%.

Interview protocol. Following the completion of the last AI-focused strategic planning meeting, 30-minute interviews was conducted with participating SPC members to assess their perceptions, satisfaction, and willingness to stay engaged in the strategic planning process. (Appendix D includes the informed consent form and protocol for these interviews.) The interview protocol contained six questions and was administered by the principal investigator. The questions were as follow:

1. Reflect on how you felt at the beginning of the strategic planning process.
2. Describe a time during the strategic planning process when the planning team was working at its best.

3. What was the biggest success the strategic planning team experienced?
4. What are some opportunities to improve the next strategic planning process?
5. What did you learn about yourself during the strategic planning process?
6. Imagine that it is three years later. Where do you see Friendship Baptist Church?

Data Analysis

Quantitative analysis was used for the feedback form and congregation survey data using the Statistical Package for the Social Sciences (SPSS). More specifically, descriptive statistics were conducted on variables of interest. Analyst-constructed categories from transcription of the SPC interviews and field notes were used to identify major themes associated with participation in the strategic planning process. The identified themes then were used in the qualitative content analysis of the transcribed data (Punch, 2005).

No identifying information was obtained from participants on the feedback form. Data from the feedback forms were manually entered by the principal investigator. Interviews with SPC members were conducted on a one-on-one basis. Interview notes were not viewed by anyone except for the principal investigator. No names were attached to the researcher notes. No identifying information was associated with participant responses to the congregation survey. All results were reported as an aggregate of all the responses collected.

Feedback forms and survey data were entered into an Excel database housed on the password-protected laptop computer of the principal investigator. Additionally, interview notes also were transcribed and housed on the password-protected laptop computer of the principal investigator. All data will be destroyed after three years.

Chapter 4

Results

The purpose of this action research was to design and implement a strategic planning process at FBC using an AI approach. This chapter presents the results from the primary data collection activities which included an initial congregation survey, field notes from the initial AI training, an AI training feedback form, and interviews with SPC members.

Initial Congregation Survey Results

Data from FBC's initial congregation survey were analyzed to get a baseline on congregation members' values and perceptions of the FBC and to demonstrate the need for a strategic planning process. A total of 121 of the 375 active members responded, representing a response rate of about 33%. The majority of survey respondents were African American, which reflects the current demographics of FBC. Nearly half of those who responded were active in church ministries.

In questions 1 to 13, respondents were asked to rate FBC on various characteristics of a healthy church on a scale from 1 to 5, with 5 being the highest score (see Table 2). Overall, FBC received high ratings (scores of 4 or 5) for each of the characteristics of a healthy church. About one fourth (23%) or fewer congregation members gave any of the characteristics a low rating (scores of 1 or 2). The following three characteristics received the greatest proportion of high ratings: quality of worship (78%), hospitality (70%), and spirituality (66%). This meant that they felt at FBC

- Worship is alive, has energy, and suits the context

- We are intentional at making people feel welcome without being too pushy.
- Most people practice prayer, Bible study, and other means of grace on a daily basis.

However, advocacy, accountability, and diversity received the lowest ratings, when taking into account the percent of those who gave a rating of 1 or 2 (23%, 20%, and 18%, respectively). This meant that these congregation members felt that at FBC

- Our church rarely joins in the cry of those hurt by societal circumstances that diminish the Divine worth of any human (i.e., injustice, bias, racism, poverty, etc.).
- There is a low level of commitment on the part of all with many un-kept promises.
- We rarely reach out to people who are of a different ethnic group.

Table 2

Faith Baptist Church's Ratings on Characteristics of a Healthy Church

Characteristics	Low		Neutral	High	
	1	2	3	4	5
Hospitality	5%	3%	19%	24%	46%
Quality of Worship	4%	3%	12%	34%	44%
Faith Formation	5%	3%	24%	32%	30%
Mission	5%	9%	22%	32%	27%
Leadership	9%	8%	26%	31%	21%
Membership Support	6%	9%	29%	28%	21%
Communication	9%	7%	18%	44%	18%
Diversity	9%	9%	32%	29%	18%
Priority for Youth	5%	11%	32%	29%	18%
Advocacy and Justice	11%	12%	28%	28%	18%
Accountability	9%	11%	32%	23%	17%
Spirituality	4%	4%	21%	50%	16%
Stewardship and Generosity	5%	9%	25%	35%	15%

N = 121; Low = 1-2, Neutral = 3, High = 4-5

In questions 14 to 28, respondents were asked to rate the importance of various elements for their church experience, from very important to not important (see Table 3). Overall, each of the elements listed in Table 3 was seen as an important part of church experience by about 50% or more of the congregation members. The top three elements to church experience receiving the highest proportion of “very important” ratings were evangelism (81%), families (81%), and tradition (78%). In other words, many respondents felt that telling others the good news about Christ, a focus on families, and following customary procedures were the most important parts of their church experience. Obedience, preaching and teaching support, and Bible knowledge received the fewest “very important” ratings (26%, 28%, and 34%, respectively). This meant that having a willingness to do what God or others ask, communicating God’s Word to people, and a familiarity with the truths of scriptures were least important to many of the congregation members who completed the survey.

For the last question on the congregation survey, respondents were asked to share one enhancement they would make to FBC. Five major themes emerged: making changes in the approach to the church service and other business of the church, shifting the culture of the church, providing more youth and community outreach, increasing diversity, and improving or strengthening leadership in the church (see Table 4).

Table 3

Rating of Importance of Elements of Church Experience

		Rating			
		Not Important	Somewhat Important	Important	Very Important
Elements of Church Experience	Evangelism: Telling others the good news about Christ	0%	6%	7%	81%
	Families: People immediately related to one another by birth or marriage	1%	3%	10%	81%
	Tradition: The customary ways or the "tried and true"	0%	1%	16%	78%
	World mission: Spreading the gospel of Christ around the globe	0%	0%	18%	77%
	Encouragement: Giving hope to people who need some hope	0%	3%	17%	73%
	Innovation: The willingness to take the first step or do something different	1%	2%	21%	71%
	Worship: Attributing worth to God	0%	3%	18%	70%
	Giving: Providing a portion of one's finances to support ministry	0%	2%	23%	69%
	Cultural diversity: A variety of race/ethnicity, age, gender, and socio-economic backgrounds	2%	1%	30%	62%
	Fellowship: Relating to and enjoying one another	0%	3%	33%	57%
	Community: Caring about and addressing the needs of others	1%	7%	31%	56%
	Prayer: Communicating with God	3%	12%	33%	47%
	Bible knowledge: A familiarity with the truths of Scriptures	9%	23%	26%	34%
	Preaching and teaching support: Communicating God's Word to people	6%	9%	29%	28%
	Obedience: A willingness to do what God or others ask	11%	32%	25%	26%

N = 121

Table 4***Themes From Open-Ended Question***

Theme	Quote Example	% of Total Comments *
1. Changes in approach to service/business	“Open more time for testimonies.”	25%
2. Shift in culture/behavior	“Supporting others instead of cutting them down when branching out in new ventures.”	22%
3. More youth and community outreach	“More opportunities to help our community, helping at-risk youth and the homeless rather than just talking about it.”	19%
4. Diversity	“Diversity with not only the body of the church but the ministerial staff.”	14%
5. Leadership	“Officers and leaders to get really involved and participate in Bible study and leadership/spiritual growth; this is needed to grow and mature.”	11%

*Numbers do not add up to 100% because 9% of the comments did not fit into any of the themes described above

Results from FBC’s congregation initial survey were shared at a church business meeting. Responses from attendees revealed inconsistency in what they believed to be true about the church and the perceptions shared by respondents to the survey. Members expressed concern that some of the core values of a church service were not as highly rated as they had anticipated. There was a shared perception that there was need for alignment. Following this meeting, FBC embarked on its AI-focused strategic planning process.

AI Training Results

Field notes. Field notes from the AI training captured the outputs from the two training exercises. The first exercise led participants through an AI

experience using an interview protocol modified from one developed by Watkins and Mohr (2001). In the second exercise, the SPC members assessed FBC's strengths, opportunities, aspirations, and results (SOAR), which is an AI approach to identify needs and gaps. Results from the SOAR analysis are captured in Table 5.

Table 5

Results From SOAR Analysis

Strength	<ul style="list-style-type: none"> • History/tradition/reputation/longevity • Members ready for change • People trust pastor • Pastor recognizes it's the season for change • Importance/focus on strengthening families/marriages • Maximizing our current space (overflow) • Wealth of talent within the church • People like worship service • People are joining, friendship/growing membership • Spiritual growth of members • There is a small group of committed workers • Great location • Our friendliness/loving • Abundance of ministries • Increased baptisms
Opportunities	<ul style="list-style-type: none"> • Need for more cultural diversity • Reach out to the nearby community <ul style="list-style-type: none"> ○ Faith Baptist Church events ○ Farmer's markets

	<ul style="list-style-type: none"> ○ Community flu shots ○ Evangelism ○ Health and wellness fairs ○ Faith Baptist Church sports teams ○ Build relationships with neighboring vendors ● Build/strengthen infrastructure to support new members and help them to stay committed ● Growth opportunities for current members ● Learn from other churches ● Limited parking ● Bound to our historical status ● Expansion ● Youth development ● Financial stability (debt free, increase stewardship) ● Ministerial expansion (staff and personnel) ● Membership participation ● Revise bylaws ● Transportation ● Alternative services (other than Sundays)
Aspirations	<ul style="list-style-type: none"> ● All members participate in a “Spiritual Gifts” assessment ● Change culture of Faith Baptist Church to one that prioritizes obedience, trust, positivity, respect, encouragement ● Have an executive director to improve accountability ● Structural efficiency (new constitution/bylaws) ● Excellence (Faith Baptist Church will do everything at a high standard) ● Support for current church leadership (assistant pastor, youth pastor, paid admin staff, community liaison, full-

	<p>time minister of music)</p> <ul style="list-style-type: none"> • Faith Baptist Church will be trendsetters (modern and relevant, visually recognized worldwide) • Increased fellowship with other churches • Improve time management (Sunday service) • Improve over-dependence on pastor and/or Sunday service • Increase awareness of resources
Results	<ul style="list-style-type: none"> • More diverse church • More effective leadership • Willingness to break tradition • Efficient use of time for Sunday service • Greater presence in the community • More doers and not hearers of the word • Effective ministries with a “growth” purpose

The results of the SPC’s AI experience were the following provocative propositions:

- “Friendship is a church reaching a diverse population, meeting needs and providing resources, drawing in people as well as sending them out to disciple.”
- “Church in the community and of the community.”
- “A church that lives its beliefs out loud by knowing, loving, and serving God, one another, our community, and our world.”
- “FBC will be a visionary church of the community, meeting the needs (spiritual, emotional, and physical), drawing in new disciplines, and nurturing their growth, to enlarge our territory.”

Overall, SPC members shared their dreams for the church. These included increasing diversity; reaching out to the community; meeting the needs of its congregants; and expanding its reach, influence, and territory. These points were incorporated into the goal areas for the strategic plan.

AI training feedback form results. Feedback forms were collected from 13 of the 18 SPC members following the AI training, resulting in a response rate of 72.2%. Results were obtained using a four-point Likert scale questionnaire. For questions 1 to 7, participants were asked to rate various aspects of the training as poor (1), fair (2), good (3), or excellent (4). For questions 8 to 11, participants were asked to rate their level of agreement to meeting the training objectives by responding strongly disagree (1), disagree (2), agree (3), or strongly agree (4). Due to the ordinal nature of the responses, non-parametric statistical tests were performed (maximum, minimum, median) to analyze the data. Descriptive statistics were also run to show the proportion of respondents who selected any given answer choice.

Participant responses to questions about logistical aspects of the AI training session were overwhelmingly positive, resulting in a narrow spread of the data (see Table 6). For questions 1 through 7, the median value for all the questions was 4; the maximum value was a 4, with a minimum of 3. Of all questions related to the training logistics, 76% or more of the responses were “excellent” and 8 % or more of the responses were “good” (see Table 7). Over 90% of respondents rated the overall training as “excellent.”

Overall, participants agreed that they met four key objectives of the training, which were to (a) understand the concept of AI as a theory,

Table 6***Appreciative Inquiry Training Questions 1 to 7 Responses***

Questions	Range	Median
1. The content presented during the training was . . .	3-4	4
2. The extent to which the training objectives were met was . . .	3-4	4
3. The opportunity for me to participate during the training was . . .	3-4	4
4. The PowerPoint and handouts were . . .	3-4	4
5. The presenter's knowledge about the topic was . . .	4-4	4
6. The presenter's delivery of the presentation was . . .	3-4	4
7. Overall, the training was . . .	3-4	4

N = 13

Scale: 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent

Table 7***Descriptive Statistics for Questions 1 to 7***

Question	Poor % (n)	Fair % (n)	Good % (n)	Excellent % (n)
1. The content presented during the training was . . .	0.0% (0)	0.0% (0)	15.4% (2)	84.6% (11)
2. The extent to which the training objectives were met was . . .	0.0% (0)	0.0% (0)	23.1% (3)	76.9% (10)
3. The opportunity for me to participate during the training was . . .	0.0% (0)	0.0% (0)	7.7% (1)	92.3% (12)
4. The PowerPoint and handouts were . . .	0.0% (0)	0.0% (0)	23.1% (3)	76.9% (10)
5. The presenter's knowledge about the topic was . . .	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (13)
6. The presenter's delivery of the presentation was . . .	0.0% (0)	0.0% (0)	7.7% (1)	92.3% (12)
7. Overall, the training was . . .	0.0% (0)	0.0% (0)	7.7% (1)	92.3% (12)

N = 13

(b) understand the concept of AI as a process, (c) feel that they could practice the concepts of AI in their daily lives, and (d) understand how to apply AI to the strategic planning process. For questions 8 through 11, the median value was 3 on a scale of 1 to 4, which represented a response of “agree.” The maximum value for questions 8 through 11 was 4, with a minimum of 3 for all questions except for Question 9, which had a minimum of 2 (see Table 8). The majority of respondents (92% or more) agreed or strongly agreed with questions 8 through 11 (Table 9). For all the questions related to training objectives, 31% or more of the responses were “strongly agree” and 46% of the responses were “agree.”

Table 8

Results for Questions 8 to 11: Range and Median

Question	Range	Median
8. I understand the concept of Appreciative Inquiry as a theory.	3-4	3
9. I understand the concept of Appreciative Inquiry as a process.	2-4	3
10. I feel that I could practice the concepts of Appreciative Inquiry in my daily life.	3-4	3
11. I understand how I can apply Appreciative Inquiry to the strategic planning process.	3-4	3

N = 13

Scale: 1= Strongly Disagree, 4= Strongly Agree

Table 9

Results for Questions 8 to 11: Rating

After today's training . . .	Strongly Disagree % (n)	Disagree % (n)	Agree % (n)	Strongly Agree % (n)
8. I understand the concept of Appreciative Inquiry as a theory.	0.0% (0)	0.0% (0)	61.5% (8)	38.5% (5)
9. I understand the concept of Appreciative Inquiry as a process.	0.0% (0)	7.7% (1)	46.2% (6)	46.2% (6)
10. I feel that I could practice the concepts of Appreciative Inquiry in my daily life.	0.0% (0)	0.0% (0)	69.2% (9)	30.8% (4)
11. I understand how I can apply Appreciative Inquiry to the strategic planning process.	0.0% (0)	0.0% (0)	69.2% (9)	30.8% (4)

N = 13

The final two questions on the feedback form, Question 12 and Question 13, asked participants to share what they found most useful about training and what additional information or resources they would like to help them better understand AI. All 13 of the respondents gave a response to Question 12. The two most commonly mentioned responses were the positive focus on possibilities and the future ($n = 5$) and the organized approach to planning ($n = 3$). Using the words of the respondents, one respondent stated, "The focus on possibilities and attributes rather than faults" was what she found most useful. Another shared, "I personally appreciated the systematic approach to the inquiry of the vision and priorities of the church." A few shared that they found the participation of group members most useful.

Eight out of the 13 respondents provided a response to Question 13. In response to Question 13, which asked about the need for additional resources, respondents mentioned wanting more resources in general ($n = 3$), printed copies of the training materials ($n = 2$), and more examples of AI strategic

planning in the church ($n = 2$). One person did not need any additional resources.

AI Strategic Planning Process Design

After receiving training on AI, the SPC was charged with developing an AI-inspired strategic planning process. The smaller coordinating team of the SPC created a process which encompassed the core elements of AI. The resulting AI-focused strategic planning process, which occurred over a series of meetings, is outlined below:

Discovery

- SPC members shared stories about FBC at its best and were asked to engage other congregation members in sharing their stories.

Dream

- SPC members shared their dreams for FBC.
- SPC created and launched the “Imagine” campaign to brand the strategic planning process and engage the membership. This included morning announcements and activities where the congregation was asked to imagine the possibilities for FBC.

Design

- SPC developed a strategic planning document and shared it with members.
- Ministry leaders developed work plans for the ministry that aligned with the four goals of the strategic plan.

- The pastor conducted a sermon series on the four goals of the strategic planning process and charged congregation members to think about what they could do personally to help achieve the goals.

Destiny

- SPC developed a process for tracking progress towards their goals.
- The SPC will continue to support in the implementation of the plan.

FBC's Strategic Planning Document

FBC developed its first strategic planning document and a revised vision statement that encompassed congregation findings, SOAR analysis results, and provocative propositions from the SPC's AI experience. The final strategic planning document outlined the four strategic goal areas that FBC has chosen to work towards for the next three years. The goal areas included

1. Equipping the Saints—"to help them find relevance for spiritual growth; defend their faith and implement teachings in the following areas of their lives (spiritual, physical, emotional, and financial)."
2. Engaging the Community—"to welcome, build meaningful relationships, and assess/meet the needs of the community."
3. Enlarging our Territory—"to add to, give greater scope to, or expand reach in terms of geography, social, influence, politics, and spiritual."
4. Ensuring Excellence—"to make certain that the standards of exceptional quality, accountability, and purposefulness are present in everything we do."

The revised vision statement read: "Friendship Baptist Church will be a visionary church enabling a diverse population to strengthen their relationship

with God for the purpose of changing the world through the advancement of God's kingdom.”

Following the completion of the strategic planning document, each ministry at FBC was instructed to develop a work plan that is aligned with the strategic planning document. The SPC also provided training to ministry leaders aimed at building their capacity to support their teams in achieving the objectives of their work plans. Additionally, FBC has developed a process for tracking progress towards their goals.

SPC Interview Results

An hour after the completion of the strategic plan, a 30-minute group interview was conducted with 10 of the 18 strategic planning members who agreed to participate. Below is a summary of the responses to each question asked and emergent themes from the content analysis.

Question 1a asked: How engaged would you say you were at the beginning of the process?

When asked this question, all agreed verbally or with a head nod that they were engaged. Some continued to say that they were excited and expectant at the beginning of the strategic planning process. However, there was some anxiety about the unknown. One participant shared:

I was excited that we were going to try to make changes but how receptive that would the church family be to this change. You know, we've done all this work and to see if it would really go through.

Another shared:

I was always concerned about was that every leader who came on board was a leader that knew somewhat the negative history and because they didn't know how to move beyond that negative history, they just brought back into an office and ministry.

Some of those interviewed (4 out of 10) also shared that they felt overwhelmed by the task of developing a strategic plan. One stated, "I think for myself, I was totally engaged. I was committed. But I was, I felt overwhelmed."

Question 1b asked: How engaged do you feel you are now?

Respondents reported that they were even more engaged. They saw that the AI- or asset-based approach made them more hopeful, as shared by one participant who exclaimed, "I think I see the light at the end of the tunnel." Another person stated: "And so now that they have a direction of knowing that we can do something more positive, we can set a goal and actually achieve that goal, makes me feel a lot better about the ministries in this church."

Question 2 asked: Describe a time during the strategic planning process when the planning team was working at its best?

Many mentioned the meeting where the strategic planning document was finalized as the time the team was working at its best. One person shared that it was a culmination of all the hard work that had been done before and that they were all invested in creating a great end product. Even though there was a lot of going back and forth about specific language, they were all able to respect each other's opinions and focus on completing the task. One member stated

I think, somebody mentioned the dynamics of this process here. I think, for me, I know better. I threw all my methodology around navigating and brainstorming away. It was very organic. And very, I mean, we talked all over each other. I mean, and I sat back for a second and thought we all know better, but I just think everyone was so excited to be a part of it and wanted to create something that was extremely exceptional, and it worked.

Question 3 asked: What was the biggest success the strategic planning team experienced?

One person shared, and many others agreed, that the biggest success the strategic planning team experienced was the completion of the strategic plan document. Another success shared was that the team was able to get along. An interviewee responded:

That we all got along. Even with the process of giving and throwing out their ideas today, no one said they had to go my way. You know. It was more like whichever way you want it. The fact that we got along through the whole process.

In agreement, another participant shared: “Absolutely. The ability to agree and disagree. That whatever anyone had to put in, it was important. It was considered. Everyone was thought about. Even if it was discarded, but it was entertaining.”

Question 4 asked: What are some opportunities to improve the next strategic planning process?

Many thought that the strategic planning process went well and did not give specifics about how to improve the strategic planning process for next year. However, participants did share that they felt the process would get better with time as people became more familiar with it. One noted:

This is the year, 2012, we’re going to have our, I guess, stumbling blocks or we’re going to learn from, you know, dealing with different leaders, getting them on. By the time we are done with 2012 and 2013 rolls around, it will be so much better because we would have learned how to train better to get the leaders on board and we’ll move forward.

Another commented, “But by the end of the three-year run, it would gain more familiarity and it would be a value and going forward to not pull away from. It’s part of how we do things.”

Question 5 asked: What did you learn about yourself during the strategic planning process?

Participants noted that the AI strategic planning process helped them to be effective not only in completing the strategic plan, but also with their own personal lives. It helped them to focus on what was working rather than what was not working. Also, participants shared that it gave them a more positive outlook on what the church could accomplish. Comments included

So far I have been able to glean so much that it hasn't only helped me in coming to, umm, participate in the team effort but it has helped me through my life in planning different things. So this has been a very enabling tool for me in life. And even at this age.

But even in getting involved and doing the leadership things that I do, I still didn't see a major push. I didn't see the potential for major change. This process has given me that. Now I see a potential for real change.

Question 6 asked: Imagine that it is three years later. Where do you see Friendship Baptist Church?

Participants had very hopeful and positive visions for the future of FBC. Some of the key points shared were that there would be more engagement of congregation members, an increased level of intimacy and openness in the culture of FBC, a more strategic approach to the business meetings, and more diversity in the congregation and leadership. One member stated: "I think in three years we should see thriving ministries—where people want to be engaged, where people want to serve." Others shared:

If we do what we're saying we're doing, I think in three years I hope to see a church where people do not look just like me. I want to see other people, other faces in this church if we are enlarging, bringing in the community, if we're enlarging our territory.

I have a vision of a business meeting that happens in the round and it isn't in an accordion-style sanctuary. But it is about sitting face to face among one another, thinking strategically about all stuff.

In three years, my vision is that this process will "take" and that we will have executive board meetings where people are really bringing, it's like

what . . . is saying, really bringing ideas and that they're not coming because it's something that they must attend. It's mandatory so let's get this over with. But they're coming with enthusiasm based on the fact that they have been trying to follow through on the vision and that they are actually serious about the things that they committed on those tools.

The major themes that emerged from the interviews were a concern for things that have held the church back in the past and a hope for the future.

Many of the interviewees mentioned practices or issues with how things have operated in the past. While the AI approach asked participants to focus on what was working, it was difficult for them to completely ignore the problems that needed to be addressed. However, there was enthusiasm and hopefulness about what the future held. They knew that there was a lot of work to be done, but the AI process allowed them to focus on the possibilities rather than the deficits. As one participant shared, "It's about moving forward rather than looking backwards." A secondary gain from conducting the interviews was that answering the questions reenergized the SPC members. Anecdotally, an increase in energy level and more positive body language of the respondents was observed as they were asked to reflect on the strategic planning process experience.

Chapter 5

Discussion

The goal of this action research was to design and implement a strategic planning process at FBC using an AI approach. The primary and secondary research questions of this study were as follow:

Primary question: What is the impact of using AI as an approach/philosophy to implementing a strategic planning process at FBC?

Secondary question: What does an AI-focused strategic planning process look like within a church?

This chapter summarizes the key findings from the previous chapter and provides a discussion of the project conclusions. Recommendations for the church and for organization development practitioners are provided. Limitations of the study are presented, and suggestions for future research are given.

Summary of Findings

To answer the aforementioned research questions, the initial congregation survey served to assess the health of the church from the perspective of its congregation members prior to implementation of a strategic plan. Feedback forms served as a fidelity check for SPC members' understanding of AI prior to developing and implementing an AI-focused strategic planning process. The field notes and SPC interviews sought to assess the impact of AI as an approach to strategic planning and document how the planning process was implemented.

The data from the initial congregation survey showed that, overall, members perceived FBC as a "healthy" church, evident by respondents'

assignment of high ratings (scores of 4 or 5 out of 5) to FBC for each of the characteristics of a healthy church. Quality of worship, hospitality, and spirituality of FBC received the highest ratings while advocacy, accountability, and diversity received the lowest ratings. Additionally, respondents reported that the top three elements of church experience were evangelism, families, and tradition. However, other core elements needed for spiritual growth (obedience, preaching and teaching support, and Bible knowledge) received the lowest ratings.

The data from the AI training feedback form showed that the majority of SPC members (92% or more) thought that they understood the concept of AI as a theory and a process and that they could apply the concepts of AI to their daily lives and a strategic planning process. SPC members also indicated that they found the positive focus on possibilities and the future as well as the organized approach to planning the most useful pieces of the training.

Field notes documented the strategic planning process. SPC members designed and implemented their own AI-focused strategic planning process which incorporated the elements of the Four-D AI model. As a part of their AI-focused strategic planning process, the SPC also launched a campaign entitled “Imagine,” which sought to engage the congregation in the planning process. After five meetings, SPC members completed a strategic planning document and a vision statement that incorporated SPC members’ and the congregation’s “dreams” for the future of FBC. The vision statement reads: “Friendship Baptist Church will be a visionary church enabling a diverse population to strengthen

their relationship with God for the purpose of changing the world through the advancement of God's kingdom.”

Data from the interviews conducted with SPC members showed they remained excited and engaged in the strategic planning process, even though they felt overwhelmed and concerned about past challenges of the church at times. Interviewees shared that they maintained their level of excitement and encouragement about the future of FBC even after the completion of the strategic plan document. The major accomplishments of the AI-focused strategic planning process expressed by interviewees were the completion of the strategic plan document and the maintenance of camaraderie and respect throughout the planning process.

Conclusion and Discussion

The summary of study findings led to two conclusions:

1. Positive Impact of AI—This study concluded that AI had a positive impact on FBC's strategic planning process. Specifically, the four benefits of engaging in an AI-focused strategic planning process were (a) SPC members were engaged and excited throughout the development and implementation of the strategic planning process, (b) SPC members worked effectively as a team to accomplish their tasks, (c) a strategic planning document and a vision statement incorporating SPC members' and the congregation's "dreams" for the future of FBC were completed, and (d) FBC has become a planning church committed to thinking strategically about the future. Evidence from field notes and interview notes documenting the planning

process and SPC members' participation and perceptions of their experiences support these findings.

These findings are also consistent with those found in other studies where AI was used in a strategic planning process (Brown, 2009; Messerschmidt, 2008; Roehlkepartain, 2007; Stavros et al., 2003). Noted benefits of AI identified in these studies include effective teams; formulation of plans or strategies focused on assets; engagement of all levels of the organization; increased buy-in from stakeholders; and having a planning process that incorporates and connects values, vision, and mission statements to strategic goals, strategies, plans, and a positive and objective review of goals.

While the benefits of an AI-focused strategic planning process were noted during the development of FBC's strategic plan, strategic planning does not end with the development of the planning document. A well-developed strategic plan does not always lead to successful outcomes (Bossidy & Charan, 2002). For this reason, traditional strategic planning processes have received criticism for leading to the production of a cumbersome document which ends up sitting on a shelf unused (Mintzberg, 1994). FBC will need to continue to incorporate AI throughout the planning process while also incorporating promising practices for successful execution to ensure that the benefits of AI extend to implementation.

2. Cultural Incongruence—This study also concluded that FBC is in a state of cultural incongruence. Culture, along with communication, is

an important factor that impacts execution of a strategic plan (Bossidy & Charan, 2002).

Culture is defined as

A pattern of shared basic assumptions that the group learned as it solved its problems of external adaptation and internal integration, which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. (Schein, 1996, p. 8)

Schein (1996) proposed that culture can be analyzed at three levels: artifacts, espoused beliefs, and basic underlying assumptions.

Using Schein's model of organizational culture to assess the culture at FBC, there were inconsistencies between the church's basic assumptions and core values and its espoused values, particularly around what is important for a church experience. This was evident in the presentation of the congregation survey results, where members in attendance were surprised that elements touted as being most important to the church experience and spiritual growth (obedience, preaching and teaching support, and Bible knowledge) received the lowest ratings on the survey. Similarly, the mission of the church which reads "FBC exists to glorify God by lifting up the name of Jesus through Fellowship, Stewardship and Discipleship . . ." is also in conflict with the ratings on the aforementioned elements of church experience.

If left unaddressed, the gap between the espoused beliefs of the church and the underlying assumptions and values of the congregation could have a negative impact on its ability to achieve

the goals of the strategic plan. The culture may shift in a direction that is not aligned with the direction of the church. However, some of the actions that FBC has taken as a part of the strategic planning process, such as the “Imagine” campaign and the sermon series on the strategic goals, may help to close the gap. These strategies are working to change norms within the church and trying to create a common understanding of the values among the congregation members. Schein (1996) shared that it is through changing the individual and group norms that one ultimately changes the culture of an organization.

Recommendations to FBC

The study provided three recommendations to FBC:

1. **Assess Culture**—FBC should consider conducting further analyses of the church culture and implementing strategies to align the culture with the strategic plan. The Organizational Culture Assessment Instrument (OCAI), developed by Cameron and Quinn (2006), can be used to diagnose the current culture of an organization and its desired culture. It consists of six items that are designed to assess six key dimensions of organizational culture, which include dominant characteristics, organizational leadership, management of employees, organization glue, strategic emphases, and criteria of success. Changing culture is challenging because it requires a shift in the underlying assumptions of the organization as well as the individuals within the organization (Schein, 1996). However, it is

necessary for the execution of the strategic plan. If the culture of the church does not support the changes proposed in the strategic plan, it will not succeed.

2. Focus on Execution—FBC should consider implementing promising practices related to the successful execution of a strategic plan.

Execution: The Discipline of Getting Things Done (Bossidy & Charan, 2002) shares that the leader is responsible for successful execution and outlines seven building blocks that leaders must utilize to achieve this goal. They include knowing their people and their business, insisting on realism, setting clear goals and priorities, following through, rewarding the doers, expanding people's capabilities, and knowing oneself. Developing double-loop learning processes (Argyris, 1977) can also assist with successful execution of FBC's strategic plan. The leader, in this case the pastor, should ensure that performance measures are set so that the church can monitor how well the change plan is being executed and how effective it is in resulting in the intended outcomes. Also, the pastor should set a tone that allows for questioning underlying organizational policies and objectives. This second phase of inquiry is what constitutes double-loop learning (Argyris, 1977). In other words, as the church implements its strategic plan, it should ask not only whether it is working, but also if it is what the church should be doing. For example, if there is misalignment between church policies and objectives and espoused beliefs and values, then this should be

confronted. Otherwise, the church may continue to keep fixing the surface issue and miss the real problems that inhibit successful implementation of the plan.

3. Improve Future Planning Processes—FBC should consider improving future planning processes by including more opportunities to engage the entire congregation, especially the youth, in a more systematic way. One approach is using a search conference, which is “a participative planning method that enables communities, institutions, and organizations to identify, plan, and implement their most desired future” (Bunker & Alban, 1997, p. 34). The search conference takes place in six sessions, which include discussing the turbulent environment, sharing stories about the community’s history, analyzing the current system, developing a vision of what the system would look like at its best, action planning, and democratically approaching an implementation that empowers all parties. These steps are also in line with AI and could be adapted to elements of AI’s Four-D model. At the end of the conference, participants will have acquired an understanding of their role in the change process and a commitment to working together to achieve a shared goal. A similar approach is the AI summit process which also engages the whole system (internal and external stakeholders) but differs in that it takes an intentional appreciative approach to change (Ludema, Whitney, Mohr, & Griffin, 2003). The AI summit consists of four phases: (a) discovering the organization’s core competencies and strengths; (b) envisioning

opportunities for positive change; (c) designing the desired changes into the organization's systems, structures, strategies, and culture; and (d) implementing and sustaining the change (Ludema, Whitney, Mohr, & Griffin, 2009). This process is thought to be different from traditional change processes, such as the future search conference, because it takes less time, increases the organization's confidence, increases access to information, provides a clear understanding of the big picture, inspires action, and sustains positive change.

Recommendations to Organization Development Practitioners

This study offers two recommendations to organization development practitioners:

1. **More Radical Approach to AI**—One recommendation for organization development practitioners conducting similar research would be to explore ways of innovating the traditional approaches to AI. Transformational change has been associated with AI-focused strategic planning processes that employ more radical, improvisational approaches (Bushe & Kassam, 2005). This study attempted to create innovation by modifying the Four-D model to incorporate the phases of strategic planning and describing the interceptions with the dream, discovery, design, and destiny phases. However, implementation was very similar to the traditional approaches. More innovation may lead to increased impact and sustainability of the change.

2. Co-design AI process—Another recommendation for organization development practitioners would be to co-design the AI process with the organization participating in the process. This study found that co-designing the AI process was very beneficial. The SPC stayed engaged and took ownership of the process. Also, co-designing the process allowed for the process to exceed the limited scope of the researcher. Additions such as conducting sermons on the strategic planning goals and launching an “Imagine” campaign to engage the entire congregation were both ideas that the researcher had not initially envisioned but were very beneficial to the success of the plan.

Limitations

There were some limitations to the study:

1. Survey Data—The initial congregation survey used a convenience sampling methodology rather than a random sampling of the entire congregation. Therefore, results from the survey cannot be generalized to the entire congregation. Those who responded may have had significantly different opinions than those who did not, and their opinions may not reflect the perceptions of the congregation.
2. Response Rates—One hundred percent response rates were not achieved with feedback forms or interviews. Some SPC members were unable to complete the AI training feedback form or the SPC interview due to scheduling constraints. As a result, the findings from these two data collection methods may not accurately represent the views and opinions of the entire SPC.

3. **Researcher Bias**—The researcher is a member of FBC and has relationships with leadership and other congregation members. Therefore, some bias may have been introduced that could impact the way participants responded on the feedback forms and the interviews.
4. **Assessing Impact**—The primary research question could not be fully answered due to limitations of the study design. There was no comparison group using a non-AI focused strategic planning process. Therefore, the outcomes cannot conclusively be associated with an AI-focused strategic planning process.

Future Research

This study has extended the literature on the use of AI in the church by documenting the short-term impact that the use of an AI approach to strategic planning had on FBC. However, due to the length of time chosen for FBC's strategic plan (three years), this project did not follow the strategic planning process through to implementation. Future research should track the impact of an AI-focused planning process as the plan is executed to assess whether the excitement and engagement established at the beginning of the planning process is sustained through implementation. Additionally, a post-survey should be employed to assess change in church health as well as attitudes and perceptions of congregation members. This may provide more conclusive data on the impact of an AI-focused strategic planning process.

Most studies that incorporate AI into planning offer participants a one-day training at the beginning of the project. However, one training session may

not be sufficient to sustain the momentum generated following that training. Future research on the topic of AI-focused strategic planning should explore including multiple AI trainings throughout the planning process.

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Appendix A: Appreciative Inquiry Training Materials

Friendship Baptist Church
Orientation and Appreciative Inquiry Training

10:00 a.m. – 10:15 a.m.

Introduction

Continental Breakfast
 Welcome

Presented by: Pastor Lucious Smith

10:30 a.m. – 10:45 a.m.

Orientation

Expectations of Strategic Planning Committee Members
 Review of Timeline

Presented by: Planning Committee Members

10:45 – 11:00 a.m.

Break

11:00 – 12:00 a.m.

AI Training

AI as a Theory
 AI as a Practice

Presented by: Ama Atiedu

12:00 – 1:00 p.m.

Lunch

1:00 – 1:45 p.m.

AI Exercise 1

The Art of Asking the Right Questions

Facilitated by: Ama Atiedu

1:45 – 2:30 p.m.

AI Exercise 2

SOAR

Facilitated by: Ama Atiedu

2:30 – 2:45 p.m.

Q&A

Facilitated by: Planning Committee Members

2:30 – 2:45 p.m.

Closing

Presented by: Pastor Lucious Smith

Activity 1

The Art of Asking the Right Questions: Appreciative Inquiry Exercise

Instructions: Part 1

Break up into pairs and interview one another using the guiding questions below. Capture key notes from your partner's story.

Interview Questions

1. Tell a story of a time when you felt most involved/connected to Friendship Baptist Church? Describe the experience in detail. Talk about what you were doing and who was involved? How did you make an impact?
2. What did you value most about that experience? What did you value about your contribution and the contribution of others?
3. As you think about this experience, what stands out as a core value? What made this experience so special?
4. If you had three wishes for Friendship Baptist Church to be impactful to its members, what would they be?

Instructions: Part 2

After each person has had a chance to be interviewed join another group of pairs and share your partner's story with the new group.

Instructions: Part 3

After everyone's story has been shared, as a group identify the common themes from the stories you heard. From those themes you will develop a provocative statement about what Friendship Baptist Church would look like at its best!

Activity 2:**Strengths, Opportunities, Aspirations, Results (SOAR) Analysis**

Strengths	Opportunities
Aspirations	Results

Appendix B: Congregation Survey

We would like hear to from you about your experience with Friendship Baptist Church (FBC). Your answers will help to inform FBC's Strategic Planning Process. Please select the answers that best represent your response.

Based on your experience at FBC, please rate the following characteristics, with 1 being lowest and 5 being the highest. Circle your answer.

<p>1. LOW SPIRITUALITY God seems distant and uninvolved. Most people in our congregation have little expectation that God will be active in their life or through our church</p>	1	2	3	4	5	<p>HIGH SPIRITUALITY Most people practice prayer, Bible study, and other means of grace on a daily basis. As a result, there is on-going, meaningful experience of the Holy Spirit's activity in our personal and corporate life.</p>
<p>2. LOW CLARITY OF MISSION Only a few people understand God's reason for the church existing. Church is mostly a social place for us and our kind of people. Church meetings deal with routine "business" of fellowship and maintenance.</p>	1	2	3	4	5	<p>HIGH CLARITY OF MISSION Church leadership focus is to reach people with the gospel for redemption. Decisions are based on how it advances God's mission rather than whether it satisfies one's preference and/or will "keep the peace."</p>
<p>3. LOW QUALITY OF WORSHIP Worship lacks energy and seems routine or lacking preparation. We come to worship out of habit – expecting little to happen</p>	1	2	3	4	5	<p>HIGH QUALITY OF WORSHIP Worship is alive, has energy and suits the context. People come to glorify God and to experience a fresh encounter with the living God.</p>
<p>4. LOW FAITH FORMATION Few classes or groups exist or are not serious about deepening one's walk. There is little sense that people are on a journey toward mature faith.</p>	1	2	3	4	5	<p>HIGH FAITH FORMATION We have adequate numbers of classes and small groups studying the Bible and Christian faith to practice their faith daily. Many are growing as mature disciples who witness, serve, lead, or teach.</p>
<p>5. LOW HOSPITALITY We think we are friendly, but we have few repeat visitors. We would rather keep things comfortable than make adjustments to reach others who are different from us.</p>	1	2	3	4	5	<p>HIGH HOSPITALITY We are intentional at making people feel welcome without being too pushy. We willingly seek new ways to reach the people who live in our community</p>
<p>6. LOW DIVERSITY We rarely reach out to people who are of a different ethnic group. Seldom do we have a visitor of a different racial group.</p>	1	2	3	4	5	<p>HIGH DIVERSITY We are intentional to be a racially and ethnically diverse. We regularly adapt ministries to be inviting to people of different backgrounds to meet their spiritual needs.</p>
<p>7. LOW PRIORITY FOR CHILDREN, YOUTH, & YOUNG ADULTS All our children have grown up and moved away. We have no young people who are part of our church.</p>	1	2	3	4	5	<p>HIGH PRIORITY FOR CHILDREN, YOUTH, & YOUNG ADULT We have a good cross-section of children, youth and young adults. We constant adapt our ministries to meet their spiritual needs</p>
<p>8. LOW COMMUNICATION We use word of mouth and announcements to get the news out. People often complain about not knowing what is going on. Little/no effort is made to communicate with outsiders through media.</p>	1	2	3	4	5	<p>HIGH COMMUNICATION We expand our communications within the church family and beyond. We use websites and e-mail to enhance reach. We use newspaper & advertising to reaching people outside our church.</p>
<p>9. LOW ADVOCACY & JUSTICE Our church rarely joins in the cry of those hurt by societal circumstances that diminish the Divine worth of any human (i.e. injustice, bias, racism, poverty, etc.</p>	1	2	3	4	5	<p>HIGH ADVOCACY & JUSTICE Our church is sensitive to the suffering caused by injustice, bias, racism, poverty, and other social ills of our society</p>

<p>10. LOW STEWARDSHIP & GENEROSITY People give little more than their “extra money” to support the church. Giving is viewed as “paying our dues.” Our church has a ‘scarcity’ mind-set that limits ministry.</p>	1	2	3	4	5	<p>HIGH STEWARDSHIP & GENEROSITY People are moving toward giving the first 10% of their income (tithe) and beyond to the work of God with attitudes of sacrifice, generosity and joy.</p>
<p>11. LOW ACCOUNTABILITY There is a low level of commitment on the part of all with many unkept promises. Accountability is avoided to prevent conflicts.</p>	1	2	3	4	5	<p>HIGH ACCOUNTABILITY There is a high commitment for leadership and increasingly among all the members. Accountability is done lovingly with the goal of personal growth and mission advancement.</p>
<p>12. LOW LEADERSHIP Few laity are involved in the ministry of the church. Clergy and lay leaders are focused only on the bare essentials of church operation. Clergy serves as chaplain; most others are consumers.</p>	1	2	3	4	5	<p>HIGH LEADERSHIP Pastoral and lay leadership are focused on helping people identify and use their spiritual gifts to advance God’s mission. Many people feel like “ministers” engaged in Christ’s work of redeeming souls and circumstance.</p>
<p>13. LOW MEMBERSHIP SUPPORT No new member classes or any coordinated planning to bring new members into the life of the church. New members are allowed to “find their own paths” of ministry as it suits them.</p>	1	2	3	4	5	<p>HIGH MEMBERSHIP SUPPORT Clear plans and leaders in place to provide ample opportunities for new members to learn, investigate, and take advantage of ministry opportunities of the congregation.</p>

Please circle the number that best expresses to what extent the following values are important for your church experience.

	Not important	Somewhat important	Important	Very Important
Preaching and teaching support: Communicating God's Word to people	1	2	3	4
Families: People immediately related to one another by birth or marriage	1	2	3	4
Bible knowledge: A familiarity with the truths of Scriptures	1	2	3	4
World mission: Spreading the gospel of Christ around the globe	1	2	3	4
Community: Caring about and addressing the needs of others	1	2	3	4
Encouragement: Giving hope to people who need some hope	1	2	3	4
Giving: Providing a portion of one's finances to support ministry	1	2	3	4
Fellowship: Relating to and enjoying one another	1	2	3	4
Cultural diversity: A variety of race/ethnicity, age, gender, and socio-economic background	1	2	3	4
Prayer: Communicating with God	1	2	3	4
Evangelism: Telling others the good news about Christ	1	2	3	4
Worship: Attributing worth to God	1	2	3	4
Tradition: The customary ways or the "tried and true"	1	2	3	4
Obedience: A willingness to do what God or others ask	1	2	3	4
Innovation: The willingness to take the first step or do something different	1	2	3	4

FEEDBACK

If you could enhance FBC in one way what would it be?

PERSONAL INFORMATION

1. Circle/fill-in your status at FBC and complete the attendance information
Member: #of years: ____ attend ____x's per month
Visitor: how long: ____ attend ____x's per month

2. Where have you extended your hand in service at FBC? Check all that apply
 Ministerial Staff (in any of FBCs ministries) FBC Employee
 Executive Board Trustee Board

3. How many children/youth attend FBC with you? _____

4. What is your race/ethnicity? (check only one)
 Alaska Native or American Indian Asian Black, Non-Hispanic
 Hispanic/Latino Pacific Islander White, Non-Hispanic
 Other: _____ Decline to state Multi-Racial

**Appendix C: Informed Consent Form and Feedback Form for Appreciative
Inquiry Training Feedback**

Principal Investigator: Ama Atiedu

Title of Project: **The Implementation of an Appreciative Inquiry Focused Strategic Planning at Friendship Baptist Church**

1. I _____, agree to participate in the research study being conducted by Ama Atiedu under the direction of Dr. Miriam Lacey.
2. The overall purpose of this research is to gain a better understanding and document the feasibility and impact of implementing an Apperciatiive Inquiry (AI) approach to strategic planning within a faith-based organization, Friendship Baptist Church.
3. My participation will involve completing a feedback form about your thoughts and opinions of the training on AI.
4. My participation in the study will take approximately 5-10 minutes. The study shall be conducted after the AI training in Pasadena, California, at Friendship Baptist Church.
5. I understand that the possible benefits to Friendship Baptist Church from this research are: 1) promotion of strategic thinking, acting, and learning, 2) improved decision making, 3) enhanced organizational effectiveness, responsiveness, and resilience, 4) enhanced effectiveness of broader societal systems, 5) improved organizational legitimacy, 6) direct benefits for the people involved, i.e., improved morale, fulfillment, reduced anxiety (Bryson, 2010).
6. I understand there are no foreseen risks associated with my participation in this study.
7. I understand that my participation is voluntary and that I may refuse to participate, withdraw my consent and discontinue participation, or skip a question on the feedback form at any time without penalty.
8. I understand that the investigator(s) will take all reasonable measures to protect the confidentiality of my records and my identity will not be revealed in any

publication that may result from this project. The confidentiality of my records will be maintained in accordance with applicable state and federal laws.

9. I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact Miriam Lacey at (310) 568-5598 if I have other questions or concerns about this research. If I have questions about my rights as a research participant, I understand that I can contact Jean Kang, Chairperson of the **Graduate and Professional Schools IRB**, Pepperdine University, (310) 568-5753
10. I will be informed of any significant new findings developed during the course of my participation in this research which may have a bearing on my willingness to continue in the study.
11. I understand to my satisfaction the information regarding participation in the research project. All my questions have been answered to my satisfaction. I have received a copy of this informed consent form which I have read and understand. I hereby consent to participate in the research described above.

Participant's Signature

Date

I have explained and defined in detail the research procedure in which the subject has consented to participate. Having explained this and answered any questions, I am cosigning this form and accepting this person's consent.

Principal Investigator

Date

**Friendship Baptist Church Strategic Planning Committee
Appreciative Inquiry Training**

Thank you for attending today's training. Please let us know about your experience by responding to the items below.

Please rate the following aspects of today's training:

	Poor	Fair	Good	Excellent
1. The content presented during the training was...	1	2	3	4
2. The extent to which the training objectives were met was...	1	2	3	4
3. The opportunity for me to participate during the training was...	1	2	3	4
4. The PowerPoint and handouts were...	1	2	3	4
5. The presenter's knowledge about the topic was...	1	2	3	4
6. The presenter's delivery of the presentation was...	1	2	3	4
7. Overall, the training was...	1	2	3	4

Please indicate your agreement with each statement:

After today's training...	Strongly Disagree	Disagree	Agree	Strongly Agree
8. I understand the concept of Appreciative Inquiry as a theory	1	2	3	4
9. I understand the concept of Appreciative Inquiry as a process	1	2	3	4
10. I feel that I could practice the concepts in of Appreciative Inquiry in my daily life.	1	2	3	4
11. I understand how I can apply Appreciative Inquiry to the strategic planning process.	1	2	3	4

12. What did you find most useful about today's training?

13. What additional information or resources would you like to help you better understand Appreciative Inquiry?

**Appendix D: Informed Consent Form and Protocol for Strategic Planning
Committee Interview**

Principal Investigator: Ama Atiedu

Title of Project: **The Implementation of an Appreciative Inquiry Focused Strategic Planning at Friendship Baptist Church**

1. I _____, agree to participate in the research study being conducted by Ama Atiedu under the direction of Dr. Miriam Lacey.
2. The overall purpose of this research is to gain a better understanding and document the feasibility and impact of implementing an Appreciative Inquiry (AI) approach to strategic planning within a faith-based organization, specifically Friendship Baptist Church.
3. My participation will involve being interviewed about my experience with Friendship Baptist Church's strategic planning process.
4. My participation in the study will take approximately 30 minutes and will be conducted after the strategic plan is finalized at Friendship Baptist Church.
5. I understand that the possible benefits to Friendship Baptist Church from this research are: 1) promotion of strategic thinking, acting, and learning, 2) improved decision making, 3) enhanced organizational effectiveness, responsiveness, and resilience, 4) enhanced effectiveness of broader societal systems, 5) improved organizational legitimacy, 6) direct benefits for the people involved, i.e., improved morale, fulfillment, reduced anxiety (Bryson, 2010).
6. I understand there are no foreseen risks associated with my participation in this study.
7. I understand that my participation is voluntary and that I may refuse to participate, withdraw my consent and discontinue participation, or skip an interview question(s) at any time without penalty.
8. I understand that the investigator(s) will take all reasonable measures to protect the confidentiality of my records and my identity will not be revealed in any

publication that may result from this project. The confidentiality of my records will be maintained in accordance with applicable state and federal laws.

9. I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact Miriam Lacey at (310) 568-5598 if I have other questions or concerns about this research. If I have questions about my rights as a research participant, I understand that I can contact Jean Kang, Chairperson of the **Graduate and Professional Schools IRB**, Pepperdine University, (310) 568-5753
10. I will be informed of any significant new findings developed during the course of my participation in this research which may have a bearing on my willingness to continue in the study.
11. I understand to my satisfaction the information regarding participation in the research project. All my questions have been answered to my satisfaction. I have received a copy of this informed consent form which I have read and understand. I hereby consent to participate in the research described above.

Participant's Signature

Date

I have explained and defined in detail the research procedure in which the subject has consented to participate. Having explained this and answered any questions, I am cosigning this form and accepting this person's consent.

Principal Investigator

Date

Strategic Planning Team Member Interview Protocol

1. Reflect on how you felt at the beginning of the strategic planning process.
 - a. How engaged would you say you were at the beginning of the process?
 - b. How engaged do you feel you are now?
2. Describe a time during the strategic planning process when the planning team was working at its best?
3. What was the biggest success the strategic planning team experienced?
4. What are some opportunities to improve the next strategic planning process?
5. What did you learn about yourself during the strategic planning process?
6. Imagine that it is three years later. Where do you see Friendship Baptist Church?