

CHAPTER ONE

Working on Cases

The first part of this chapter is the analysis of a case that occurred a few years ago in a non-conformist church formed by the uniting of Methodist and U.R.C. congregations. It was written by the minister who was central to the events.

I. A CASE STUDY

1. Family Communion

I am the minister of a church that wants its children to feel they are part of the family. Every Sunday morning they join the adults for a joyful culmination to morning worship. On the monthly Communion Sunday this is a little difficult, as their arrival after adult celebration creates an awkward second climax, and the teachers complain that the morning is too long, that they have to miss Communion themselves, and that the children are given strange ideas about a mysterious rite from which they are excluded. The exception is Easter Sunday, when the children are present for Communion, and come forward with the adults to receive a blessing.

Once, when all this was being fully discussed by a teachers' meeting I attended, the teachers started asking why we did not have Family Communion. My wife, who leads the Junior Department, felt particularly strongly about it, pointing out that our two young daughters were able to partake at a local Anglican church and at conferences, and claiming that children in her class feel rejected when they were invited to the Table at Easter only to be refused the bread and wine. I was asked whether I would be prepared to include the children fully in the next Easter Communion. I said that I would if it were left to me, but that this was a question to be opened up at the next Church Meeting; and in anticipation they planned a Junior Church Council which would lead up to an Easter Family Communion.

At the Church Council I brought the matter to the attention of the elders, who considered it carefully. One of them declared herself adamantly against children's partaking, but she agreed with those who thought members would be in a better position to discuss Family Communion if they had experienced one. Accordingly the Council decided to place the issue on the agenda of the Church Meeting in the form of a recommendation: that a Family Communion be held at Easter, in the light of which the question could be fully explored.

At the Church Meeting, however, the subject touched off an explosion of anger and confusion. Five people (two elders, one of whom had missed the

last Church Council, and a teacher who had been absent at the relevant teachers' meeting) opposed the whole idea at length. Children wouldn't understand, would spoil the atmosphere, had to learn to wait; Communion was not to be used as a guinea pig; Church Council had taken unfair advantage by recommending.... Equally impassioned arguments favoured Family Communion, and my wife, with the other teachers of her department, said she would rather keep her class out altogether at Easter than have them dismissed with a blessing. By way of compromise I suggested a family meal of biscuits and squash, but was accused of trivializing the sacrament. I would not allow a vote on the issue, and said that with feelings running so high a Family Communion this Easter would not help any of us. But I did not know how to handle the deadlock. Someone suggested I preach a series about Communion. I agreed, said the discussion would have to be reopened at a later date, and moved on to the next item on the agenda. (A radical proposal affecting the whole future of our church, which was accepted without opposition!)

Since then, there has been a conspiracy of silence about Family Communion. Other discussions (e.g. children's work) have always stopped short of this topic, there has been no comment when the occasional child has taken the elements (including a party of mentally handicapped young people brought by a social worker to that particular Easter service), and I have never felt objective enough to preach my promised series of sermons. Privately one or two people have admitted surprise that all this fret and fever should have been for nothing. Junior Church has ceased the practice of attending Easter Communion for a blessing. And the teachers seem less certain that they have the backing of the members.

This case, like all other cases, tells the story of a causally connected sequence of events. It is the kind of pattern that occurs in every aspect of human life. Workers often talk about critical aspects of their experience in church and community work in this way.

In this particular case the central theme was children and communion. The Junior Church teachers wanted family communions but the consideration of the suggestion split the Church Meeting, and led to an impasse, and now the children are less involved in communion services than before. In fact there was an all-round deterioration in the situation.

There are several equally important people in the events and the case could be analysed from each of their perspectives. As it was written by the minister from his perspective we examine it in relation to him and his thoughts and actions. Examining it in relation to one person (or one centre of co-ordinated activity such as a partnership) is very important. It reflects the realities of life: we are only ever one person; we can exist and act only from the being of one person; we work to change complex human systems from our own complex human systems; the greatest control and influence that we have, therefore, is over one person—ourselves. Analysis and action-plans must take this fact of life seriously if it is to be of any consequence. Even so, people are inclined to talk as though others can be moved around at will in human affairs. "He should do that. She will do this. They must be made to do that...." That is to treat

people like chess pieces and they are anything but that; it is to turn the story of the case into a fairy story. We will stick with reality, with one non-exchangeable centre of being and doing, the minister, the worker.

Many different groups of people—women and men, ordained, religious and lay from all the main denominations and working at different levels—have at various times discussed and analysed this case. They all identified with the essential dilemma of the minister, including Roman Catholics whose eucharistic tradition is so different. In what follows I am drawing on the principal points made in these discussions.

The discussion of the case is set in the period a month or so after the Church Meeting.

2. The Diagnosis

There are two aspects to this diagnosis: an assessment of the way in which the minister contributed to the deterioration in the working situation and relationships; and what is still "going for" him. Sometimes when we are diagnosing cases we can see what was not helpful without knowing what else could have been done. Indeed we may feel that what was done is just what we would have done. Alternative and better possibilities invariably emerge from considering such incidents. And it is seeing the kind of action we think would have been more likely to achieve the desired objectives that shows up the inadvisability of what was done or not done. So diagnosing is as much about discovering what could or should have been done as about what should not have been done: discerning and defining the one helps to discern and define the other. Generally speaking, people are more prepared to make constructive critical judgements of what a worker did/did not do when they see a better way in which s/he could have acted. Up to that point they are inclined to sympathize with the worker and resist any adverse judgement upon the action taken and its effects with statements like, "But s/he could not do anything else!" "What else could s/he have done, for goodness sake?" Therefore, where necessary in the diagnosis that follows, the critical assessment of the minister's action, given in emboldened type, is followed by notes about action more likely to have had good effects.

An Assessment of What the Minister Did

What was it then, that the minister/worker did or did not do which in our judgement contributed in any way to the *undesirable* outcome?

His Initial Response

He did nothing about the feelings of which he was fully aware of dissatisfaction with the arrangements for children being present at the communion and the nature of their participation until his hand was forced by his wife and the teachers. Then he made an immediate response to a

particular solution suggested at a teachers' meeting from which the one teacher who opposed it was absent. In that response he sided with the teachers and their proposed solution and inferred lack of sympathy with any who might oppose the proposal. He colluded with them in planning a course leading up to Easter Communion.

By allowing things to drift he lost the opportunity to define the problem and to work out how best to get the theological issues and the practical implications of such a sensitive subject considered and resolved. One of the consequences of this was that he had to make his initial move in response to the problem through his response to a solution suggested at a teachers' meeting. This prevented him from making his response freely after careful thought about the situation and the full range of options which would have been open to him. Moreover, he had to make his response under considerable pressure from his wife and the teachers to accept their solution—circumstances not conducive to deciding just how to tackle such a difficult issue. It is not surprising that he sided with the teachers and that he did let them act as though the outcome was a foregone conclusion—but that is a provocative act in an organization in which some members cherish their privilege and take seriously their responsibility to make decisions freely on all such matters.

So he had lost the opportunity to approach the whole situation freely and independently. Possibly his preoccupation with the "radical proposal" meant that he simply had not had time to give to this issue. Nonetheless he could have responded by saying that, as the matter was a weighty one about which people would have deep and conflicting convictions, he needed to think how best to get all the ideas on the subject and the theological and practical issues considered. Also he could possibly have assured them that he was very deeply concerned about the issues they had rightly raised and that he would be in a much better position to act in relation to them when the decisions had been made about the "radical proposal". Meanwhile, he could have suggested they discuss their ideas with the absent teacher. Thus he would have identified with their concern, taken them and their suggestions very seriously, got them to consult their colleague and got himself into a position from which he could decide how best to act in relation to the whole situation and for the common good.

At The Church Council

He brought the matter to the attention of the elders. He was party to a recommendation going to the Church Meetings advocating that the church try out the idea for a Family Communion on Easter Sunday; i.e. carry out an experiment.

Taking the idea to the Church Council himself meant that he personally became more and more closely identified with the idea. This made it difficult for people

to question or oppose the idea without feeling they were taking sides against the minister. The communion issue became a personal issue, even if by default. Moreover, the recommendation that it be tried out meant that several issues were now in the discussion: that children take communion; that there be a family communion on Easter Day; that this be treated as an experiment. All too easily these issues were confused, not least because of the emotions associated with the substantive issue and the feelings raised by the way in which the suggestion had been processed. The experimental method seems inappropriate. It is irreversible: once children have taken communion they have taken it and crossed the line of conviction that they should not take it until they are older; and people suspect it because they see it as a subtle pseudo-scientific way of imposing innovation, "the thin edge of the directive wedge."

Then there is the question of the ministers taking sides. Clearly, theologically and liturgically he favoured children's participating in family communions. To feign that he was neutral would be wrong and unhelpful but he could have refused to take sides. The stance that would have enabled the minister to be most helpful was one in which he declared his interests and said that he wanted all views, including his own, to be properly considered and respected in the search for ways of resolving the differences which would enhance sacramental worship for everyone. Such a stance was implicit. That is where he wanted to be. He never quite got there. Three things could have helped him to do so: greater clarity of role and function in relation to this issue; not taking sides; making explicit the stance he was taking and that he was taking it because it was the position from which he could best minister to the church as a whole on this issue and to each theological/liturgical faction within it.

At The Church Meeting

He was party to such a vital subject being brought to a meeting without a proposed way of tackling it and to placing it on the agenda before an item known to be of great importance which presumably was expected to be discussed at length.

Presumably he had to bring it to that meeting because of the timetable he had accepted from the teachers. All other things being equal, it might have been better to give notice of the subject and ask how and when they could give it the kind of consideration it warranted. If this were not possible, he could have suggested that they consider things in some order and in relation to purpose, belief and their two-denomination context: the nature and importance of communion to us; children and communion; experimenting with different kinds of services; the family communion on Easter Day. That would have given a framework, order and shape to the discussion. During the earlier stages the emphasis could have been upon building up understanding and acceptance of each other's views as a basis for finding a mutually acceptable way forward.

He did not get them to consider their differences in relation to what they had in common.

He trivialized the issue and caused offence, however inadvertently, by suggesting an orange-squash/biscuit love-feast compromise.

What they had in common was a high doctrine of and reverence for the communion service. The enormous spiritual significance of it for them led them to two quite different convictions: that children should have access to this vital religious service as soon as possible; that they should have access only when they understood what it is about. He did not make this point. Establishing areas of real agreement and common ground is of enormous importance in working where there is faction or the possibility of it. The suggestion about biscuits and squash was sacrilegious. Equally he did not get them to draw out in an objective way the differences between them.

He used his position as minister and chairman to take "control" of the meeting by making strong definitive interventions when he just did not know how to handle the deadlock, viz:

- he would not allow a vote;
- he quashed the idea for a family communion at Easter by telling them that with feelings running so high it would not help any of them;
- he himself accepted the first positive suggestion (that he preach a series of sermons about communion) without testing it out for acceptability and seeing what other ideas members might have;
- he closed down the discussion by saying that it would have to be reopened at a later date and by moving on to the next item on the agenda.

There are times when it is right for ministers and those in the chair to take directive action of this kind. It is required and expected of them. They are often the only person in a position to do so. But was it right for him to do so in this situation? I think not, even though I can see myself doing it in panic and desperation. There are times when it is right to mask uncertainty, but there are considerable dangers in acting as though you know what you are doing when you do not. What else could he have done? He could possibly have said something like this: "I just do not know what is the best way to resolve these issues. One idea is that I preach a series of sermons as a basis for further discussion. There may be others. I do not feel that we should take a snap decision by voting. That might make things worse. Clearly we are considering a very important issue about which we all feel deeply. I feel that we need to find a time when we can do justice to the issues that have emerged and decide what to do about the suggestion for an Easter Communion. What do you think/feel?" Such an intervention changes the focus of the discussion from children and communion to how are we (people and minister, not simply the minister) going to resolve the deadlock. It legitimizes not knowing what to do and gives

everyone a chance to work at it together. It invites them to make decisions about process as well as content and the process by which they resolve the issues will profoundly affect, positively or negatively, the spiritual interplay between their life as a communion and sacramental acts of communion. Making such points could introduce new theological dimensions to the discussion. Of course, all this is with hindsight. But then had the discussion been postponed there would have been time to prepare such an input. What glorious theological possibility in this encounter!

After the Church Meeting

He lets things drift again: he does not preach the sermons; he tempts providence by allowing handicapped and other children to take communion; he does not arrange for further discussion; he rests uneasily in what one or two said about the "fret and fever" having been for nothing.

History seems to be in danger of repeating itself, that is up to the point of his writing up the case and seeking help with it.

Throughout

He tried to work out everything in public.

Some private discussions about the issues and how best to get them considered openly and constructively could have led to better discussions in the Council and the Church Meetings. But possibly he had no other choice simply because of the sheer pressure of events and of his work load! In fact he did not let things drift as some suggested; he had no option but to let some things drift and this was one of them! That meant he had to deal with them in public and that brings us to the next points.

He was not able to "steer" the proposal through the turbulence of the public discussion and he did not get others to help him to do so.

It was the combination of these that created difficulties: if he had done the second, the first would not have had the same effects. An argument for collective effort.

He did not get people testing out and working on the possible positive and negative effects upon the church community as a whole of considering the proposal for a family communion and of having one at Easter.

The discussion was child-centred, child/teacher/parent-centred rather than church-communion-centred. The following question could have set the discussion in the wider context: If the proposal was implemented, what good and bad effects do we think it would have on different members and parts of our church community in relation to our purposes in general and our common

desire that children really feel that they are part of the church family? Follow-up questions could be: Can we reduce the bad effects to a tolerable level? If so, do we want to implement the idea? If not, what can we do in relation to the continuing felt needs that led the teachers to make the suggestion?

What is "Going For" the Minister

First reactions after such an assessment is that there is not much "going for" the minister! This mirrors feelings generated by such incidents. They are deceptive. In fact there are many things going for him, some of which are as follows:

- The minister is making a very serious attempt to resolve the impasse. He has written down the story in an open and manageable way in an honest manner; not an easy thing to do when the events evoke strong emotions and possibly self-rebuke. He has sought help to think through what he should do next. He is not defensive—yet! And there is time to think and act.
- Members of the Church Meeting have strong beliefs which they can articulate and the communion is very important to them.
- Things have calmed down. The church and the minister and his wife have been able to take the event and contain the argument; immediately after the fraught discussion about communion the Church Meeting acted unanimously in relation to a radical proposal; no one has resigned office or left the church; the teachers are still teaching; subsequently handicapped children have communicated without further argument.
- The initiative is with the minister and he has two possible openings: sermons and a further discussion.
- The minister has opportunities to promote discussion on what could be highly significant issues: the sacrament and ways and means of discussing and deciding about such things most likely to build up the church communion. Such discussions combine the pragmatic (procedures and processes) with the theological.
- The minister cares—cares about *all* the people, adults and children. He wants to do the right thing and build up the good relationships. He now knows more about the church and their feelings and about himself as a worker. He is honest and resilient.

3. Towards redeeming the Situation

But what can the minister do now to redeem the situation? Precisely what does he need to do with whom, in what way and to what end? Amongst the

proliferation of ideas that have emerged from the analysis there are some that are persistent. Only the minister, of course, can say what he could do and what he thinks would work. Our suggestions must be tentative. Then again, whilst objectives, approach and first steps can be planned in some detail, second steps will be influenced by what happens during the first round of action.

Do Some More Homework

Those who analysed the case agreed that the first thing that the minister had to do was some more homework. (A surprising number of them, however, only saw the significance of this when others had mentioned it.) Privately, on his own or with consultancy help from an independent colleague or consultant, he needs to work at several things.

First, he needs to work out his overall objective for his next phase of work on the family communion saga. Creating a better atmosphere could be very much on his mind: a "conspiracy of silence" is not a good ambience in which to minister. Achieving this is necessary and desirable, but not at any price. There are other things to be done. Those who differ need a better and more sympathetic understanding of each other's beliefs and convictions and their common ground (a high doctrine of the communion). Then they need to bend their minds and wills to find a way forward to which all can commit themselves and which contributes to making and maintaining a fellowship conducive to communion. Getting a better atmosphere is an integral part of that. Internalizing this objective so that it really does guide thought-out action is important: it is so easy to be deflected from it. Formalizing it in the following way could help him to do so:

To get all concerned to so work at the theological and practical issues that they understand and love each other more and find mutually acceptable ways of resolving their dilemma which help them to achieve their purposes for adults and for children in the church.

It took quite a bit of effort to clarify this—and I am not emotionally involved.

Second, sorting out his own thinking would help him to give himself more freely to helping others to sort out their thinking. (His thinking, that is, about communion and the optimum human conditions for it to be effective.) This leads into a third thing: his stance in these particular discussions and what his main job is in relation to them. Earlier we touched on this in the assessment of the case. Whatever else he does, he will need to make significant contributions towards "facilitating" the subsequent thinking and deciding. To do this he has to be non-directive. Some felt that an independent facilitator was called for. Others saw the advantages of minister and people "facilitating" each other.

Fourth, he needs to decide how he is going to cope with any residual feelings he may have and just what apologies he needs to make to whom about what.

To assume responsibility for things for which he was not responsible reduces the significance of his own apology and trespasses upon the responsibilities others properly had for what went wrong. Blanket apologies are to be avoided: on that everyone spoke with some feeling. There is much more redeeming and reconciling power in specific apologies than in general apologies.

Fifth, he needs to think out what action he is now going to take with other people (what has been suggested already in this section is action of an energetic kind!). Many suggestions were made as we speculated about the possibilities. These are discussed below.

Clearly, hard thinking, reflection, prayer and much courage are required to do all this homework as working through these issues makes heavy demands upon the soul, the mind and the will.

4. Action Suggestions

There was strong support for the minister starting by discussing things with his wife. The idea of doing his homework with his wife did not seem to be a realistic possibility because of the way in which they had been involved. Much is at stake for both of them as husband and wife, as parents, as a ministerial couple, as teacher and minister. The problem is how to ensure that any discussion that they might have is creative. Here we mention two of the many things that will determine whether or not it will be. Timing is the first. He will know the conducive circumstances. It is up to him to create them or to seize the right moment when it arises (the preparation that he has done means he is in a good position to do that). The second is the use to which he puts his own thinking. He could share it with her fully or summarily or he could think through the events from her perspective—as we have done from his—and then from their joint perspectives or he may start with what he proposes to do and why. The minister alone has the information to decide which of the many permutations is most likely to work. Attention needs to be given to both these points—timing and the use of prior thought—in all the encounters.

After that there was a proliferation of ideas about those with whom he ought to discuss the situation—members? parents and children? teachers? the Council? the Church Meeting?—and about the order and manner in which he ought to do so. Setting these out as possible alternatives and considering the pros and cons of each of them enabled members to refine the various approaches and to settle on the one which they thought most likely to be effective. But, again, they realized that their suggestions must be tentative because they did not have the knowledge of the situation and the people which would enable them to make a situational judgement about them being a “fit”. A possibility that emerged from all the suggestions was that the minister open up the discussion again with the members of the Church Meeting. Some thought that he ought to start with people informally, others with the teachers or the Council. But it was to the members of the Church Meeting that he said

that the discussion would have to be reopened at a later date. Starting the discussion elsewhere could be misunderstood and resented as another attempt to force the issue. The idea was that he make a statement to the Church Meeting saying that he has been reflecting on what happened and has seen that they had been united in their high doctrine of the communion and divided in what that means in practice, that he believes that much could be gained by working together at the theological and practical issues; that as that is no easy thing to do they need to consider carefully whether or not they want to do so and, if they do, they need to think carefully about how they could do it so that the outcome is most likely to be positive and not to proceed until they were agreed how to go about it and how they would approach any difficulties that occurred. He could underline this last point by saying that he did not want to spring this matter on them, nor did he want them to drift into a discussion. So what he was saying was by way of notice of a discussion to be held at a future meeting to be determined by them, i.e., a discussion about discussions. This would provide opportunities for people, individuals and formal and informal groups to reflect and come prepared for the discussion. This would be the point at which he could make his apologies. If the meeting agreed with his suggestion he could say that he was concerned to get all points of view considered and taken into account. Would the meeting appoint a small group representative of various ideas and groups to meet with him for the sole purpose of working out how best to get the issue discussed?

Leading the discussion about taking these steps could be tricky. He needs to generate and maintain an objective, emotionally sensitive but low-key atmosphere. Two of the possible dangers are: that they drift into an unhelpful discussion of the issues; that in attempts to prevent this he frustrates one of those moments when much is transacted in a short space. Awareness, vigilance and judgement are called for.

Should he give notice of this discussion on communion or not? A bald statement of the item on an agenda sent out in advance could cause people to come prepared to fight their corner again. A full statement could be helpful. If this is not normal practice possibly the best thing is to introduce it at the meeting.

There may well be officers of the Church Meeting or the Council or the Teachers' Meeting with whom it is normal practice for the minister to discuss business in confidence before bringing it to any or all of these meetings. If this were so, he could discuss his plans and ideas with them and seek their advice. They could then help to promote the kind of discussion required.

So far we have been considering procedures most likely to promote processes of development. As suggestions are put to people their attention will focus on the subject-matter. They will be trying to assess the effects of working on the issues: Will it improve things? What's it all about anyhow? What do I/we/others have to gain or lose? Will I gain or lose? Will I/we be able to avoid trouble? Will it be worth all the effort? So they will want to know just what

they are being asked to work on. Basically it is about how to meet the spiritual needs of children through communion services in such a way that the adult members feel good about what happens and therefore generate a human and spiritual atmosphere conducive to all concerned receiving maximum benefit and blessing from the services. So it is about building up the communion of the Church through communion services. Doing that inevitably involves considering all kinds of questions about liturgy and theology, growth in faith and Christian education. It could be an education for all concerned. It also raises questions about how the church members discuss and decide things, especially tricky questions to do with differences in faith, belief and practice. Consequently the agenda concentrated in "Family Communion" is of enormous importance to the well-being of the whole church.

Assuming that the members need more information and time to make informed decisions, they may want from the minister or the working group a description of what they would need to consider, in what way and to what end, i.e. information about content, process and objective. Also they may want to consider the possible effects of not tackling the issues in relation to their responsibilities for the spiritual needs of all concerned and implicated. It might help to know at this stage under what conditions the members of the Church Meeting would consider working at this subject-matter. This would help the minister/working group to try to work out ways and means of meeting the conditions. There are important aims implicit in all this. They are for the minister to get the Church Meeting to take more effective control of its affairs and to accept and discharge its responsibilities for the spiritual well-being of the church, to build up the confidence of its members and to build up the working relationship between the Council, the Teachers' Meeting and itself.

If and when it comes to working out the next steps it would be necessary to consider amongst other things: the aims of discussions; what use if any to make of the analysis or the means of analysing used here; the kind of specific questions to be asked and in what order; the time-scale.

II. WHAT ARE WE LEARNING FROM THIS CASE STUDY?

Examining what workers have done/are doing in specific situations through case studies serves three purposes at the same time. Foremost of these is to discover what action the worker should now take in relation to the specific situation. The second is to clarify things in the working situation which just have to be taken into account when working for development, what Batten calls the "authority of the situation". The third is to discover how the worker could do things better and become a better worker.

The first of these is the explicit purpose and the one to which we have devoted ourselves so far. Much emerged related to the second purpose, for example the consensus about the importance of communion and the significant differences

about children's attendance. In relation to the third purpose, the case shows how easy it is to trip up and to be tripped up! The minister was experienced, highly committed to working with people and keen on participation. He needs to avoid using trivializing words such as "squash and biscuits", which are so emotive. He needs to make alliances rather than "hidden coalitions".¹ He needs to determine how he can work with people who are expressing different opinions strongly and emotionally and taking up opposing positions, and to do so when he has a complex of relationships with the people concerned and the discussion is fast, furious and penetrating. As chairman, minister, husband and father he experienced a bewildering confusion of pressures emanating from several sources: the loyalties he had to his wife, to the teachers and to the elders, to the children; the theological and practical complexities involved in considering the pros and cons of children at communion; and the responsibility he felt to help the meeting to decide on a course of action mutually acceptable to the factions. What are the basics of an approach which help him to deal with such situations? He needs to know about working with groups in faction² and what is involved in taking things from one group to another so that there is accumulative creative participation. This brings us to the importance of "private" and "public" work and the interplay between them.³ The quality of thinking on one's feet in meetings is related to the quality of one's thinking on one's seat in the study. These things are considered in the other parts of this book.

III. ESSENTIALS IN WORKING ON CASES⁴

Now we turn from the study of a particular case to the study of the essentials of the process of examining cases in order to help readers to make a critical assessment for themselves of the value of the approach for them and their work, to reject, adapt or adopt it and to put it into practice in their own way.

To use this case-study method to best effect on the actualities of church and community work it is necessary to have a firm grasp on the essential stages.

They are:

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| Stage 1 | Getting a clear statement of the case story. |
| Stage 2 | Defining the overall change for the worse and for the better that has occurred. |
| Stage 3 | Diagnosing what went wrong from the worker's perspective and assessing what action the worker could have taken to influence the course of events for the better. |
| Stage 4 | Assessing the strengths and weaknesses of the current working situation and determining the implications for the worker. |

- Stage 5 Thinking out precisely what action the worker can now take.
- Stage 6 Learning as much as possible from the experience in order to inform and improve the way in which the worker goes about things in the future.

Stage 1: Getting a clear statement of the case story. Cases are descriptions of things that have actually happened. They are about situations in which workers are not achieving what they set out to achieve. They are about workers who find themselves in situations and relationships that are debilitating and distressing. They are stories told from a worker's perspective. To work on them constructively the case story needs to describe several things: the initial situation and the worker's objectives; the key events in the order in which they occurred; precisely what action the worker took and why; details of the significant responses made by others; an assessment of the final situation; and a statement of the worker's dilemma, concerns or difficulties. Generally speaking it is better to write the case in the first person: "I wanted to . . .", "I did not . . .", "I aimed at", "I thought/felt/said/did". Sometimes I find I gain objectivity by using the third person and describing myself in different ways: "George said" or "Lovell did" or "The minister/chairman/worker felt". It all depends upon how I am feeling about myself and whether I am looking back over my actions with sympathy, disappointment or anger.

Writing the story down in this disciplined and structured way is no mean achievement, especially when doing so recalls strong emotions and a sense of failure. However, it is healing and helpful to put it on paper no matter how painful and costly it might be. Emotions are released and new energy begins to flow as workers feel that they have put things in a workable shape, they have got a hold on the situation and they are working at it in an orderly way. All too easily and often, however, these feelings can be eclipsed by feelings that the situation is hopeless. What buoys me up when that happens is that I have found something good always emerges from working at these cases.

Stage 2: Defining the overall change for the worse and for the better that has occurred. Overall changes for the worse and for the better that have occurred can be assessed by contrasting the situation as it was at the outset of the case with what it was at its conclusion; by comparing, for example, changes in relationships, attitudes, morale, willingness to effect change. The aim is to get a realistic view of "success" and "failure" (especially when the worker feels "a failure") and of positive and negative side-effects. Analysis and remedial action must take these actualities into account.

Stage 3: Diagnosing what went wrong from the worker's perspective and assessing what action the worker could have taken to influence the course of events for the better. Stage 2 defines what went wrong. Stage 3 makes

explicit what the worker contributed to things going wrong. This involves being precise and specific about the when, where, how and why of his/her contributions to the bad effects. And, as we have seen, it involves exploring alternative actions likely to have avoided the undesirable outcome and to have achieved the desired objectives: a painful process, but one which reveals much of value for remedial action and future practice. This part of the analysis is best effected by making a series of statements beginning with either "S/he did . . ." or "S/he did not . . .", each statement being about an action or lack of action that contributed to the bad end-effect. The diagnosis is, in fact, based upon a behavioural analysis.

Stage 4: Assessing the strengths and weaknesses of the current working situation and determining the implications for the worker. Stating what is actually "going for" the worker alongside the difficulties in the situation helps to restore his/her morale and reveals firm ground on which to build.

Stage 5: Thinking out precisely what action the worker can now take. Being specific and explicit about the action to be taken is of the essence. Amongst other things this involves being specific about: the objective of the action (why? to what end?); about the situation, setting and context in which it is proposed to act (where? with whom?); about the manner and method of acting (how?); and about the timing (when?). Success can depend, for instance, on whether a worker writes a letter, telephones, calls unexpectedly or meets by appointment. Each of these is appropriate or inappropriate, depending upon people, situations and circumstances. Of course, the decision could be to take no action.

There is a propensity for people and workers to presume the outcome of the first round of action and to plan accordingly, instead of planning for the range of possible outcomes. This tends to reduce their freedom to work with people. Good designing and planning foresees the possibilities and prepares for them: it does not foreclose.

Ideas that work in one situation do not necessarily work in another. Similarly, what one person can do others cannot. So the solution must fit the worker and the situation. To aim for that is imperative.

This stage moves from the past to the future, from analysing to designing and from designing to planning. Choosing between the ideas for action involves analysing the pros and cons of each possibility in relation to purpose, beliefs, situations, circumstances and people. This kind of activity is discussed later.

Stage 6: Learning as much as possible from the experience in order to inform and improve the way in which the worker goes about things in the future. Drawing out conclusions or learning which would help workers to be more effective in future helps them to build up their own theory and code of good practice.

IV. USES OF THE METHOD

Case studies rarely fail to galvanize interest. People participate with an unusual degree of freedom; orderly discussion frequently gives way to excited interchanges as people struggle to articulate what they have perceived and grapple with conflicting views about what the worker did or should have done.

Frequently so many ideas and thoughts are produced in a short time that chaos reigns temporarily. The structured approach helps to give order and shape to the ideas and discussion. All this, and the intensive learning that accompanies it, seem to be related to the case being "real" and the tasks set being specific and concrete. Consequently it is inherently more difficult (but not impossible) for the discussion to become abstract (to "sky"). Everyone can contribute because they are drawing upon knowledge and experience in which they have a great emotional and intellectual investment, not least because it was gained in hard schools.

The potential in this method and its variations is great.

First, it focuses on workers and their perspective. As we have seen, it avoids and corrects discussions in which workers mentally move people around like pieces on a chess board. To be realistic we must focus on ourselves and what we can do to evoke the responses from others which engender creative action.

Second, it is a way of formulating experiences either in a verbal or written form which of itself:

- helps workers to objectify and order complex situations often highly charged with emotion and sometimes by feelings of guilt;
- can be therapeutic;
- is a way of getting real help from others because it makes the information available for them to work at the case.

Third, it can be used by individuals or groups. And as it draws upon knowledge and experience of human nature it can, suitably adapted, be used by people of any group or culture regardless of their formal education. Consequently it enables and encourages all to participate on equal terms; it promotes constructive co-operation rather than competition.

Fourth, it can be used formally or informally, as a mental exercise or a verbal or written process. Going through the stages rapidly when it simply is not possible to give more time to them puts some order into what would otherwise be frenzied thinking and gives at least a "first approximation" to the solution.

Fifth, it helps all concerned to "take hold of situations", to face up to them, to work through them and to decide quite specifically what they are going to do or not going to do. Thus it enhances their sense of being in control and "on top of things" and reduces the danger of their being panic-stricken.

Sixth, it is as applicable to "religious" case-study material as it is to that which is "practical". In fact such divisions are arbitrary because studying cases is as much a theological or ideological exercise as it is a pragmatic one.

Seventh, it is a way of analysing and profiling work situations.

Eighth, it is a way of self-training. Working on a number of cases, drawing out the learning points and classifying them helps us to profile our good and bad points as workers and to evolve our own codes of good practice. It also informs our intuitive responses and makes us more alive and alert to critical factors in our working relationships. Thus it helps us to be more effective in situations that call for spontaneous responses and action.

What I have written here draws heavily upon the vast amount of work that the Battens have done on case studies. They have written extensively about them.⁵ They have grouped cases under subject-matter such as "working with groups" and "working with leaders" and "dealing with faction". Having studied a cluster of cases they draw out the implications for workers. Workers who do this for themselves build up their own codes of good practice and the body of knowledge upon which it is based.

Someone with whom I worked felt that one of the most important things about studying cases was that it builds up a psychological profile of the worker. So the training can be related to work behaviour, the psychological and spiritual traits of the worker and the profile of the essential characteristics of the work situation: a vital triangle.

V. REFLECTIONS ON THE METHOD

One of the common responses to such an analysis is excitement about the learning from the exercise and amazement at all that there is to consider in such situations. It shows up the awesome business of working with people for human and spiritual development, the enormous potential, the frightening dangers and number of trip-wires. It opens out on many fields of understanding and knowledge about the human and the divine. It is the world of thought, theology and action in microcosm. It is packed with the kingdom. Consequently thinking about it is mind-boggling. How dare I do anything with people again?

Another common response is that people say that they simply cannot find the time to do such analysis on all the situations in which they are involved. The discussion described above took a group about two hours. So, adding the time to write the case, there is almost a day's work involved. My suspicion is that as much time had already been given to it to much less effect. (Coming to terms with the situation and facing up to doing anything constructive about it involves going over and around what happened almost in circles. It is not always possible to go straight into a systematic and penetrating analysis, we need "explanations" as to what happened with which we can live.⁶) However, the basic point is accepted. It simply is not possible to analyse all our work in this way. But it does not follow that we should therefore not examine any of our work in this way. If it is imperative that we do examine some of it for reasons that follow, and if we cannot examine all of it, then it is vital that we select carefully that which we do examine.

We need to examine it for several reasons: to tackle difficult problems to best effect with an economy of effort and emotional energy; to increase our understanding and knowledge; to develop our practice theory and to enhance our practice in general; to be able to assess and analyse situations more systematically, accurately and quickly. My colleague and I can use this method as we walk round the block to do a first approximation. It is not as carefully considered as the above analysis but it is better than an unstructured examination would be. We simply go through the steps and stages. Doing this builds up the facility to think in this way on our feet, as they say. So hours of practice has many benefits for work beyond the case, for situations yet to be encountered.

Clearly we owe a great debt to the Battens for developing this case-study method and for describing and illustrating it so thoroughly. However, there are two assumptions underlying their writings on case studies upon which I need to comment, although they may now have revised them.

First, the assumption that much more is learnt from things that go wrong than from things that go right i.e. from "failures" rather than "successes". Undoubtedly much can be learnt from "failures" and from this method of analysing. That I have proved from my own experience and that of others. Much can also be learnt from "successes", i.e. from what workers are doing well. Getting out the essentials of practice-theory from what people are doing well is vital for the development and transfer of skills. All too often the success is put down to the person having unique gifts. This feeds the pride of the person concerned, makes others feel inferior and does nothing for the development of the work. Getting out the basics enables many more people to practise. This is what happened in Avec in relation to situational analysis and work consultancy, described later. I was doing it intuitively. After a group had analysed with me what I was doing and why, my own practice improved and many others were able to do it as well.

The second assumption is that Batten says if the worker does everything right he will achieve his purposes. "If he (the worker) fails, he fails because of some misjudgement or mistake that he has made".⁷ Workers could do "everything right" and still fail to achieve their objectives. I say this because I experience sin and human perversity in myself and in others. In fact in some circumstances the worst is drawn out of us by those who do everything right! But beware that this is not used as an excuse. Amongst other things it means that studying cases is a theological exercise as well as a social/psychological one. It also means that remedial action involves spiritual matters; for example how we deal with our guilt, how we forgive and seek forgiveness. Also the development of ourselves as church and community development workers involves our growth as Christians. It is not only a matter of developing skills and insights.

NOTES AND REFERENCES

1. John Haley distinguished between open alliances for something, denied coalition against somebody. Cf. *The Hidden Games of Organization* by Mara Selvini Palazzoli (New York: Pantheon Books, 1986) chapter 8.
2. Cf. Batten, T.R., with the collaboration of Batten, M., *The Human Factor in Community Work* (London: OUP, 1965) pp. 126-149.
3. See pp. 193-196, below.
4. I have prepared some notes on the case-study method for those using it on courses. They are: "An Introduction To The Case-Study Methods", "Some Notes on Using the Case-Study Method in Church and Community Work" and "Discussing A Case in A Group". They are available from Avec, references Z1, 2 & 3.
5. Cf. Batten, *The Human Factor in Community Work*. These cases are set overseas but they are pertinent to work with people in any country. See also Batten *Training for Community Development: A Critical Study of Method* (London: OUP, 1962), pp. 39-40 and 113-120; Batten, *The Non-Directive Approach in Group and Community Work* (London: OUP, 1968), pp. 96-100. Batten, *The Human Factor in Youth Work* (London: OUP, 1979), is relevant to work with other age groups. In one way or another, these cases are highly relevant to the work of the ministry. Further, the classification of the cases and the conclusions the Battens draw are relevant to anyone working with people. Unfortunately the first three of these books are out of print but they can generally be obtained from libraries. Also see Avec Occasional Papers Z1, 2 & 3 referred to earlier.
6. David Smail in *Illusion & Reality: The Meaning of Anxiety* (London: J. M. Dent, 1984) says that "For everyday purposes, it seems that reality is the best description I am able to give myself of it" (p. 64).
7. Cf. *The Human Factor in Community Work*, p. 3.