

## ***Preferred Path Debrief Tool*<sup>1</sup> -- Summary**

### **What is this tool, and why might we want to use it?**

The *Preferred Path* Debrief (PPD) strengthens Christian communities by helping parties share information/views and thereby learn, change, and grow at critical points in church and family life.

### **What is the goal?**

Organizational and individual *learning and, if necessary, setting the stage for healing and peacemaking.*

### **When might we use it?**

After critical incidents, for example premature resignation of leader, or as a periodic event on calendar (e.g., annual reviews of staff and committees).

### **How long does it take to complete a debrief?**

Fifteen minutes to a couple of hours.

### **Who attends, where do they meet, and what happens?**

Attendees are those directly involved in the project or event, meeting in a setting conducive to speaking and listening, following steps that include planning, debriefing, and reporting.

### **Step 1: Plan**

Frame the topic, invite parties, arrange logistics, decide on use of facilitator: (a) No: parties relatively comfortable sharing thoughts and feelings with one another; (b) Yes: difficult topic, many parties.

### **Step 2: Guide the Discussion**

1. Open with prayer
2. Introduce topic and ground rules (input from all, individual perceptions welcome).
3. Address Five Questions [about the topic]
  - a. Ask, "What was expected to happen?"
  - b. Ask, "What actually occurred?"
  - c. Ask, "What went well and why?" (Successes)
  - d. Ask, "What did not go well?" (Concerns)
  - e. Ask, "What can we improve, and how?"

### **Step 3: Share Results**

Ask, "What action items might we deliver to those able to address them?"

Conclude with expression of appreciations and/or improvements in debrief process for use in future.

### **Close with Prayer and Adjourn.**

<sup>1</sup> For further information of the *Preferred Path* model for communicating, collaborating and resolving conflict in Christian communities, see [www.preferredpathconflictresolution.com](http://www.preferredpathconflictresolution.com). For information on evaluation or "after action review" methods in organizational learning, see [https://www.cebma.org/wp-content/uploads/Guide-to-theafter\\_action\\_review.pdf](https://www.cebma.org/wp-content/uploads/Guide-to-theafter_action_review.pdf).

## Details

### What is this tool, and why might I want to use it?

The *Preferred Path* Debrief (PPD) tool is modeled after templates used to help organizations capture lessons learned and make improvements to enhance organizational learning after critical incidents. The *Preferred Path* version helps parties in Christian communities to “debrief” (talk, discuss, review activities) and thereby learn, change, and grow at critical points in the evolution of church and family life.

### What is the goal?

Depending on the circumstances, the goal of a debrief might be:

- Organizational and individual *learning* (growth based on joint review of events), or
- Setting the stage for organizational and individual *healing* and *peacemaking* (reconciliation, restoration, or cooperative separation that might follow a debrief event).

The immediate objective in a *Preferred Path* debrief is for each person to have an opportunity to speak and be heard on the matter at hand (which strengthens bonds in church and family life), and for each person to have an opportunity to capture lessons that can be used to improve relationships now and in the future.

### When might we use it?

The PPD might be used at any of the following points:

- After singular critical incidents, for example:
  - After a project is completed (e.g., capital campaign, change in worship schedule);
  - Unexpected event in life of staff or church (e.g., premature resignation of pastor);
  - Post lawsuit or church split.
- As a routine event on the calendar for committees and staff:
  - Annual reviews for individual staff members; ○ Internal reviews for church committees;
  - As a part of ongoing operations for any task force or group delegated responsibility to complete a job.

### How long does it take to complete a debrief?

- A formal debrief using the outline suggested in this document might take a couple of hours; an informal debrief might take 15-30 minutes.

### Who attends, where do they meet, and what happens?

Attendees are those directly involved in the project or event. This might include:

- Members of a committee.

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- All members of a family.
- Church staff, pastors, other leaders.

The parties meet in a comfortable space that allows everyone to be seated, see and hear one another, and view (if applicable) flip charts for notes.

A typical debrief includes the following steps that can be followed by the parties themselves, or with a facilitator to guide.

### **Step 1: Plan**

The planning items listed below can be completed by any party (e.g., committee member, team member), and the results of these efforts shared for approval by others at the opening of Step 2.

1. Parties pray for one another as they consider scheduling a debrief.
2. Any party asks, "What event prompts this debrief?" (e.g., our pastor resigned prematurely, or we have annual review coming up, or we lost/gained many members last year).
3. "Who might be invited to the debrief?" (Consider those directly involved, decision makers, and constituents, erring on the side of inclusion rather than exclusion, the idea being that the more information and points of view, the better.)
4. "What physical arrangements do we need?"
  - a. Scheduled time on the calendar;
  - b. Place to talk where all can be seated, seen, and heard;
  - c. Supplies:
    - i. Flip chart and markers;
    - ii. Debrief template (this document).
    - iii. Refreshments.
5. "Do we want to use a facilitator?"
  - a. No: informal conversation, where parties believe they can share thoughts and feelings.
  - b. Yes: difficult topic, many parties.
6. "What roles can we assign?"
  - a. Note taker?
  - b. Timekeeper?
  - c. Facilitator?
7. "Who do I call first?"
  - a. Decision maker responsible for project or relationship (e.g., boss, team leader), and if decision is yes, then others listed under No. 3 above.
  - b. If facilitator is desired, contact *Preferred Path* Team leader for your church, denominational group (e.g., presbytery, diocese, and region).

Tips for Facilitators: Consider brief, confidential phone conversations with leader of group and key parties to hear concerns that each might be reluctant to express in the group meeting; use these confidential calls to educate and coach on how to make use of the process, leaving final decision about level of participation to each person.

## Step 2: Guide the Discussion

Note: if there is no facilitator, parties can use the following outline as a guide. If a facilitator is engaged, use the same outline, referring to tips for facilitators as needed.

1. **Open with prayer** (See *Preferred Path* guidance under Step 1 at [www.preferredpathconflictresolution.com](http://www.preferredpathconflictresolution.com)).
2. **Introduce the topic and ground rules**
  - a. State topic (e.g., what can we learn from a recent event, or one year of work together, etc.)
  - b. State goal of debrief: for participants to address five questions (below), giving all who wish an opportunity to speak.
  - c. Remind all that goal is learning based on experience.
  - d. State ground rules, which might include:
    - i. Active participation invited, though no pressure to speak if one wishes to remain silent.
    - ii. Take turns talking, aiming to understand message of speaker.
    - iii. Each person's view is important.
    - iv. No need to agree on perceptions.
    - v. Refrain from blame.
    - vi. "Yes, and" allows building and creating data base for reflection.
    - vii. No record of discussion distributed to anyone unless all agree.
    - viii. No quotes of individuals.
    - ix. Overall, the idea is to "Talk the problem, and write the solution".

Tips for Facilitators: In room arrangement, and in verbal and nonverbal guidance, aim for a welcoming and respectful discussion. Throughout, use open ended questions and model active listening as parties self-disclose.

3. **Address Five Questions [about the topic]**
  - a. **Ask, "What was expected to happen?"**
    - i. What was the original purpose and intent?
    - ii. Who was involved?
    - iii. What outcomes were intended?
  - b. **Ask, "What actually occurred?"**
    - i. Allow individual and idiosyncratic views.
    - ii. No need to agree.
    - iii. Events on the table.

Facilitator tips: Consider giving participants time to reflect and jot personal notes on answers to these questions, before the group begins discussion. Focus on events, and feelings about events, allowing different perceptions of the same events. Acknowledge these with your comments. Reframe general comments by asking, "What happened to lead you to conclude that, or feel that way, etc."

**c. Ask, “What went well and why?” (Successes)**

- i. State the good that happened.
- ii. Appreciations for specific events, and contributions.
- iii. Note if successes reflect strength in teams, community.
- iv. If time is short, ask for “what’s the best that happened”?

Facilitator tip: For individuals who are deeply concerned about problems (next question), this question may present a struggle. Note that all will not agree on what was good, and what was not so good.

**d. Ask, “What did not go well?” (Concerns)**

- i. As with successes, invite behavioral language.
- ii. Invite possible explanations for the problems.

Facilitator Tips: Use active listening to put negatives in context of the whole, as in “I’m hearing concerns that go alongside the good parts.” As with successes, summarize what has been said thus far.

**e. Ask, “How can we improve, and how?”**

- i. Brainstorm steps to keep the good going, and correct for the not so good.
- ii. Consider referrals for interpersonal peacemaking, mediation, training, further evaluation on topics identified in the debrief.
- iii. Who will do what? When?
- iv. Invite statements of the logic behind the suggestion (e.g., I think if we had clearer job expectations, a lot of this [pain] would have been avoided).
- v. Consider action items for individuals, teams, and task forces.
- vi. Remember the aim to “Talk the problem [done here] and write the solution [going forward].”

Facilitator Tips: Use your knowledge of other *Preferred Path* tools such as Conflict Grid categories, One Text Integrative Solutions, and the Standard Solution for conflict resolution (<http://www.preferredpathministry.com/preferred-path-toolkit/>) as a guide for listening, reframing and inviting clarification.

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### **Step 3: Share Results**

The main benefit of the debrief may already be felt at this point: people having the opportunity to speak, and be heard. A second benefit is action by those able to build on strengths and make corrective action. Accordingly,

- a. Ask, "What action items might we deliver to those able to address them?"
- b. For example, in a personnel annual review, which items apply to my boss and which to me? For a church, which items go to the pastor, which to committees, etc.?
- c. Note taker reads and group discusses and negotiates agreement on "what is transferred to whom".

Facilitator tips: Informally mediate any disagreement about reporting. As fallback, offer your assistance in delivering materials.

Conclude by going around the room to give participants an opportunity to express appreciations and/or concerns about the process. If parties desire, offer a follow-up meeting to assess progress.

**Close with Prayer and Adjourn.**