

THE Q-BIT

AT THE HEART OF A QUAKER-LED ORGANISATION



QSA

Quaker Social Action

AN INQUIRY INTO OUR QUAKER IDENTITY BY
THE TRUSTEES OF QUAKER SOCIAL ACTION

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SUMMARY

THE Q-BIT: AT THE HEART OF A QUAKER-LED ORGANISATION

During 2010/2011 the trustees of Quaker Social Action (QSA) were prompted to explore how we perceive and express the Quaker dimension of QSA's identity today. With the support of a grant from Joseph Rowntree Charitable Trust we were able to explore this in depth.

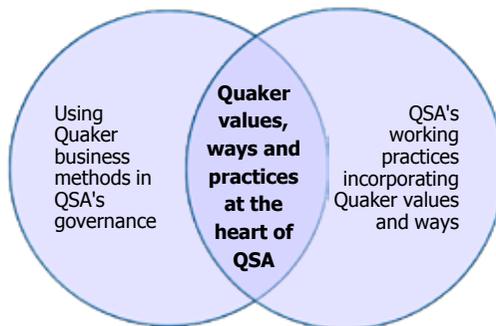
This report is the story of our journey in exploring our principal questions:

- How are our Quaker values and identity expressed through our organisation and in its work?
- Could we articulate that more usefully and clearly?
- How can we explore best practice in the use of Quaker business methods in the governance of an incorporated charity?
- Do Quaker governance and our Quaker identity strengthen QSA's work in challenging poverty?

Working with a facilitator, we spent fifteen months exploring these questions. In some sessions we worked as a trustee group, we had a productive session with staff, and twice invited a wide range of Quakers and Quaker-led organisations to collaborate with us.

From our inquiry we learned that:

- The **vitality, strategic focus and impact of QSA are rooted in a marriage of formative Quaker values, ways and practices with QSA's professional experience and practice** established through its work in London's East End



- This constellation of **Quaker values, ways of working and practices** in combination creates a **culture** distinctive to QSA. This is our **Quaker identity** and we see it as **the heart of QSA**, upholding all that is best in the organisation
- We see it demonstrated in the way staff perceive and carry out their work and in their relationships with each other and service users and

in trustees' commitment to **spirit-led** Quaker business methods in our governance

- **Leadership** at QSA is enabling and facilitative and used creatively by trustees, clerk, director, managers and staff
- Finally we reflect on some **challenges and opportunities of the Q-bit in dialogues with Quaker and non-Quaker organisations**

The 'inner-side' of trusteeship

Essentially, this inquiry is an exploration of the inner-side of trusteeship. The inner-side of trusteeship gives life and vitality to the cherished values and purposes of an enterprise and the unfolding of its creative founding spirit – what Otto Scharmer describes as “the deeper source, the inner place from which an individual or a system operates.” It is subtle to discern and elusive to articulate, but arguably needs to be explored and renewed once in every generation if an organisation is to be vibrant and robust in fulfilling its purpose whilst resilient and flexible in meeting change. This has added power when the inner-side of trusteeship is rooted in the lived experience of a spiritual and religious community, bears fruit in its values, ways and practices and is expressed in its governance, ways of working and the impact of its work in the world.

This trusteeship, as Quakers experience it, is fundamentally founded on *trust*:

- *trust* in the discoveries of the spiritual practices of early Quakers
- *trust* in the process and discipline of Quaker business methods
- *trust* in the differing perceptions and experience of Spirit within a group of Quakers
- *trust* that – if we listen deeply to the promptings of love and truth – the decisions we make are spirit-led
- *trust* that we can learn how to discern and test their validity
- and *trusting* what Quakers call “that of God” in each and every person

**“The Q-bit” reports what we understand this means
in the life of Quaker Social Action today**

We noted Quaker-inspired ways of being and relating that we encounter at work in QSA. We feel they are intrinsic to QSA, at the heart of who we are and how we do things.

Staff and trustees compiled this list based on our shared lived experience:

- **Silence and quiet** for reflection on our work, especially in a group
- Seeing the very **best in everyone**
- **Respect** for each person and **equality**
- Speaking **plainly**
- **Hearing all** views and voices
- Welcoming **diversity**
- A determined **search for unity**
- Accepting that **we might be wrong**
- Always **acting according to conscience** and willingness to do the hard or unpopular thing when we have discerned it to be the way forward
- **Mindful reflection** or discernment in order to work out what is the right thing to do
- **Challenging** ideas with care - testing ideas or concerns
- Waiting for **clearness** before we act

THE Q-BIT

PART 1: WHO, WHAT, WHY, AND HOW

What is Quaker Social Action?

Quaker Social Action is a medium-sized charity that addresses poverty and social exclusion in East London. It was founded in 1867 as the Bedford Institute Association, in memory of Quaker philanthropist Peter Bedford, from three Quaker organisations that aimed to provide “education, religious effort, moral training and relief of the sick and destitute”. Over the next hundred plus years, it continued its work, through many social changes and the advent of a welfare society that profoundly altered the context of charitable activity. By the late nineteenth nineties, the Association was again in a period of rapid growth in response to increasing and enduring social deprivation and poverty and at this time it re-formed as Quaker Social Action, a charity and limited company.^[1]

QSA’s work today is focused through a variety of projects relating to the everyday needs of the people with whom we work with the intention of making a tangible difference to their lives. At QSA we see this as a shared enterprise: the people we work with are agents of change and enabling their resilience and potential is central to what QSA does. We aim to “resource, enable and equip people living on a low income in East London” to find practical and creative solutions to the problems which affect people living on a low income.^[2] In the course of this, QSA has earned respect in the local community and received numerous charity awards and commendations. The point is not that you should know QSA receives such commendations but it indicates that something works very well in the mix that makes QSA what it is.

The Q-bit – is QSA Quaker in more than its name?

QSA as a whole has a very strong and positive identity; its Quaker dimension is one – albeit core – element in that.

QSA has been Quaker-led since it was founded. Historically, our visible Quaker identity has been upheld in three ways: in requiring trustees to be members or attenders^[3] of the Religious Society of Friends^[4] – Quakers; in conducting QSA

¹ For history of QSA see www.quakersocialaction.com/history (Accessed March 2013)

² www.quakersocialaction.com/About-QSA/about-us (Accessed Jan 2013)

³ Attender – “An attender is one who, not being a member, frequently attends a specific meeting for worship.” Quaker faith & practice: the book of Christian discipline of the Yearly Meeting of the Religious Society of Friends (Quakers) in Britain (London: The Yearly Meeting of the Religious Society of Friends (Quakers) in Britain, 1995) Paragraph 11:39

trustee meetings according to Quaker business methods; and by name as Quaker Social Action.

Yet, QSA's work is grounded in a secular world. It delivers services primarily to the residents of Hackney, Newham and Tower Hamlets – some of the poorest and most diverse London boroughs. 90% of QSA's funding comes from civil society foundations, grant-making trusts and public bodies. Although only 10% of our funding comes from Quaker sources, it is critical as it comprises a significant proportion of our unrestricted funds; unrestricted funds enable QSA to develop work that follows our principles and heart rather than being driven by what is fundable. Generally all but one or two of our staff and volunteers are non-Quaker (and few Quakers apply for our posts).

By late 2010 we, QSA trustees, were realising we had unexplored questions about the part our Quaker identity plays in our work today. We had a strong sense of individual commitment to QSA being *Quaker Social Action*; it was the Quaker connection that drew us to become trustees. There was also a sense, which we found difficult to define, that its Quaker influence – beyond simply being Quaker-founded in 1867 – makes QSA different in character to what it would be without its Quaker affiliations. We needed to explore and test our assumption that there are recognisably Quaker values, ways and practices at the heart of QSA that inspire and shape the character of the organisation and its practical work.

Moreover, QSA's Quaker identity is not an end in itself. We were concerned to examine for ourselves what Roger Wilson, in 1949, articulated as: "...the relation between the inspiration of 'concern' and sound sense when a Quaker organisation starting from a 'concern' is embarked on an enterprise where decisions have to be taken before inspiration is forthcoming...."^[5] Does QSA's Quaker identity contribute to QSA's effectiveness in addressing poverty and social exclusion and its impact in challenging society's tacit toleration of deep and structural inequalities in British society?

Who are the Quakers?

Quakers, also known as Friends, are one of the numerically smaller religious communities in Britain^[6], noted amongst the public at large for passionate and

⁴ 'Friends' is the term by which Quakers are familiarly known. I generally use 'Quakers' except where 'Friends' is used in a direct quote or for readability where 'Quaker' would be repeated in a sentence

⁵ Wilson, Roger (1949) *Authority, Leadership and Concern*, Swarthmore Lecture, Quaker Books, London

⁶ At the end of 2011, members numbered 14,080 and adult attenders 8,711, *from* Tabular Statement at 31.xi.2012 of Britain Yearly Meeting of the Religious Society of Friends

active commitment to peace and social action, and known by some to practise a markedly different way of managing their business. These Quaker business methods are, in contemporary parlance, based on characteristics like deep listening, shared non-hierarchical leadership, trust and inclusivity. However, there are two particularly distinctive aspects of Quaker practice. Firstly, a core commitment to be spirit-led, what early Quakers called leadings or the will of God; thus in business meetings Quakers don't vote but make decisions based on discerning this central and determining direction. The second distinctive – and unique – practice is that these decisions are recorded by contemporaneous writing of minutes, drafted in the meeting by the clerk and representing the discernment⁷ of all present. The minutes are a collective expression of the understanding the meeting has reached of its leading and steps it has identified to put it into practice; this is recorded as the decision.

Quaker business methods evolved from the foundations of Quaker spirituality. From the very beginnings, the central authority in the embryonic Quaker way was a collective or corporate experience: early Quakers experienced and understood God as accessible to each person – 'listening' to the still small voice and 'hearing'¹⁸ leadings or promptings that gave insight into how to live and how to act. Early Quakers developed ways of listening to such leadings and promptings when they were gathered together – corporate guidance – testing them and discerning, so far as they could, whether they were valid – Truth. This is as important and central to Quakers today as it was in the late seventeenth century, even if the language in which it is expressed is more varied and nuanced to reflect more diverse understandings of God.

The changing world of charities

In recent years the business and governance of charities has changed significantly. This has been particularly marked when, like QSA, their business is delivering services to the public and their governance is structured as a limited company. Over the last six or seven years, since the changes brought about by the Charities Act of 2006, the role of trustees has demanded more skill and closer attention to good governance: trustees are expected to be active in improving the effectiveness of their performance as trustees; the conduct of their work must manage an increasing volume of business; they must be competent to engage with complex issues encompassing legal and financial legislation; funders require more stringent reporting on delivery of targets and impact as they, in turn, become

⁷ Discernment is central to Quaker practice, a process of waiting and deep listening that filters out distractions and 'noise' to reach clarity guided by the promptings of Love and Truth

⁸ 'Listening' and 'hearing' do not mean that the only, or necessarily main, way in which people come to understand their inner sense is through auditory perception, but that such words are frequently used to describe the process.

more diligent in evaluating the outcomes of activity they have funded; charities need to be responsive to the impact of a fluid economic climate on the nature and level of need charities address.

Being a QSA trustee and the role of clerking

When I was appointed as a trustee of QSA in 2009, I was appointed to become chair of trustees when my predecessor stood down, which took effect in January 2010. The chair and trustees of QSA hold corporate responsibility for the governance of a complex and dynamic charity. But my role is not simply chair of trustees; I am also clerk to trustees whose form of governance is based on Quaker values and the Quaker way of decision-making. There are particular demands in using this decision-making method when an organisation is responsible for delivering vital services for people in challenging life-situations, using considerable amounts of publicly raised money, answerable to statutory requirements and external timetables and scrutiny. This challenge is familiar to Friends in Quaker-led organisations where the operation of a business may need to give priority to external requirements rather than reaching unity. Jennifer Barraclough, formerly director of Woodbrooke Quaker Study Centre, particularly noted Wilson's distinction between *moral* and *administrative* responsibility and the need for a wise and judicious balance between governance – purpose, direction and strategic priorities – and business – which we might see as its work in action and delivery of services.^[9]

Clerking is also part of Quakers' very different model of leadership. It may include conventional executive decision and action, but from the point of view of serving and upholding the insight and discernment of the group. It is a key role in supporting the work of a group seeking to be ever mindful of the foundational aim of Quaker business methods – being spirit-led.

By 2011, QSA's Council, comprising trustees and the director, was in the midst of a period of change. New trustees replaced long-serving trustees whose service was ending. In handing over to us, the retiring trustees brought a number of knotty questions to our attention. The socio-economic profile of a Quaker trustee group is generally less diverse than the general population and a funder had questioned whether this restricted the range of views brought to our decision-making. QSA was engaged in an 18-month review of our strategic plan with PilotLight – who provide bespoke mentoring from private sector executives – that brought a fresh focus to a critical review of our work and future. A retiring trustee, reflecting on such questions, wondered whether ownership of QSA should cease to be Quaker-

⁹ From a review by Jennifer Barraclough of the 1949 Swarthmore Lecture by Roger Wilson, *Authority, Leadership and Concern* www.nayler.org/?p=689 (Accessed March 2013)

led and become community-led. A number of times during 2010 and 2011 QSA trustees wrestled with our ongoing dilemma of reconciling Quakers' corporate opposition to lottery funding with QSA's need to secure funding to continue our work and serve beneficiaries who would not themselves be opposed to such applications.

QSA's inquiry into the meaning of its Quaker identity today

We wanted to explore the Quaker aspect of QSA's identity, wondering what might characterise Quaker-led and Quaker-inspired organisations today. Are our Quaker values and ways expressed clearly other than through Quaker methods of governance? With the support of a grant from Joseph Rowntree Charitable Trust (JRCT)^[10], QSA trustees and our director, Judith Moran^[11], spent the next fifteen months in an intensive appreciative inquiry^[12]. We explored in depth the marriage between Quaker values, ways and practices applied in an outward-facing, delivery-oriented charitable business that depends for its survival – let alone its success – on generating trust, respect and a reputation for effective performance in a secular world of funders, charities and providers. This report includes the story of our journey, those who explored it with us, our conclusions and some further conversations to which it may give rise.



The inquiry has been a collaborative effort. The main group of seven QSA trustees participated in every inquiry session; we were joined at the first inquiry session by three of the five trustees then stepping down from service and at our final and fifth session by four of five new trustees in the process of joining us. At our second session, we welcomed thirty-four guests – largely Quakers

and a few employees of Quaker organisations – who between them brought knowledge and experience of some thirty Quaker-led organisations. In our third session, we benefitted from the wisdom and experience of a group of fourteen Quakers who joined QSA trustees in a full-day intensive case study of Quaker business methods at work. We had a joyful and productive fourth session working

¹⁰ Joseph Rowntree Charitable Trust: a Quaker trust which seeks to transform the world by supporting people who address the root causes of conflict and injustice (www.jrct.org.uk)

¹¹ This was termed a Trustees inquiry. But Judith Moran, our director, played a full part throughout the inquiry. Wherever I use the word 'trustees', it denotes the trustees and director, except where the text makes it clear the group is trustees only

¹² Appreciative inquiry is a collaborative and reflective process, based on principles of action learning. It maintains that in order to know how to journey wisely to the future we need to understand and value the very best of our past experience

with QSA staff. Throughout we were ably served by the skill and commitment of our facilitator, Cliodhna Mulhern.

This report^[13]

The main work of writing this report has been done by one person thus it is all subject to the filter of my perceptions. It has been read by critical readers, each draft has been read by QSA trustees and we held a trustee collaborative review. Having been involved in every aspect of the inquiry process and associated conversations I came to see this as a more extensive enterprise than simply report-writing. Sometimes I step beyond what took place to reflect more broadly on the subject; this has been shared and considered by us all as trustees but I take responsibility for this in particular.

Signposting you

The rest of this report is divided into Parts, each of which looks at the inquiry and our findings in different ways. This may result in some material appearing in more than one place but this is avoided as far as possible. Readers who are not Quakers may reflect on the findings of our inquiry by reference to business methods familiar to them, particularly models that are spirit-led.

Part 1 sets the context of **who, why, what and how** of QSA trustees' inquiry.

Part 2 provides a broad sweep of our journey through the inquiry, highlights principal **milestones and headlines** and our broad conclusions.

Part 3 explores **the heart of our Quaker identity**, how this generates a culture that infuses our ways of working, management and leadership, and reflects on spirit-led Quaker ways.

Part 4 draws upon two inquiry sessions with other Quakers that **explored our Quaker identity and trustees' use of Quaker business methods**.

Part 5 collates and reviews our learning on **Quaker values, ways and practices in QSA, how QSA trustees and staff see this at work** in the organisation, and

Part 6 – 'Afterwords': A Think-Piece reflects further on four central threads we identified during our inquiry – being spirit-led, leadership, good process and culture. Its intention is to stimulate reflection on some challenges and opportunities of dialogue with Quaker and non-Quaker organisations. It is presented simply as speculative reflection, intended only to suggest ways forward or conversations to be developed.

¹³ Reports from all stages of the inquiry can be downloaded from the QSA website: www.quakersocialaction.com/about-qa/quaker-identity

The material gathered during our inquiry, our reflections on it and the discussion in this report relate to what we discovered during our inquiry and the sense we are making of it now. Our work in implementing the changes that flow from our inquiry conclusions and the reflections thrown up by writing this report highlight the rich veins of the inquiry.

In the course of this we touched on many issues that require more detailed review. But that is not the purpose of this report. Our present purpose is to present for a wider audience what led QSA to its inquiry, what we did, what we found and our broad conclusions. Our remit is to present and discuss broader questions of values, governance or leadership insofar as they arose during and from our inquiry, and to use the 'think-piece' to begin noting questions that may spark further discussion for Quakers and others about innerly-led and collaborative models of governance and business.

How words are used

Usually Quakers talk about 'Quaker Business Method'. Here I more often use 'Quaker business methods' to indicate a commonly used discipline and shape to a process which may be practised with some flexibility without straying from the key principle that decision-making is spirit-led.

It has also been my choice to use a variety of terms and expressions for Quakers' spirit-led decision-making. I have done this to make evident there is no single form of words that describes varying Quaker experiences and understanding of 'the will' or 'leadings of God'.

Frequently throughout the inquiry, QSA trustees and our facilitator talked about 'values', 'ways' and 'practices' without defining exactly what we meant by each. We were content that, in our perception, taken together they added up to the Quaker identity we were exploring – which we called 'the Q-bit'. However, in preparing this report, I have re-examined how we used these words and offer an explanation of our implied use of them.

'Values' we used to mean Quakers' experience that Spirit is expressed through principles "that we hold dear in our hearts and which matter most to us"^[14], principles for behaviour, living and action. 'Ways' are customs and skills – ways of doing things, and some different models that translate our principles into behaviours. 'Practices' are more like the mechanics, particular processes or routines, that we hope enables this Spirit to flow, in our values and ways, into discernment and decisions.

¹⁴ Marks, Linda (1989) *Living with Vision*, Knowledge Systems Inc., Indianapolis, USA

'We', 'us' and 'they' identifies my own participation in various groups in this report, usually referring to QSA as a whole and QSA trustees in particular, but sometimes to another group of which I am part, such as the broader Quaker community. Occasionally I simply use 'we' and 'us' collectively for the group I am discussing as anything else doesn't make sense. Where I use 'I' this indicates passages which are my authorship rather than writing on behalf of QSA trustees.

God language

Sometimes I use the word God. Some readers may find this challenging or feel it is not part of their understanding. Would any two people give the same explanation of what God means to them? In the seventeenth century, early Quakers had a more traditional concept of God than commonly held today. Yet their experience of what they meant by God was radical and is foundational to Quaker business methods today. We may use different words and frameworks to interpret our experience but the essence is still an experientially-inspired perception that individually and collectively we can be guided by something larger than ourselves, the group or the enterprise. Some people express this as 'what love requires of us'. Seeking to align and attune ourselves to a transcendent 'something more' leads us into ways of conducting our lives and business that are qualitatively different – hence spirit-led. Quaker business methods are the particular ways that Quakers have established and tested over three hundred years to ground and give practical expression to their inward experience of being spirit-led and make it useable in the management of their business.

And these are simply words - as if there would ever be a definitive way to use words to describe the mystery of this dimension of human experience.

"Words must not become barriers between us, for no one of us can ever adequately understand or express the truth about God. Yet words are our tools and we must not be afraid to express the truth we know in the best words we can."^[15]

Joycelin Dawes,
Clerk and chair of trustees,
Quaker Social Action, April 2013

¹⁵ *Qf&p* The Introduction

PART 2: MILESTONES AND HEADLINES

The ‘inner-side’ of trusteeship

Essentially, this inquiry is an exploration of the inner-side of trusteeship. The inner-side of trusteeship gives life and vitality to the cherished values and purposes of an enterprise and the unfolding of its creative founding spirit – what Otto Scharmer describes as “the deeper source, the inner place from which an individual or a system operates.”^[1] It is subtle to discern and elusive to articulate, but arguably needs to be explored and renewed once in every generation if an organisation is to be vibrant and robust in fulfilling its purpose whilst resilient and flexible in meeting change. This has added power when the inner-side of trusteeship is rooted in the lived experience of a spiritual and religious community, bears fruit in its values, ways and practices and is expressed in its governance, ways of working and the impact of its work in the world.

This trusteeship, as Quakers experience it, is fundamentally founded on *trust*:

- *trust* in the discoveries of the spiritual practices of early Quakers
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- *trust* that we can learn how to discern and test their validity
- and *trusting* what Quakers call “that of God” in each and every person

“The Q-bit” is our report of an inquiry into what we understand this means in the life of Quaker Social Action today.

Our starting point

As 2010 passed into 2011, QSA trustees thought deeply about the task we had set ourselves in exploring the meaning of our Quaker identity to the organisation and its role in supporting QSA to be effective and robust.

Our intentions were summed up in our grant request to Joseph Rowntree Charitable Trust, with whom QSA has had a fruitful relationship for some years. Extracts from our submission to JRCT describe how we saw our task: “We see this piece of work as a reflection on how exactly QSA brings Quaker values to the wider community and what this means in practice. What is essentially Quakerly about our work and could we articulate that better? We want to achieve a clear statement about how Quaker values, identity and witness are expressed through QSA,

Designing your own inquiry

- Reflecting on your purpose
- Considering resources
- Articulate questions you want to answer

¹ Scharmer, Otto (2002) *Presencing: Illuminating The Blind Spot of Leadership*, Aug 2002, available at www.ottoscharmer.com/docs/other/PresencingIntro.pdf Accessed March 2013. See also Scharmer, Otto (2007) *Theory U: Leading from the Future as it Emerges* Berrett-Koehler, San Francisco

- Is your work for internal use or to share with others?

to explore best practice in using the Quaker Business Method in the context of an incorporated charity. We want to publish our experience of our journey and findings and share this as widely and helpfully as possible with other Quaker organisations.”

Early questions and the first inquiry session

Our JRCT grant was invaluable as we were able to engage a facilitator to guide our inquiry and invite a wider range of Quakers as participants in different stages of our inquiry thus enabling a more thorough exploration of the questions.

We invited Clodhna Mulhern to facilitate our inquiry and she proposed that we use appreciative inquiry as our method of exploring our questions. This most clearly marked our first session as we reflected on what inspired our own commitment to QSA, and then reflected on factors common to social action organisations we knew. We were reminded that values treasured by Quakers are not unique to us but widely shared with other remarkable social action organisations we knew. Nevertheless, this activity reinforced our view ***something gives Quaker groups or organisations a distinct and recognisable identity; we coined the phrase ‘the Q-bit’ to denote this.*** The next stage of our inquiry took shape as we began to explore what constituted the Q-bit and saw we needed to widen our pool of experience.

We made a breakthrough as ***we let go of any idea that the values Quakers hold dear are unique*** – we dropped our perception of being special that can otherwise so hinder the process of uncovering something of more value.

The second inquiry session, collaboration and widening the pool of experience

In preparing the second session we saw that whilst our overall aims remained the same, as we progressed and drew other people to work with us, the specific questions evolved to reflect the focus session by session. We called the second session of our inquiry *‘Holding it up to the Light; exploring what it means to be a Quaker organisation now’*. We invited Quaker-led organisations whose work is outward-facing (as distinct from those that primarily serve the Quaker community in Britain) to gather with us at Woodbrooke Quaker Study Centre. Together we set about exploring QSA trustees’ questions with a slightly changed emphasis:

- Decide whether to use a facilitator
- Decide on inquiry methodology
- First stage: refine questions, explore perceptions of main participants
- Keep balance between underlying aims and focus for session as work unfolds and participants vary
- Diversify the experience available to you

- What is essentially Quakerly about how we work as organisations?
- What practical difference does it make?
- How is this difference evident in our work and practice?

From this inquiry session at Woodbrooke we confirmed some of the key skills, processes and disciplines for effective practice of Quaker business methods: building and maintaining **trust**; **leadership**; the role and function of **clerking**; clear and mindful **processes** framed by a **discipline** required of the group; careful holding of a bigger picture that comes through **discernment**; and shared **values**.

It was clear amongst those at Woodbrooke that, irrespective of the different focus of each organisation, **our values and use of Quaker business methods are of paramount importance to the Quakers involved and a key part of what makes us who we are**. We also felt that Quaker business methods sometimes needed to be conducted with more skill and awareness.

At the end of this second stage we, QSA trustees, had expected to make a decision about whether our inquiry would go deeper, or go wider and engage in similar conversations with Quaker groups engaged in social witness about Quaker values and practice at work in our organisations. Our way forward was deeper.



A pivotal point in the inquiry

Given our expressed interest “to explore best practice in using the Quaker Business Method in the context of an incorporated charity”, QSA

trustees rapidly determined that the next stage in our inquiry was to **inquire more deeply into the nuts and bolts of the workings of Quaker business methods**. We wanted to ask: what is happening in any moment that supports skilful and effective use of Quaker business methods? Although it was not yet fully evident, **QSA trustees implicitly recognised that use of Quaker business methods in our governance is a principal element in QSA’s Quaker identity**.

- After each session summarise material gathered and reflect on learning – harvesting
- Within an inquiry, using a variety of methods and size of group according to what is most fruitful for the main activity
- Noting key points as they unfold, building on them, deepening learning and insight
- Notice important milestones in inquiry process

- Record moments which shift inquiry into a new place

- Case stories yield much concrete information and insight, make good use of skill and experience of participants from practical situations

- Moments that draw people together around a new, shared insight energise the inquiry process

- Recognise new areas of focus as they arise and bring them forward for everyone's reflection

To go deeper, we wanted our inquiry questions to enable a small group of experienced participants to delve deeply into the grace and grit of using Quaker business methods in settings they knew. This time our underlying questions focused on:

- How to make sure our Quaker business methods serve us well in our most challenging moments
- How to improve our application of Quaker business methods and raise awareness of the importance of good process in our organisations
- How to deal tenderly with painful and disruptive processes, and
- How Quaker business methods in turn influence organisational practices and norms throughout the organisation

Much of the detailed work of this third session was done in small groups, each one unpacking a case-story brought by one of its participants. During the course of the day we gathered and collated a mass of evidence-backed understanding and insight.

By the end of this session, QSA trustees, helped immeasurably by the wisdom and insight of the gathered Quakers, had identified **key skills, processes and disciplines for more graceful and skilful use of Quaker business methods** that confirmed and amplified our work at Woodbrooke. We also engaged with two new, profound and challenging questions: ***Quakers describe Quaker business methods as spirit-led, but do we know if we have made the best decision we could? Can we know if it was spirit-led?*** We were unable in the time available to do more than begin to sketch our concerns and thoughts and they remain open questions.

This was a **key stage in our inquiry**. Whilst our inquiry sessions still left many avenues of exploration untouched, we decided we needed to distil what we had found, reach conclusions and discern what we were going to do with what we had discovered.

The fourth inquiry session – collaborative exploration with staff

We had gone as far as we could simply as QSA trustees and with Quakers. What we needed now was the broader perspective that a collaborative exploration with QSA staff would bring. This became the focus of our next, and fourth, inquiry session.

Again we began our session sharing our own lived experience of good work and practice in QSA. Around this point, we also began seeing something that became a corner-stone of our inquiry conclusions. ***Staff and trustees together perceived that whilst the values and principles at the heart of QSA are not unique to Quakers, in combination they generate a distinct character in our organisation which is in keeping with, and deeply upheld by, our Quaker past and enduring trusteeship – our organisational culture.***

This growing realisation that few of our Quaker values and ways are, in themselves, unique (though some are) led us to see there is a ***constellation of values, practices and ways of relating that is so central, and so intrinsic to who we are that we began to perceive them as akin to QSA’s DNA.*** We drew the analogy with DNA because in a cell DNA encodes and passes on what the next generation needs to know to replicate the living organism as a recognisable and identifiable whole. ***This metaphor was itself a key insight as it helped everyone understand QSA as a living organism.*** We validated this insight by compiling ***a list of the Quaker-inspired ways we observe at work in QSA*** and grounded this with examples of how it is put into practice – what it looks like when it is happening. We found this a very unifying activity. It revealed the extent of the ***shared understanding, values, and ways of working*** that trustees employ in governance, that staff embed in their practice and that characterises staff relationships with each other and service users.

Alongside this we became ever more aware of ***the importance of leadership and its many facets in QSA’s structure.*** The partnership between director and clerk connects the operational work of the organisation with governance, enabling a synergy between administrative

- Begin from what is known and establish what is shared as new group meets

- Making the connection between a new insight and the original purpose of the inquiry moves the whole process powerfully forward

- Articulating key insights can be transformative

- Realise broad drift of what is emerging

- Keep the overall progress and end point of the inquiry in view
- An inquiry with many sessions over a period of time is demanding for participants but enables depth, so insight and learning emerge organically
- Whilst the inquiry may conclude, it's important to realise that the work is not over. Bringing the inquiry itself to a completion is followed by formal approval of conclusions and drawing up strategies for implementing them

and spirit-led leadership. In terms of QSA's Quaker identity, they form a channel through which the Q-bit is nurtured and transmitted: the clerk's leadership enables the role of trustees in upholding Quaker business methods and overall direction of the organisation; the director helps staff understand our Quaker heritage and values, setting the tone for delivery of our work that has Quaker ways at the heart of working practices and relationships amongst staff, volunteers and service users. We observe this is a Quaker (clerk)/non-Quaker (current director) model that serves us well. ***This realisation was another milestone in our inquiry, beginning to answer the question about what practical difference QSA's Quaker identity makes, and how this difference is evident in our work and practice.***

The fifth, and concluding, inquiry session

Following this session with staff, trustees met for a final time in inquiry mode to complete our work. This time the 'regulars' were joined by four of the five new trustees being appointed during 2012, so we reviewed our journey and reflected on our conclusions together. By now, the main outcomes from our inquiry were becoming clear. Trustees meeting in Council thereafter took responsibility for ***discerning decisions flowing from our conclusions and overseeing a plan of implementation.*** There is much more material, however, that could be distilled, recorded and shared for its value for Quakers and, we hope, its value to non-Quakers too. QSA trustees may later be able to share a manual we hope to compile of our use of Quaker business methods for the use of future QSA trustees.

What has emerged from our inquiry?

As the inquiry unfolded, we gradually built a picture of the meaning of QSA's Quaker identity today. ***At its heart are Quaker values, ways and practices that infuse governance by trustees and working practices of staff; there is a synergy by which this generates and infuses the culture of QSA.***

We started our inquiry with some particular areas of exploration. At the end QSA trustees re-visited these to review our way forward:

- What does QSA’s Quaker identity mean today?
- Should QSA continue to identify itself as a Quaker charity or consider a future as a community-based charity?
- What is our understanding of “best practice in using Quaker business methods in the context of an incorporated charity”?
- How are Quaker values, identity and witness expressed through QSA?
- In what ways might our Quaker identity strengthen QSA in its work?

Our conclusions

We have gained greater clarity about the role and meaning of QSA’s Quaker identity today, its place in the whole, how we can improve our practice of Quaker business methods in our governance and the Quaker values, identity and witness expressed through QSA:

1. The ***vitality, strategic focus and impact of QSA are rooted in a marriage of formative Quaker values, ways and practices with QSA’s professional experience and practice*** established through its work in London’s East End.
2. This is our Quaker identity and we see it as ***the heart of QSA***, upholding all that is best in the organisation. This constellation of values, norms, ways of working and practices in combination creates a culture distinctive to QSA, a culture of values and Quaker business methods alive in the organisation.
3. These insights helped us understand the part played by QSA’s Quaker identity. This shaped our response to our question of whether we should continue as a Quaker or a community-based charity; ***we are not led to release our Quaker identity and heritage***.
4. The presence of Quakers as trustees is needed for the continued upholding of QSA’s Quaker identity. Alongside their overall functions of governance, ***trustees have a particular responsibility to demonstrate ways and practices that keep the Quaker dimension alive in the organisation, and give clear leadership in embedding Quaker values at the strategic heart of the organisation***.
5. During the inquiry we also learned from colleagues in other Quaker-based organisations of how they work with a mix of Quaker and non-Quaker trustees. ***We came to see Quaker values and business methods can be upheld by a mixed group of Quaker and non-Quaker trustees***. We conclude this requires a majority of trustees, including the clerk, to be Quakers and for non-Quaker trustees to receive good induction in Quaker values and business methods. This key conclusion, reached in our final reflection on trustees’ last inquiry day, has since been confirmed by a formal minute in Council and embedded in our revised Articles of Association.
6. Leadership is critical to the culture of an organisation. ***In QSA leadership is manifest in many ways and at many levels***. Amongst

us as colleagues, we find it to be a creative, shared and distributed leadership. Trustees deepened and affirmed our understanding of leadership in ***governance that is spirit-led***, led by our discernment of the movement and direction of spirit and, in preparing for a meeting, setting aside individual points of view or interests. Staff affirmed their distributed and enabling leadership that generates ***clear, transparent and accountable direction*** in their work.

7. The ***role of director*** is central to translating QSA's Quaker ethos and values into organisational norms and practices. Our director is critical to blending our underlying Quaker-based ethos, the leadership role of trustees, the strategic direction of the charity, the day-to-day delivery of QSA's strategic objectives and the quality of professional practice by staff.
8. ***Leadership in the trustee body is shared by all***, with Council's office holders, especially the clerk, having particular responsibility to uphold and nurture QSA's Quaker identity.
9. ***Partnership is an important attribute of leadership*** particularly that between the clerk and director.
10. Moreover, ***we believe QSA's Quaker identity strengthens QSA as an organisation, making it more effective and robust***. Much of QSA's strength and reputation is built on principled action and steadfast upholding of values, a willingness to build evidence-backed, creative projects that bring tangible benefit to people rather than simply deliver work that attracts funding. It is founded on a belief in the capacity of people living on a low income to seek and adopt changes in their lives that address the problems they encounter. QSA's Quaker identity is deeply resonant with this in its emphasis on listening, respect, of valuing each person, taking a long-term view, willingness to take risks and deeply principled commitment to change. ***We have confidence that the Quaker values, ways and practices at the heart of our organisation and its governance are deeply congruent with, and underpin, QSA's operational effectiveness.***

By the end of the formal inquiry process, therefore, trustees and staff had affirmed the importance of the Quaker dimension of QSA and the value they put on its Quaker history, values, ways and practices, and the support and interest in QSA of the Quaker community. We affirm and trust that QSA's Quaker identity is instrumental in enabling the purpose and delivery of the organisation, furthering our vision of creating a just world where people put people first. When trustees held a scheduled trustee meeting in November 2012, we accepted a paper prepared by the clerk summarising our principal conclusions and began work on its practical implications.

PART 3: A CLOSER LOOK AT THE Q-BIT

After each step of our inquiry we gathered the material from the day as a harvest of the learning, insight and questions that would lead our journey onwards. This provided both data and a narrative that documented our growing understanding of QSA's Quaker identity and examples of it at work. This helped QSA trustees agree the broad conclusions from our work and draw up a proposed strategy of implementation.^[1]

The broad shape of our learning is shown diagrammatically below. At our heart are QSA's Quaker values, ways and practices. These are given expression in our governance by the use of Quaker business methods, and operationally in working practices that shape the relationships of trustees and staff and with our service users and stakeholders.

This Part of the report and the next two take a closer look at the material we gathered. It lays out our learning about core Quaker values, ways and practices at the heart of QSA that trustees and staff identified collectively as *our Q-bit*. This constellation of values, ways and practices are not necessarily identical to those at the heart of Quakerism generally or other Quaker-led organisations. But it does say something about *us*, about QSA, and we believe is recognisably Quaker in nature. For us this marries our Quaker heritage with a culture which is alive for staff in the organisation and for trustees brings life, vitality and meaning to our governance.

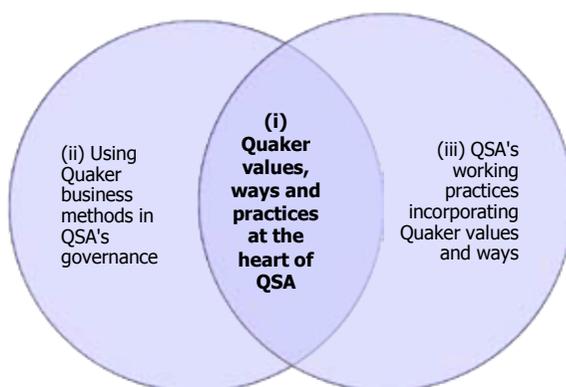


Figure 1 The Q-bit – QSA's Quaker Identity today

¹ The full paper can be downloaded from QSA's www.quakersocialaction.com/about-qa/quaker-identity

A marriage of Quaker Identity with QSA's Working Practice

QSA is a values-led organisation. Trustees, staff and volunteers unite around recognised Quaker testimonies^[2] – equality, truth, integrity, simplicity and peace – set out in our charitable objectives. This gives the charity an overall strength, consistency and principled heart. During the inquiry we came to see this as intrinsic to the identity of QSA as a whole. Although QSA is highly focussed on delivery and impact, it is its principled behaviour (not simply target-driven or funding-led) that is core strength and consistent with Quaker practice: the Q-bit.

In our inquiry session with staff we reached a pivotal point. This was apparent to us at the time and it was given powerful expression as we compiled our list of shared values, ways and practices. This was an important moment as we recognised and gave voice to QSA as a whole.

SHARED VALUES, WAYS AND PRACTICES THAT GIVE VOICE TO QSA

- **Silence and quiet** for reflection on our work, especially in a group
- Seeing the **very best in everyone**
- **Respect** for each person and **equality**
- Speaking **plainly**
- **Hearing all** views and voices
- Welcoming **diversity**
- A determined **search for unity**
- Accepting that **we might be wrong**
- Always **acting according to conscience** and willingness to do the hard or unpopular thing when we have discerned it to be the way forward
- **Mindful reflection** or discernment in order to work out what is the right thing to do
- **Challenging** ideas with care - testing ideas or concerns
- Waiting for **clearness** (*) before we act

In the joint trustee and staff inquiry session, we realised that the values, ways and practices that inspired trustees also gave shape and form to a way of working that

² Testimonies – expressions of Quaker understanding of certain values and principles which are central to Quaker faith and putting this into practice in life www.quaker.org.uk/more-about-testimonies, (Accessed March 2013)

* *Clearness*: a process of reflection, testing, and listening for an individual or group's inner voice of truth to discern a decision or way forward beyond habitual thinking, confusion, fear, assumptions and advice

staff recognised among themselves and in their relationships. This generates a distinct character in our organisation. From the inquiry we see it is the *combination* of values, ways and practices that generates this character. It is its *wholeness* that matters, so increasingly we described it as a *constellation*. This is a dynamic word and conveys it's more than simply the combination of values, ways and practices. Each element acts on others and there is a *synergy* in which the whole is more than the sum of the parts, and the whole feels qualitatively different.

We tested and gave this substance to this shared understanding by compiling a list of Quaker-inspired ways of being and relating that we see as intrinsic to QSA, at the heart of who we are and how we do things.

Having named these values, ways and practices at the heart of QSA, Parts 4 and 5 of this report take a closer look at how they are present in trustees' governance and the way staff work and relate. This, in turn, sheds more light on why QSA sees the communities we serve as agents of change and we focus our projects on enabling service users' resilience and potential to address the problems that affect their lives.

We began to see all this as foundational in generating an organisational *culture*. As we explored this more deeply, leadership also emerged as important.

What do we mean by *culture*?

The *culture* of an organisation is the set of beliefs, behaviours, values, norms, practices, perceptions and taken-for-granted ways of working that give substance to the distinct characteristics by which an organisation can be recognized - its *identity*. These can be learned or passed on to incoming members - *transmission*.

As quoted earlier, Otto Scharmer talks about "the deeper source, the inner place from which a system operates"³. During our inquiry we clarified our understanding of the nature and substance of the Quaker identity at the heart of QSA. We recognised it depends on trustees' enduring commitment to the deeper source and inner place from which our governance comes. We see this as trustees' commitment to being spirit-led, and the spirit in which operational work and services are delivered by staff. The nature of leadership is a vital element in this. As the inquiry progressed we increasingly recognised its importance and the variety of ways in which leadership is exercised in QSA.

"Team meetings always allow everyone to be heard and to suggest new approaches. Often these approaches are given time and space to be tried, tested and evaluated in a way I haven't experienced in other places where there is a set way of doing things and you the worker have to learn this to progress!" – *a member of QSA staff*

³ Scharmer *ibid*

Leadership

Leadership in QSA is distributed. We affirm leadership in the ideas, insight, skills and imagination contributed by staff and trustees across the organisation.

Operationally, there are specific leadership roles that facilitate effective conduct of our work through central functions of management and management of each project. Similarly, in governance, trustees collectively exercise leadership through our Management Council and in appointment to roles of clerk, assistant clerk, treasurer and conveners of standing committees.

Operational leadership by central and project managers is largely responsible for determining how we give practical application to QSA's purpose and strategic priorities. The role of director specifically connects QSA's strategic development with delivery of its mission. In his 1949 Swarthmore Lecture, Roger Wilson^[4] considered the differences between an individual acting with authority and leadership in taking forward a concern and when this is done by an organisation. He seems to be saying that an organisation can express a Quaker identity in holding fast to basic truths and practices. But it also has to be effective in its performance. Difficulties can arise if individual responsibility, authority and leadership is confused with the nature of responsibility, authority and leadership necessary in an organisation. In organisations he drew a distinction between the responsibility for what is done with how it is done and ensuring its execution (see adjoining box).^[5]

In his 1949 Swarthmore Lecture, *Authority, Leadership & Concern*, Roger Wilson drew a distinction between moral and administrative responsibility: "To determine **what** shall be done and **the quality of spirit in which ends shall be pursued**, is a moral responsibility; to determine **how** that shall be done and **to see that it is done**, is an administrative responsibility within the moral framework."

The operational leadership functions of QSA may be seen as akin to Wilson's administrative responsibility. Leadership through governance, and placing Quaker identity at the heart of our organisational culture, may be seen as akin to Wilson's moral responsibility.

Judith Moran, our current director, has been in post over ten years. Whilst not a Quaker herself Judith has deep appreciation of the ways of Quakers. She further combines professional experience and skill with her personal qualities. Judith's leadership has shaped QSA's director role with great skill and insight. As a result staff integrate values central to our Quaker identity into day-to-day working practices alongside effective delivery of, and accountability for, QSA's work. Trustees appreciate and value these skills highly, and recognise their significance in succession planning when the time comes for QSA to appoint a new director.

⁴ Wilson, Roger (1949) *Authority, Leadership and Concern*, Swarthmore Lecture, Quaker Books, London

⁵ With thanks to Jennifer Barraclough for sharing her understanding of the point Wilson was making

Wilson describes the moral domain of leadership as determining what shall be done – strategic purpose and priorities – and the quality of spirit in which these ends are pursued. Trustees, director and senior managers share responsibility for this domain of leadership. In QSA's distributed leadership model, staff exercise leadership as they use creative imagination in translating the spirit of what is to be done into moment-by-moment relationships with service users.

Leadership in governance concerns leadership by trustees in demonstrating and upholding the Quaker dimension of QSA's organisational identity. As we appoint non-Quaker trustees in the coming years, QSA will rely on Quaker trustees to pay attention to this vital element in the life of QSA.

Trustees appoint a clerk from among themselves and entrust the trustee appointed as clerk with a wide-ranging role in leadership. The clerk is entrusted with enabling a collective or collegial leadership amongst trustees as a group. The clerk works closely with the director in upholding the essence and purpose of QSA. The clerk is also appointed to the formal role of chair of trustees with defined responsibilities for linking the governance and operational aspects of QSA, line managing the director and being accountable to trustees. The clerk is entrusted by trustees with guiding and upholding our use of Quaker business methods and, between meetings, for ensuring follow up to minutes. Informally the clerk also upholds the inner work of the group they serve and how best to facilitate its working and its decisions.

But there is an underlying and more potent exercise of leadership in QSA.

Leadership is shared, creative and facilitative and exercised continually by staff as they go about their work. Leadership can arise anywhere in the system, manifesting as individual staff take initiatives, hold responsibility and

"to everyone is given a measure of the light" *Quaker Faith & Practice 3.05*

demonstrate wise judgement. This generates the creative expression of QSA's purpose through our work, and shapes QSA's organisational response to the needs we encounter in the east end of London. In putting so much emphasis on our service users as agents of change we also support them to develop their power to find solutions to the problems that affect their lives, where they have the capacity to do so.

Another facet of this model of leadership is that it is non-hierarchical. Just as the creative insight or willingness to take an initiative may come from anyone, so anyone will take up a task because it is there to be done. This enables the organisation to access the intelligence and common sense of the whole and of all. This is congruent with Quakers' perception that equality is not simply equality of opportunity, access, justice or redistribution of income – though it includes all of these and more. Equality springs from 'seeing that of God' in everyone, thus each and every person is of equal worth, each voice valued for its wisdom and potential and for its essential place in the whole because they *are*. Worth is an inalienable dimension of every person.

~ and spirit-led

The underlying inspiration in trustee meetings, in keeping with Quaker business methods, is that we are spirit-led. The language familiar to the seventeenth century would express this as the will of God. Whilst this term was in use amongst early Quakers, they were as likely to refer to the will of God as 'the inner Light' or 'inner Teacher'. Today, some Quakers find the phrase 'will of God' meaningful. Many Quakers, however, cannot accept it as it was commonly understood over three hundred ago; there are many different ways of articulating what it is and what it means but no single expression that captures the spectrum of meaning.

"In a meeting rightly held a new way may be discovered which none present had alone perceived and which transcends the differences of the opinions expressed. This is an experience of creative insight, leading to a sense of the meeting which a clerk is often led in a remarkable way to record. Those who have shared this experience will not doubt its reality and the certainty it brings of the immediate rightness of the way for the meeting to take." *Quaker Faith & Practice 3.06*

However individual Quakers express being spirit-led, there is a clear need to address the question of how it is recognised. Peter Eccles notes: "Early Friends considered that the leading of the Spirit, the Inner Light, was always true: that it was infallible. But there still remains the question of how we recognise the leadings of the Spirit correctly either individually or in corporate decision-making."^[6]

For Quakers *leadings* are "the promptings of love and truth in your hearts"^[7]. Sometimes this is experienced as being nudged or prompted by our impulse to give life and form to love or truth. This sense of *being led* may leave no other choice. Sometimes that is simply an accurate description of what the experience feels like. On other occasions being led may feel more like responding to inspiration or clear insight. There are many ways in which Quakers perceive a leading. Whatever the precise form, once discerned and tested, being spirit-led is accepting that leadings or promptings give direction and focus that point persistently to a decision or course of action. Such leadings may crystallise a generalised and felt-sense of a larger whole; some Quakers discern this as the movement of spirit.

"God as the inspiration and co-creator is the foundation of all we do. This infuses our actions as individuals and as a community." *Notes from QSA Quaker identity inquiry session at Woodbrooke Quaker Study Centre.*

Quaker business methods provide a framework and methodology for such spirit-led leadership, a process for testing it and a process for articulating its direction. At QSA trustees' meetings, as at all Quaker business meetings, we try to seek 'the sense of the meeting' enabling us to 'reach unity' and articulate this in a minute.^[8]

⁶ Eccles, Peter (2009) *The Presence in the Midst*, Swarthmore Lecture, Quaker Books, London

⁷ *Q&P* 1.02

⁸ "The unity we seek depends on the willingness of us all to seek the truth in each other's utterances; on our being open to persuasion; and in the last resort on a willingness to recognise and accept the sense of

This is qualitatively different to compromise or consensus. A participant at the inquiry session hosted at Woodbrooke expressed it as quietly and persistently allowing this source of inspiration or compassion to “bring focus, balance and a falling away of personal agendas”. On yet other occasions being spirit-led feels more prosaic but may be no less valid for that. But it is not easy and we are not always able to reach unity. QSA trustees have experienced the difficulty of finding unity when we have a wide range of perceptions on a matter amongst us, such as a mooted application for lottery funding.

Arthur Larrabee describes (in relation to local and yearly meetings) the relationship between spirit and human experience in a Quaker model of leadership: “*the Spirit and the individual are in an unbroken and continuous relationship. In worship, the Spirit has the leadership, informed by our human experience. In the organizational work of our meetings, individuals take the leadership, but we expect that their work will be informed by spiritual experience.*”^{9]} Reflecting on our exploration with Quakers from other Quaker organisations, this helpfully clarifies an aspect of our inquiry theme of exploring best practice in using Quaker business methods in the context of an incorporated charity.

Key to understanding the Quaker model of business methods is “the falling away of personal agendas”. As this happens, a space opens for an emergent ‘knowing’, one that is neither captured nor identified with any single view or agenda. During the inquiry, particularly when trustees and staff met together, we realised that that best practice depends upon a fusion and synergy between the Quaker values, ways and practices that guide trustees and shape our priorities and decisions and the working practices of staff as they embody and give practical application to this emergent knowing. This opens a space for the potential of the organisation to be heard and thus realised.

The heart of QSA’s Quaker identity

By the end of our inquiry we had gained a qualitatively fresh understanding of QSA’s Quaker identity and its depth, although it is still intangible to a degree. We also accept our responsibility to nurture it. We observed QSA’s Quaker identity, based on our values, activated through Quaker-led governance and in staff working practices and relationships. Having established this, we need to balance unduly rigid observance of these ways and practices – which can stifle the spirit of how things are done – with drifting away from its key elements and diluting its essence. An important lesson we have learned is the need to tend it and, like a garden, weed and nurture it in each season or rotation of trustees. We will continue to work with new incoming trustees and our director to find effective ways to make sure trustees and staff alike are aware of the Quaker values, ways and practices at the heart of QSA and how they are embodied.

the meeting as recorded in the minute, knowing that our dissenting views have been heard and considered.” *Q&P* 3.06

⁹ Larrabee, Arthur (2007) *Leadership and Authority in the Religious Society of Friends*, Walton Lecture, Southeastern Yearly Meeting, Florida

PART 4: A CLOSER LOOK AT GOVERNANCE EMPLOYING QUAKER BUSINESS METHODS

"It is our experience that group decision making is an act of corporate worship, a time when we come together to open our hearts to God's leadings in ourselves and in others. Although this is often referred to as seeking 'the will of God' I prefer to think of decision making as a creative process... What matters is not so much the decision as the process, a process of the corporate discovery of a way forward which is true to our experience of God's world."¹

QSA's Articles of Association lay down that decisions are made using Quaker business methods. One of the intentions for the inquiry was "...to explore best practice in using the Quaker Business Method in the context of an incorporated charity". During the inquiry we gave a lot of attention to Quaker business methods as we realised how important we found these to be in QSA's overall Quaker identity. This Part of the report gathers together much of the material from two sessions during which Quaker business methods were a principal subject of consideration. The report considers what we found to be key elements in these methods and goes on to present what we, with our Quaker guests, highlight as necessary for its good and skilful use. This, we hope, will guide QSA trustees in future as we seek to move further toward best practice ourselves.

At an inquiry session at Woodbrooke Quaker Study Centre, together with others experienced in Quaker-led organisations, we summarised key elements in Quaker business methods. This helped us understand how Quaker business methods are central in embedding organisational ways and practices that shape the culture of QSA as a whole.

Key elements in Quaker business methods

- **Building and maintaining trust** – in each other, in the process and in robust reflection on issues
- **Clear and mindful processes**
- The unique Quaker practice of **writing a minute of discussion and decision contemporaneously** in a meeting as part of **a mindful search for unity and shared ownership of decisions**
- **Silence and inward reflection** to start meetings and return to periodically **during the flow of the business**
- A non-hierarchical perspective **open to wisdom wherever it arises**
- **Shared values**

¹ Eccles, Peter, in *The role of the clerk*, The Friend, 21 January 2000

- **Allowing the way forward to open through deep listening** rather than be imposed by a timeframe or agenda
- Holding a long-term view that is **willing to act 'outside the box'**
- **Giving matters the time they need**, whether that is a difficult decision, staff giving attention to service users, or trustees **waiting for clearness** in discerning actions
- Trying always to remain **open to 'the flow of a larger intelligence'**

Key elements in Quaker business methods

Fig 2 (see page 27) draws out observations from the Woodbrooke inquiry session and presents them as a complex cluster of inter-relationships underpinning the fabric of Quaker business methods. The basis of Quaker business methods is the *Quaker experience of spirituality*, founded in worship as “our response to an awareness of God. We seek a gathered stillness in our meetings for worship so that all may feel the power of God's love drawing us together and leading us.”^[2] From the depths of their experience in worship, early Quakers were led to uphold principles congruent with what they heard as the promptings of love and truth and they understood as “the leadings of God”^[3].

From Experience to Values, Ways and Practices

This awareness of God at the heart of everything led early Quakers to reflect on how to express the truth they had been shown as principles underpinning actions – their **values**. This is articulated particularly clearly in Quaker testimonies to equality, truth, integrity, simplicity and peace. During the inquiry session at Woodbrooke those present unpacked what we saw as the cumulative insights Quakers derive from their spirituality.

Cumulative insights and values from Quaker experience of spirituality

- We value that of God in everyone
- So we embrace the whole person
- We seek to manifest testimony to equality in how we treat every person
- We strive to model sincerity and integrity in our actions
- We value plain speaking and do this with respect (sometimes when we get this balance wrong it manifests as an unwillingness to confront)
- We come to meetings with hearts and minds prepared – but not decided
- We trust our spirit-led processes which often result in a tendency to take the long-view on issues. This leads to consistency, unity and willingness to take risks. People

² *Q&E* Advices & Queries 1.02 para 8

³ *Q&E* Advices & Queries 1.02 para 1

outside Quakers see us as reliable and consistent

- At our best we marry authority to act with sound administrative processes
- We strive to bear witness to our testimonies in what we do so we are consciously values-led
- We use our resources mindfully taking responsibility for them; examples were given of transparency and fair reward

Ways and **practices** then constitute the mechanics of Quaker business methods such as skills and procedures tried, tested and honed over the years. At Woodbrooke we reflected on those consistently found to be most important to us and our participants; they are shown in Fig 2 (p 27) as the word-cloud. This was affirmed in our next session with individual Friends we consulted about the nuts and bolts of Quaker business methods. This made it clear that these ways and practices are the life-blood of the method itself. At their best, they are used with great wisdom, skill and insight. However, it was observed by participants at the Woodbrooke session and again when our third session explored this in more depth, that sometimes Quaker business methods are used less flexibly and with less skill.

Familiar Quaker **ways** constitute 'Quaker discipline' including: frequent use of, thus comfort with, silence; deep listening to others, to oneself, to the sense of the meeting, to the direction of spirit; shared responsibility; speaking to the centre in a meeting not in dialogue with each other; plain speaking; hearing the 'measure of the Light' in all views and voices; respect; coming with heart and mind prepared and open; non-hierarchical and non-judgmental attitudes; holding on to the big picture; seeking clarity about the way forward. A quality at the heart of Quaker business methods is listening; it is a way of listening that is deep – hearing beyond the words – and active – engaged in opening of and to the heart.

Practices include clear and mindful processes, a fluency that facilitates the flow of the meeting, agenda preparation, consultation, threshing^[4], clearness, discernment leading to taking a decision, contemporaneous minuting, and prompt follow-up to a meeting such as distribution of a minute to those concerned in the matter.

Perhaps the most distinctive element of these Quaker ways is the process that leads to **contemporaneous minuting**, a minute drafted at the time by the clerk and accepted by those present as representing the sense of the meeting.

⁴ A meeting to hear and discuss a range of opinions and information. No decision is taken. This helps prepare for a later meeting at which a decision can be discerned and made

Our learning from the Woodbrooke inquiry session

During our Woodbrooke inquiry session, we built a picture of the importance of Quaker business methods in the work of our organisations, and the difference they make. Using Quaker business methods imposes a shared discipline of being together for the purpose of discerning our business affairs. We picked out those key processes in this discipline already reported (p 23-27).

As the session drew toward its end, we moved into ‘creative listening’ – an opportunity to digest what had been said, to go deeper and give voice to our appreciation of the gifts of Quaker business methods. This is summarised below and in the diagram on the next page (Fig 3):

- The value of Quaker business methods depends on the skill, experience and understanding we bring to their operation
- We know we need to be realistic. Quaker business methods do not always work well and we need to look at their impact when they are dysfunctional. Sometimes we lack the skill required for it to work well
- We noted there can be staleness or rigidity in how we use the business methods. This may contribute to a lack of freshness or inability to confront or lay down a matter that has come to a natural end
- There is still much to learn about thoroughness in threshing and testing concern
- Difficult decisions can be painful, bringing tears and division. We need to explore them openly and tenderly and learn how they might be done in a better way in future
- Sometimes we have a tendency to justify our views with a reference to being or not being ‘Quakerly’; we think this can lead to sloppy thinking and saves us from having to explain clearly what we mean by it
- Above all, we remember to keep trust with our processes and that, in time, ‘way opens’^[7]
- We affirmed that when we get the ‘plumbing’ right and practice our processes effectively and carefully they help us to take a long view in a steadfast and careful way

Emerging from this conversation was a strong and shared conviction that Quaker values, ways, and business methods have in the past guided us to inspired and courageous action, inspired others and hold great potential for Quaker organisations. However, in our experience the processes associated with Quaker business methods are not always fully understood or well done, thus not practised sufficiently well and this inhibits wise and confident decision-making.

⁷ “way opens” – a course of action is discerned and we trust a clear path to accomplish it will emerge

Quaker business methods are a **practice of searching** that is thorough, inclusive, takes seriously all points of view and requires all present to put aside their own existing convictions, attitudes, or views in the search for something that emerges from **deep discernment**. A decision is thus **deeply principled**

Willingness to wait and listen **creates space** for the lone voice to be heard, encouraging open, honest and engaging conversations. This helps **bring disparate and opposing positions into unity** so we move forward together.

The search for unity brings a **shared sense of responsibility and sharing of risks**. It requires **transparency**. The thoroughness of the search for unity may lead to **new thinking** as our deliberation leads us to possibilities we would not otherwise consider. This brings **confidence** - many avenues are explored and decisions are made together

Minutes record the sense of the meeting and are written contemporaneously. This process is a critical phase giving the meeting space **to focus, discern and test the detail of a decision**. **Leaving a meeting with agreed minutes gives us a shared sense of ownership and fosters a long-view which enables courageous action**

In **making decisions based on unity** Quakers seek the direction that they can best discern corresponds to 'the leadings of God', sometimes expressed as what love requires. Unity does not mean everyone necessarily agrees with the detail of the decision but agrees the decision has been properly reached using Quaker decision-making (right ordering) and can unite in agreeing that it seems to be the way forward for that group at that time. Decisions based on reaching **unity** put the decisions (and the organisation) on a firm footing

Figure 3 An underlying flow in Quaker business methods

QSA Trustees' subsequent reflection discerned clearly the need to examine the application of Quaker business methods in a practical and concrete way, particularly in challenging circumstances. This would serve us in clarifying guidelines to strengthen QSA's governance, and help us understand the relationship between the governance of QSA and its Quaker dimension.

What is needed for good and skilful use of Quaker business methods

Learning from an inquiry session on the detail of Quaker business methods at work

We gathered an invited group of Quakers who had substantial experience and understanding of applying the business methods in challenging circumstances in various Quaker settings. Our aim was to engage in sufficiently focussed work in one day to delve deeply into the nuts and bolts of Quaker business methods and engage with both their grit and grace.

This was an approach familiar to our facilitator, Clíodhna. She said: “In some ways this exercise is like many of the management development exercises or corporate inspection exercises I carried out in the Audit Commission and the process I suggest reflects some of that experience. However, our Quaker business methods aspire to being a spirit-led process and not just a principled, rational management decision-making process so our conversation needs to invite this other dimension into our conversation.”

For this session we asked our guests to reflect on their own experience of using Quaker business methods and prepare, as a case-story, an incident drawn from their own direct experience that would illustrate the nuts and bolts of Quaker business methods in challenging situations; this would give us material to explore the grace and the grit. This generated discussion focused around some issues we had set for the day:

- How to make sure our Quaker business methods serve us well in our most challenging moments
- How to improve our application of Quaker business methods and raise awareness of the importance of good process in our organisations
- How to deal tenderly with painful and disruptive processes
- How Quaker business methods in turn influence organisational practices and norms throughout our organisational life

Our participants brought much experience and wisdom. They contributed enriching and insightful reflection and analysis in many ways and at different levels.

“I was very moved after the session and have kept returning to it.”

As we collated our learning afterwards, we found we had gathered a clear articulation of the principal aspects of the workings of Quaker business methods – what is needed for it to work well. We also uncovered a new topic on the rightness of decisions that arose late in the day and for which we simply captured initial thoughts. We made a summary of our key learning points.

**NUTS AND BOLTS OF THE WORKINGS OF QUAKER BUSINESS METHODS
- WHAT IS NEEDED FOR THEM TO WORK WELL**

TRUST

a. Building and Maintaining Trust

- The need for trust at all levels for Quaker business methods to work well in difficult circumstances

b. Trusting the Process

- Holding outcomes lightly and being at ease with open-endedness
- Accepting there may not be an outcome or that an unexpected outcome can lead to something new and generative
- Fostering ownership of process through involvement and engagement by members
- Making visible the values underpinning the meeting or the process and engendering trust that way
- The power of affirming and recognising when things work well builds confidence in the process

c. Trusting the Information

- Making sure that information is challenged and scrutinised so testing is seen to be alive in the process. This contributes towards the mutual trust in one another and in the information presented

d. Being Proactive in Engendering Trust

- Helping trust to emerge/be nurtured through effective induction
- Active commitment to frequent and appropriate communications at all levels to build trust
- Valuing the process of Quaker business methods creates shared understanding and ownership of decisions that establish trust
- Careful and steady handling of difficult moments builds trust and relationships

CLERKING

a. Skilful Clerking

- The clerk nurtures a climate and ethos in which business process can be exercised
- Clerking, well done, inspires confidence
- The clerk sets a tone by holding the business well and holding it rightly. This has the effect of steadying the meeting
- The clerk ensures issues are clarified
- The clerk is the servant of the meeting with no personal agenda and is clearly an enabling role
- Good clerking models and encourages a quality of listening that ensures that everyone hears and feels heard equally
- A clerk helps us in steady holding of ongoing matters of concern
- A clerk holds the group and its needs tenderly between meetings

b. Clerks give effective leadership which is then trusted by the participants

- Reminding Quakers of the discipline of adhering to the process we are using
- Supporting people to carry out their roles well including outsiders to the process
- The importance of nurturing use of Quaker business methods, training ourselves in

their use, and induction for those less practised in the discipline

- Empowering people to take a fresh look, welcoming new ideas without suspicion and welcoming all voices
- Nurturing a healthy seed of a new idea or approach, protecting it and allowing it to grow until it gains sustained unity
- Clerking calls for work outside the meeting such as reassuring and nurturing people in difficult roles both before and after the meetings
- Continuity of leadership approach (not necessarily of individuals) allows initiatives to be developed over the long-term
- Staggered appointments are helpful in maintaining continuity

CLEAR AND MINDFUL PROCESSES

a. Careful cultivation of a generative ethos

- By demonstrating an active and convincing commitment to non-hierarchical ways of operating we build trust
- Commitment to clarity
- Having a good sense of the meeting's identity, its responsibilities and ways of operating, means people can engage with confidence
- Our own confidence in the process grows when we take care to make sure there is clarity and transparency about:
 - Roles
 - Responsibility
 - Processes
 - Structures
 - Delegation
 - Representation
 - Personal or professional tensions or dilemmas
- Importance of using threshing to identify issues that need to be addressed, hearing and considering a variety of views and voices, challenging and testing ideas, digesting and challenging issues, helps us see 'outside the box'
- Good agenda planning, and ensuring that the meeting owns its agenda creates a strong foundation
- Taking time for appropriate levels of consultation demonstrates the value we place on non-hierarchical ways and on transparency

b. Sharing of Responsibility

- By preparing ourselves spiritually and reading papers in advance, we come with mind prepared and heart open
- We share a mutual responsibility for taking care of one another and for stepping forward to serve
- We trust and support one another fully to fulfil roles
- We take time to make sure that different skills are valued and fostered
- In striving for integrity in Quaker business methods we also need to be sensitive to the vulnerability of the individual
- Integrity sometimes calls upon us to say things straight. Although this is sometimes difficult to receive we accept it as helpful and constructive

c. Contemporaneous Minuting

- The practice of writing, agreeing and owning the minute is vital. In this way the meeting owns the decision. Fairness and transparency are recognised by all and trust is built.
- When a minute is accepted as having integrity, all those present (from one of end of the spectrum of views to the other) know they have been heard and contributed to the process even if the minute is not what they anticipated or wanted at the outset
- Decisions may go through an iterative process. At any particular point a minute represents the best decision the group can make at that time
- Different skills are valued and fostered

d. Fluency of Process

- The design, layout and setting of our meetings needs to be conducive to the nature of the business
- Imaginative use of processes to foster new ideas and perspectives in the manner of threshing helps us to bring to the surface issues that need to be explored, to hear and consider a variety of views and voices in an informal environment, to challenge and test ideas. All of this helps us to see anew, to be imaginative and adventurous and finally, to discern deeply

HOLDING ON TO THE BIG PICTURE HELPS TO MAKE SENSE OF THINGS

- Providing the back-story for an item, making other relevant factors visible for everyone helps the decision-making
- Putting an issue into a wider context helps to bring balance and steadiness to the meeting. It completes the picture for everyone by telling them about related initiatives, meetings or structures
- Making connections between issues for people – linking things up helps everyone to see the whole picture and addresses the potential for conflict
- Agreeing the allocation of tasks reassures everyone that follow-through will happen and this builds trust and commitment

SHARED VALUES THAT TRANSFORM

- Our living commitment and earnest effort to maintain the personal and collective discipline of Quaker business methods and to uphold them as a spiritual discipline is a shared value that transforms our meetings
- Our understanding of our process as working with the will to good deepens our awareness and effort
- Prayerfulness
- Affirmation and recognising when things work well builds confidence in the process

How do we know if a decision is right?

As this inquiry session drew toward its close a final review brought to light a further concern we hold about our use of Quaker business methods. We began to question whether we can know if a decision was right. There may be hesitancy and reluctance to discuss this. It is difficult afterward to say that something was a mistake when we talk about the will of God.

In one sense there is no right decision as it is generally recognised amongst Quakers that, at its best, a minute records the direction and detail in which the group feels led to act at that time. As one of the Friends present put it during that final round in the inquiry session: “At the time we write a minute we cannot be sure we see the full picture – not all ‘the veils’ have been removed – thus we can only discern what we perceive to be the will of God at that time.” Consequences are inevitable and unpredictable when we make a decision.

Many of us are involved in organisations like QSA that are frequently bound by external requirements and timetables. We realise that when we cannot find unity and therefore do not make a decision, there are probably consequences which, in effect, amount to a decision.

One of the impulses behind our inquiry into the meaning of QSA’s Quaker identity today was QSA trustees’ anguish when we have been asked to make decisions on a suggestion from staff that a particular project fits into a tranche of funding being offered by the Lottery Fund. These decisions cause us sleepless nights, all the more so if the project in question needs a renewal of funding. Amongst us, we have a range of views. When we record a minute saying that we have been unable to find unity, we ask staff to set aside the application. Thus, not reaching unity has very real consequences.

We had outlined this dilemma during the inquiry. As we concluded our exploration of the nuts and bolts of Quaker business methods, we agreed we need to accept that we are accountable for our decisions and actions. Our reflections on this question indicate its sensitivity as well as its importance.

After Step 3 in our inquiry process, QSA trustees, with Clíodhna, again took time to reflect on the unfolding direction of our inquiry. We readily agreed that our exploring phase had gone as far as it probably could and much new material had been uncovered. We had made significant progress in deepening our understanding of Quaker business methods and what is needed to support us in using them well and skilfully.

Review of processes and decisions

We are only human so we cannot say that a good decision has been reached unless we look at it retrospectively. This may require evaluation against objectives and the impact of the decision. These questions summarise reflections from two inquiry sessions:

- Had the group reached clarity on what it was setting out to achieve?
- Did we, when needed, use methods such as threshing to generate ideas and possibilities?
- Do we understand the difference between discernment, being in unity and taking a decision? These are different stages in a process
- Are we looking back after the outcomes are clear?
- Can we evaluate our objectives and outcomes against our impact?
- What makes a decision one that was ‘right’ or right for the time and circumstances?
- Have we lived up to our decisions?
- Whatever happens we need to accept that we are accountable for our decisions and actions

We now needed to review, consolidate and find a way to draw together the threads of our work. As we began to sift and clarify for ourselves what we were learning and how that might be put into practice we realised we could not do this alone. At the first inquiry session QSA trustees had been clear about the importance of engaging with staff, meeting them to discuss what we were doing, hear and learn from them and together consider how it might affect us all. Our inquiry, and this report, therefore turned to engaging with how our Quaker identity is perceived by, and affects, staff.

We gained great insight from this part of our inquiry, recognising the distinctive role that Quaker business methods play in our decision-making and the need to nurture our practice of Quaker business methods so as to be able to offer our learning across, and beyond, QSA. For trustees, a key aspect of governance was deepening a shared perception of our values, ethos and practices as a transferable asset across the organisation, and, we hope, of value beyond it.

PART 5: A CLOSER LOOK AT QSA WORKING PRACTICES, QUAKER VALUES AND WAYS

Elsewhere in this report we recognise that QSA as a whole has a very strong and positive identity and that its Quaker dimension is one – albeit core – element in that. A fuller image of the identity of QSA includes the professionalism and passion that staff bring to the development of projects and delivery of services that express QSA’s witness.

This emerged strongly as a result of the joint trustees and staff inquiry session. When trustees and staff met together we began by sharing our experience of working for a Quaker-led organisation. We shared our ideas about the difference the Q-bit makes and what more might be possible in the future. From this we built on our understanding of our shared values, ways and practices. For these to come alive they have to have meaning in words and expressions that convey what they mean day by day at work and we articulated this too. Finally, we tested this by confirming we could find real examples of the values and ways expressed in relationships and practice – ‘what it looks like when it is happening’. This exploration into our lived experience gave substance to the congruence between the values and ways of working trustees employ in governance and those that staff embed in their practice and relationships with each other and service users. The table below summarises these shared Quaker values and practices and the language in which they are expressed by trustees and staff. Later (p39) staff add examples drawing on their experience of working at QSA.

QSA Trustees and Staff: Shared Values, Ways and Working Practices	
Values and ways	Shared understanding
Silence and quiet	Gathering ourselves before we launch into any activity and during discussion, especially when we are working in a group situation
Seeing the very best in everyone	Quakers often describe this as ‘seeing that of God in everyone’
Respect for each person and equality	We have no hierarchy of worth, all people are seen as of equal worth and potential wisdom
Speaking plainly and without artifice	We speak honestly and openly so everyone understands us and trusts our word

Hearing all views and voices in our decision-making	Treating all views and voices respectfully including when those views are different from our own
Welcoming diversity	Our decisions and working practices are enriched by our differences
A determined search for unity	The Quaker understanding of unity goes beyond 'consensus', thus we seek what might be described as the underlying direction and nature of a decision that all present can unite around
Accepting that we might be wrong	We all make mistakes and when they are accepted they can be used for our learning and to inform subsequent actions
Always acting according to conscience	Our willingness to do the hard or unpopular thing when we have discerned that it is the right course of action for us to take
Discernment	Mindful reflection in order to work out what is the right thing to do
Testing ideas or concern	Challenging ideas with care and diligence before acting on them
Clearness	Being patient – waiting for things to become clear for us before we act even though this may mean we make decisions a little more slowly on occasion

During this session, staff and trustees continued working together and used story-telling to share examples about where we had seen the Q-bit at work in QSA. We found recurring threads and patterns and explored with each other what they mean to us in our work. This gave us evidence that the key values and principles are active across the organisation:

During outreach work *Knees Up* came across a lady who was refusing to accept any help from health organizations. The lady in question was having multiple strokes. I was present during one of these strokes and witnessed her refusal to go with the ambulance to hospital. The ambulance team explained that her condition was critical and needed to be treated.

Knees Up values building relationships based on 'Respect for each person and equality'. This was a great help in this instance as there was a gradual move towards the acceptance of help. The Community Stroke Team became involved. A care plan was drawn up by the Adult Social Care and handrails were installed to help her around the house. A sofa-bed for downstairs was purchased by her son. She can use this when she has not got the strength to sleep upstairs. The physio has recommended to the council a walk-in shower.

I believe that the 'Respect for each person and equality' was one of the seeds that allowed this positive change to happen.

A member of QSA staff

- QSA's working environment places a high value on a quality of **listening** to one another and to the people it serves. It has become a reciprocal and central quality of attention between people – trustees, staff, volunteers and service users

- Trustees strive to **hear all voices and opinions** as part of their search for unity in decision-making

- People feel welcomed and appreciated for who they are - **affirming the value of each individual**

- The director and staff place the **quality** of the work ahead of the prevailing external pressure to justify everything by 'bums on seats'

- Both staff and trustees give their work the **time** it needs, both in preparing and delivering services and by staff giving clients and service users the time they need, resisting the pressure to put quantity before quality. We recognise this is crucial if the quality and integrity of the work is to be translated into outcomes for local people

- Trustees in particular value waiting for **clearness** before taking action. We believe the quality of discernment and decision-making is transformed by such patient waiting and "openness to the Light"

- Staff talked about an ongoing commitment to **questioning and reviewing** honestly the impact of their work echoing the Quaker commitment to

threshing and to testing

- **Silence** as a pathway to a deeper discernment is an established practice for trustees and they have come to trust it deeply, particularly at moments of great difficulty in decision-making. Some staff like to encourage silence at the start of the day's work
- Staff experience QSA as a '**values-led**' organisation, an organisation with conscience that gives their work a meaning and richness not easily found in the workplace

Examples given by staff members from their work at QSA

As this report was written, staff were asked to give further examples of how they put these values and ways to work amongst themselves and with service users. The response and depth of thought they gave in replying as much as anything else is testimony to the importance they place on them.

Silence and quiet: “With families we work with we allow for quiet as people gather thoughts, or sit with what others have said. It is an important part of the process, for people to be able to think, feel, process and share.”

Seeing the best in everyone: “When working with residents one-to-one, we try to make this time positive in many ways. As well as dealing with problems that have been raised, it is important to encourage and listen to stories that the residents are proud of. One man had raised his daughter as a single parent. This relationship is so full of devotion, with wonderful stories that he wanted to share. Although the daughter has special needs which demanded extra care, the challenge was met by a proud father. This relationship had, he felt, brought out the best in him.”

Respect for each person and equality: “This I think is what QSA is all about! Every client is treated by all staff as equal to all, and each person given the support that they need that we are able to give. Staff are also treated this way, with a wonderful culture of respect for staff that plays out in consultations, flexibility, support, and the general feeling of QSA. The kindness of all staff, trustees, and volunteers and how they are treated speaks volumes of this.”

*“Within a few weeks of working for QSA you know you are working somewhere different – you soon learn what it’s about.”
a member of QSA staff*

Speaking plainly and without artifice: “We speak honestly and openly so everyone understands us and trusts our word.”

Hearing all views and voices in our decision-making: “As part of the current work on the Estate we are helping to organise an evening where residents, housing officers, local school leaders and counsellors can come together to hear the views and concerns of other individuals, all with conflicting priorities.”

Welcoming diversity: “Team meetings always allow everyone to be heard and to suggest new approaches. Often these approaches are given time and space to be tried, tested and evaluated in a way I haven’t experienced in other places where there is a ‘set way’ of doing things and you the worker have to learn this to progress!”

A determined search for unity: “The ongoing willingness of the trustees to find answers to difficult questions, in a way that fits with their values of the organisation and reflects Quaker beliefs. And the willingness to then share this with staff, and engage with staff for their feedback”

Accepting that we might be wrong: “Good coaching is based on the principle that the coach does not know more or better than the client. Rather the coach engages in an authentic and equal partnership of exploration with the client to help them discover their own truths. A good coach is willing to admit they have got something wrong.”

Always acting according to conscience: “We as an organisation, and project, are constantly looking at our work and the best way forwards in all areas. This means we as an organisation are willing to make very difficult decisions, such as stopping projects if there is no longer a need, changing direction of projects, changing how we deliver. This is supported at every level, by staff, Judith, and trustees.”

Discernment: “My experience of QSA is that there is encouragement and permitted space for regular reflection, evaluation and critiquing, both individually and with others. This feels like it’s part of the culture of the organisation though it’s never been anything that has been explicitly said to me. It is not lip-service: because it is important, time spent on it is given equal value in terms of workload as other work. It’s not ‘extra’ that you do in your spare time.”

Testing ideas or concerns: “When looking at how to take *Knees Up* forward into a new cycle, it was important to look carefully over what has happened in the past, specifically what worked and what didn’t. After re-working the project, I tested the idea by seeking the thoughts of colleagues. I asked them to challenge and offer feedback to ensure my ideas worked outside of my head as well as inside it. Having listened to the thoughts of others I was able to adapt and significantly improve the quality of the project.”

“I think using a ‘tick box’ for our examples isn’t as helpful as it’s meant to be. I think a lived expression of Quaker values is supposed to be much more messy, and I don’t want to try to make my example fit only one or two of the boxes - as I think it cuts across several of them.

When we were writing the text (prose) for the Annual Report, I purposely paused (I don’t know if this is being silent - some may say so).

I wanted to check that we weren’t just reinterpreting Quaker/QSA values in our own words.

Some of the text we were able to change to fit more closely with Quaker expressions of the same values, and we did this.

Likewise, the text on the website, specifically in the supporter sections, I consciously think about how it reflects Quaker values and ethos, sometimes using the Annual Report as a ‘crib sheet’. There’s even one photo that was chosen because it ‘leads to the light’.”

a member of QSA staff

Clareness: “Our groups are about process, and letting people find their own ways. We offer insights, experiences of others, and information where needed – but recognise that everyone will take action when they are ready - we can support the process, but then can only be there if needed.”

The stories from staff gave us assurance that QSA’s Quaker ethos and values are manifest in QSA from the very first point of contact. QSA trustees see how these values shape both trustees’ governance and the day to day work of staff with one another, with clients and with other stakeholders. This also helped us recognise the role of director as critical. The director is central to the flows of values, ways and practices of the organisation as well as information, scrutiny, decision and direction. For QSA’s Quaker ethos to continue to be alive throughout the organisation we rely heavily on a number of factors: the director’s skill and heart; a generative and respectful relationship between director and clerk; and trustees visible fostering of the congruence between governance and operational values and working principles.

As our working session ended we affirmed the value of the time spent talking and working together, gaining deeper insight into QSA’s work and its future potential. We had a general feeling of work well done. What we gained was a clear convergence of thinking between staff and trustees on the power of the Q-bit at work in QSA, its influence on the quality and impact of our work and the need to nurture and amplify this by taking it out into the community and beyond with renewed confidence. This added a significant strand to the findings of our inquiry and helped us frame our response to one of our starting questions - how Quaker values, identity and witness are expressed through QSA.

“The Q-bit for me stands for Quality”
a member of QSA staff

PART 6: AFTERWORDS – A THINK-PIECE^[1]

A participant at one of our inquiry sessions, Christine Davis, said of Quaker business methods “this is a treasure we hold in trust and must not hide under a bushel.”

When we initiated this inquiry, and certainly in our early conversation with JRCT, we hoped some of what we learnt might be useful beyond simply informing QSA trustees. Gaining more clarity about our Quaker identity might help us make it more accessible to QSA’s majority of non-Quaker staff and volunteers and, in due course, non-Quaker trustees. We hope it will help us communicate our Quaker stance clearly to stakeholders and the communities we serve. Many organisations struggle with marrying effective performance, taking responsibility for the impact and external consequences of their action and behaviour, and upholding a clear ethical stance. The central elements and approach to governance of Quaker business methods are not a complete answer, and not necessarily applicable to all organisations. But we believe our inquiry confirms the benefits QSA derives from such methods.

What can be shared from our experience? Our primary finding is a clearer understanding of a constellation of values, ways and practices that generate a culture with a heart that is strong, consistent and principled yet effective in operation. What is the purpose of sharing this more widely? Douglas Steere, an American Quaker involved in ecumenical and inter-faith dialogue, spoke of ‘mutual irradiation’: a dialogue in which “*each is willing to expose itself with great openness to the inward message of the other, as well as to share its own experience, and to trust that whatever is the truth in each experience will irradiate and deepen the experience of the other.*”^[2] This last Part of the report offers, therefore, some suggestions for reflecting on our learning and applying it to situations familiar to you, Quaker or non-Quaker.

Humility as a first step

QSA trustees wouldn’t suggest we have the answers but we simply reflect on what we have learned, how this might have value organisationally and individually in other situations, and share our experience. This think-piece is deliberately presented in more or less note-form to speculate on future lines of discussion.^[3]

We recognise shortcomings in the way Quaker business methods are used. At our inquiry session at Woodbrooke we noted many occasions when Quaker use of business methods is not as skilful as it needs to be. Whenever we recruit Quaker trustees we are reminded that Quakers as a community are relatively weak in

¹ Think-piece - a piece of writing meant to be thought-provoking and speculative that consists of background material, opinion and reflection

² Steere, Douglas (1971) *Mutual Irradiation*, p7, Pendle Hill Pamphlet 175, Pendle Hill Publications, Wallingford, Pennsylvania

³ My thinking in this section has been helped by fruitful discussion with Clíodhna Mulhern

particular skills and experience such as governance, marketing and human resources, which could strengthen the practice of Quaker business methods.

As QSA trustees we are inspired in our service, moreover, by observing and experiencing an organisation that has grown through the endeavours of many people over a long time. As result QSA has become very good at what it does in a multitude of dimensions. We respect that QSA’s Quaker identity is one, albeit vital, part of that and affirm the many and combined elements that have built the organisation.

Imagine we’re knitting a woolly jumper – that’s QSA - and perhaps it’s a garment of many colours and patterns – each adds something unique – and it is beautiful. We might see that some threads and patterns are from a particular sheep or knitter – Quaker ones. But take them out and the jumper unravels; look at them on their own and they don’t make a jumper. Nevertheless, let’s try to tease out some threads in case it helps other people understand our jumper or strengthen their own design.

Applying the learning from QSA’s inquiry

From the evidence of our inquiry, four elements consistently emerged as recognisable Quaker threads: *being spirit-led*; *leadership*; *good process*; the generation of a *culture*. In the review that follows, each element is presented with a *seed thought* from which *some challenges* arise and we see *some opportunities*.⁴ A few of these challenges and opportunities – mainly arising from our inquiry session with other Quakers – are selected to stimulate reflection.

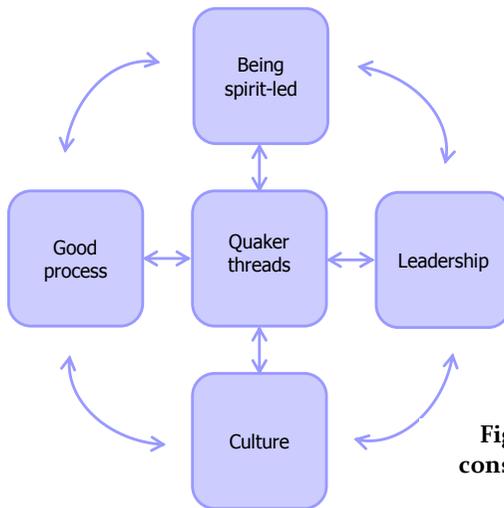


Fig 4 Quaker threads consistently observed in our inquiry

⁴ This represents the learning of QSA trustees from our inquiry and is not necessarily the view of Quakers in Britain. It is offered as a stimulus to your own reflection rather than as a detailed review.

Being
spirit-led

I. BEING SPIRIT-LED

Seed thought

For Quakers, being spirit-led is discerned through a process that culminates in reaching unity. The nub of reaching unity is that the decision-making group makes a decision that articulates, as best they discern at that time, their collective search for the leadings (perhaps movement or flow) of spirit, recognised in the ‘sense of the meeting. This is in contrast to a decision being made by a majority or those present exercising their personal power or pursuing an agenda that represents narrow interests. This openness to being led is resonant with notions of emergence and wholeness.

“Discernment is a spirit-led process, both a personal and a collective experience, for which we must be well-prepared both personally and collectively. Our experience of discernment takes many forms: the sense of ‘right-ness’ we feel when a decision has been reached is the result of a disciplined process which may have taken many twists and turns, through silent expectant waiting at business meetings, social interaction, personal reflections and shared experiences of many kinds. When we engage in discernment we are committing to laying everything before one another, a kind of spiritual listening with which we test the vision we discover and share together. Robust discernment does not end at the door of the meeting-house, but permeates our lives.”⁵

Some challenges

- How are we sure we are being spirit-led? How do we manage business when we are unable to reach unity?
- We learned that different Quakers understand being spirit-led differently. The spectrum ranges from hearing the still small voice of a traditionally perceived God to attuning to energy or Spirit or the highest in our humanness; not all Quakers find the language of ‘the will of God’ or ‘the leadings of spirit’ meaningful. Fig 5 on page 45 shows one way we probed what this might mean to some of us
- The concepts and language can be challenging. A member of QSA staff, reflecting on whether the phrase “seeking the will of God” had any meaning for them, commented “I would be uneasy and discouraged from participating in any meeting where God figured, despite feeling more than fine with Quaker ways as a way of working.”

Some opportunities

- Associating the concept of being spirit-led or seeking the will of God with the purpose of an organisation offers the possibility of those connected with it enlarging their awareness of as yet unrealised possibilities and potential

⁵ From a Minute of Yearly Meeting Gathering 2009 Planning Committee/2008-02/14



- We recognised that Quaker business methods offer a way for harnessing such deeper processes of feelings and heart and ‘non-rational’ ways of knowing. These point toward a dimension of human experience that consistently reports knowing or attuning to a source or wisdom that is larger than our own field of perception
- During our QSA Quaker inquiry, we made a conscious effort, with others, to go beyond the words describing our experience of using Quaker business methods. This enabled us to enlarge our own understanding of what is at work when we use Quaker business methods and hopefully be more skilful in their use
- There is much strength in a method of decision-making that is based neither on a majority view nor a simple consensus. In particular the Quaker model rests on the power of decision-making held by the group as a whole
- Other models of decision-making may marginalise those in the minority or suppress disquiet and contrary views^[6]
- There is growing awareness of what is, elsewhere, called ‘collective intelligence’^[7]

Leadership

II. LEADERSHIP

Seed thought

“To be without an ordained clergy is not to be without either leadership or ministry. The gifts of the Spirit to us include both. For us, calls to particular ministries are usually for a limited period of time, and those gifts pertain to the task rather than the person. In one lifetime a person may be called to a number of ministries.”^[8]

Quaker concepts of leadership are rooted in being spirit-led, thus its purpose is to serve rather than direct attention on a person as leader. Robert Greenleaf developed the notion of ‘servant-leadership’ – a process that seeks to serve the highest needs of the group or task. Individuals are appointed to roles where “The meeting has given you a measure of authority which includes an expectation and an acceptance of leadership and firm guidance.”^[9]

“The authority of our meetings is the power of God”....*Paul Lacey*
Pendle Hill Pamphlet 365

Some challenges

- We think some Quakers find it difficult to discuss leadership as it is a notion which people may be in reaction against, based on previous experience of leadership as top-down, hierarchical, the cult of the individual or domination

⁶ For a fuller discussion see, for example, Eccles Peter (2009) *The Presence in the Midst* Swarthmore Lecture, Quaker Books, London

⁷ E.g. www.co-intelligence.org/ and www.collectivewisdominitiative.org/CenteredOnTheEdge/home.htm

⁸ *Q&P* 12.02

⁹ *Q&P* 3.13

- Leadership may be confused with power, and the use of power as ‘power over’ others
- Leadership may be equated with someone putting themselves forward – tall poppy syndrome.^[10] This is very bruising when someone fulfilling a role or task given to them finds themselves criticised, attacked or cut down because their exercise of this authority is deemed to be putting themselves above others
- Larrabee identifies “spiritual entitlement”: Quakers respect that the spiritual authority of the individual and the group as derived from the Light within. However, this may be misused if an individual claiming the priority of their authority or power on any matter frustrates the leadership of the community as a whole or those appointed to leadership roles^[11]

Some opportunities

- Leadership is of pivotal importance in an organisation. We need fresh models of leadership in the world. As our inquiry drew towards its close we were increasingly conscious of the importance of leadership
- There is an opportunity to share models of leadership developed and practised amongst Quakers based on different values
- We have noted at QSA that leadership as partnership, that is distributed and facilitative, encourages and enables a leadership that can be upheld collectively within a group. At the same time clear structures can be in place to provide accountability and effective performance
- A gift of Quakers’ experience of leadership is a founding belief that everyone has a ‘measure of the Light’ thus each holds part of the wisdom. Spirit may be expressed through any individual and speaks to the collective discernment of a group. Leadership is combined with shared responsibility and less likely to be disowned by those feeling alienated, marginalised or disengaging from the perceived leadership roles
- Alternative models of leadership are emerging from contemporary systems and management thinking.^[12] This opens opportunities for Quakers to engage in dialogue with other practitioners, as, for example, the interaction between Quakers and the Occupy Movement

Good
process

III. GOOD PROCESS

Seed thought

“Our method of conducting our meetings for church affairs is an experience which has been tested over three hundred years. In days

¹⁰ Resistance or criticism of Quakers assigned authority in a role can be a reaction against the exercise of authority than their shortcomings in carrying out the role. See also Grundy, Martha (1999) *Tall Poppies: Supporting Gifts of Ministry and Eldering in the Monthly Meeting*, Pendle Hill Pamphlet 347, Pendle Hill Publications, Pendle Hill, Wallingford, Pennsylvania

¹¹ Larrabee, Arthur (2007) *Leadership and Authority in the Religious Society of Friends*, Walton Lecture, Southeastern Yearly Meeting, Florida

¹² Examples of alternative models of collaborative leadership and decision-making include Participatory Budgeting, Future Search, Open Space, World Cafe, Deliberative Councils, Citizens Juries.

of hot contest and bitter controversy the early Friends, knit together by the glorious experience of the Holy Spirit's guidance in all their affairs, came into the simple understanding of how their corporate decisions should be made.

We have learned to eschew lobbying and not to set great store by rhetoric or clever argument. The mere gaining of debating points is found to be unhelpful and alien to the spirit of worship which should govern the rightly ordered meeting. Instead of rising hastily to reply to another, it is better to give time for what has been said to make its own appeal. We must always be ready to give serious, unhurried and truly sympathetic consideration to proposals brought forward from whatever part of the meeting. We should neither be hindered from making experiments by fear or undue caution, nor prompted by novel suggestions to ill-considered courses.”^[13]

Quaker business methods are framed in ‘Quaker discipline’ - a set of norms and customs that embed behaviours and attitudes developed over centuries and arising out of early Quakers’ experience of God. Quaker discipline demonstrates many aspects of what is now recognised as good meeting process. At its best, it makes possible a shared aim, shared responsibility and inclusiveness. It is non-judgmental and non-hierarchical. Listening and the search for a creative way forward facilitate the management of a range of views. Everyone feels heard, valued and respected and there is a committed search for truth. Contemporary management theory suggests that these are essential preconditions for ‘emergence’ that may be likened to a sense of the meeting where experience teaches us that new solutions may arise from the disciplined practice of a search for unity.

Some challenges

- At our inquiry session at Woodbrooke, we heard that Quaker business meetings may become dry and inflexible when Quaker discipline is followed in the letter rather than the spirit
- We also heard that Quaker business meetings may lack life and vitality.
- Our discussions with other Quaker organisations confirmed that our meetings do not always practise good process. As a result decision-making ranges from inadequate to confused
- It is not appreciated that effective use of Quaker business methods requires good process and those new to Quaker business methods may find the discipline hard to understand

Some opportunities

- All meetings need good process to make sound, balanced decisions. Used skilfully and with good processes, Quaker business methods work well.
- At one of our inquiry sessions we were inspired by an account of how non-Quakers are successfully brought into a governing body and learn about Quaker business methods

¹³ *Q&P* 3.04

- As a framework for meeting behaviour Quaker discipline might be written down so it can be understood free of Quaker terminology.^[14] QSA trustees are considering writing their own user-guide to help future non-Quaker trustees understand and appreciate the strengths of Quaker business methods
- Out of this experience grows a realisation that there is something at work that is more than simply us. This can lead to better understanding of early Quakers' understanding of the will of God
- There is a wealth of wisdom, among Quakers and more widely, that draws on common themes so the main tenets of good process are known and accepted

Culture

IV. CULTURE

Seed thought

Earlier we said this report is about the 'inner-side' of trusteeship. This includes both getting inside what is happening when Quaker business methods are being employed and the behaviours and ways of being it generates. If Quaker business methods are as influential as we observed from our inquiry, then it is more than simply a method but sets a cultural agenda, a transmission of values and principles. This may be perceived as a 'meme'^[15], a living embodiment of a quintessential mesh of Quaker values, ways and spirituality. Through this mesh, tested over time, we have learned ways to work together in our human organisations and create true community. Moreover, such a community can live with boundaries that can stretch. In QSA's case, our organisational community can embrace not just trustees, staff and volunteers but anyone who comes to us in need of the services that QSA delivers.

Some challenges

- In general, every organisation is a unique living system and therefore generates its own culture. Amongst Quaker organisations, we assume the common framework – Quaker business methods – but it is not clear if this is stretched or adapted by the varieties of Quaker organisations and communities
- When an organisational culture is generated by, or rooted in, Quaker business methods, we don't know how far its actual practice can adapt the methodology before it loses its quintessential Quaker nature. This matters if people think a diluted version of Quaker business methods is still Quaker in nature. Therefore Quakers need to be clear about which are irreducible elements for it to retain its character

¹⁴ See Leonard Joy *Collective Intelligence and Quaker Practice* at www.co-intelligence.org/P-QuakerCI.html (Accessed November 2012) and Eugene Friends Newsletter at www.co-intelligence.org/P-Quakerbusiness.html (Accessed November 2012)

¹⁵ *Meme* - a set of ideas, values, ways and norms that characterise a culture and its replication

- A pivotal point in our inquiry was our session with staff during which it became apparent to all there was a set of values, ways and practices that we described in different language but which were the same and expressed the Quaker values, ways and practices trustees had identified at the heart of our governance. We likened this to our organisational culture but we do not know whether this is valid for other organisations

Some opportunities

- Historically, early Quaker businesses, such as Cadbury, Rowntree, Pease and others manifested Quaker values, compassionate and inclusive principles in what would still be respected as a radical business culture
- A culture recognizes the 'being' of an organisation as a dynamic whole which embraces all its parts and is expressed through them yet is not reducible to them. This is a holistic and dynamic model
- Exploring the relationship between Quaker business methods and organisational culture helps identify the interplay of relationships or elements that create resilience in a system. This makes it all the more important to be able to pick out key elements in the overall process
- During our inquiry we came to see the close correlation between QSA's organisational culture, the components parts of our Quaker identity and QSA's ways of behaving that have so strongly impacted its profile and reputation in the charity world

As our inquiry ends, we move forward with greater clarity and confidence in our Quaker identity. Trustees and staff recognise our shared understanding of the values, ways and practices on which this is based and the ways we describe and apply it. We have conscientious and dedicated trustees and staff working for the good of complex and dynamic charity, prepared to break new ground, retaining our flexibility to be responsive and identify new ways to addressing people's needs that arise from living on a low income in east London.

In answering our starting questions we encountered new ideas. Amongst those we would like to continue exploring are: deepening understanding of the inner-side of trusteeship; central Quaker threads we consistently identified – being spirit-led, leadership, good process and culture; how we can know when we are spirit-led; how we make more skilful use of spirit-led decision-making; reflecting on the quality of our decisions; the many dimensions of a Quaker model of leadership; ensuring wise use of Quaker business methods as both spirit-led and a management process capable of carrying us through the most challenging decisions to strengthen the practical impact QSA's work.

As we look forward to the future we appreciate the contributions which made our inquiry possible and so fruitful. We hope, in return, our inquiry helps Quakers nurture a vibrant community that in its way continues to be as influential in civic society as earlier generations of Quakers were in theirs.

QSA

Quaker Social Action

Quaker Social Action exists to resource, enable and equip people living on a low income in east London. Our projects work towards our vision of 'a just world where people put people first', recognising the people we work with as agents of change not objects of charity.

We work to tackle social exclusion, seeing poverty as not just material but also social. Our work is practical, relating to the everyday needs of the people we work with to make a tangible difference to their lives.

We put people at the centre of what we do, striving to find practical and creative solutions to the problems which affect people living on a low income. We listen to and respond to the needs of the community, by running practical, sustainable and collaborative projects. We share our work with others when it is clear that it has the potential to bring benefits to communities outside of our own.

Quaker Social Action was established in 1867 as an association of different charitable projects addressing the needs of the poor in London's east End. It is an independent charity (no. 1069157) and Quaker Social Action's commitment to address social exclusion arises from Quaker principles of justice, simplicity, truth, equality and peace.

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