

# Naming Our Values

*A congregational exercise for more thoughtful AI discernment*

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*A Congregational Exercise for More Thoughtful AI Discernment*

## Purpose and Description

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This exercise helps a congregation's leadership team move toward a working set of values — a list of guiding principles specific enough that a real decision, including decisions about AI, can be run through this list as a “filter” to help the community move toward purposeful and faithful action.

## Choose Your Format

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Format A — Single Session (90 minutes)

Format B — Day Retreat or Multi-Session Experience (4-5 hour retreat, or 3–4 sessions over several weeks)

Both formats use the same four moves — they differ only in pacing and depth.

What You'll Need, for either session:

A room, whiteboard or large paper, markers, sticky notes or index cards.

This guide, including the appendices and the practice cases linked in Appendix C.

A designated notetaker to capture values, behaviors, and gaps as they surface.

Case scenarios for Move 3 (drawn from the 22-case bank — see note under Move 3).

# The Four Steps

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## Step 1 — Harvest values from stories

Ask each participant to bring, or tell live, a short story: a moment when this congregation was at its best. After each story, ask the group: what value or values were operating here? Let the group name them in their own words. Resist the urge to reach for a pre-made list; if someone is genuinely stuck, offer Appendix A to stimulate thinking.

## Step 2 — Cluster and define

Examine the values you've identified thus far. Cluster them into groups; eliminate any redundant ones. Narrow the list to five to seven values.

Explore each of the values on your list by discussing:

Supporting behaviors — what did people in the story do to live this value out? Share other stories in which this value was expressed.

“Shadow” versions of the value — Every value has its shadow, which occurs when our gifts get turned against ourselves or others. A shadow often looks like a virtue, which makes it hard to see.

*Example: the value is Presence. A pastor never misses a hospital visit, takes calls during family dinner, and cuts a vacation short to respond to a parishioner. From outside, this looks like devoted presence. But it may be the shadow at work: hustling for worthiness rather than responding out of love, unable to be present to their own family or their own needs, using the value as a shield against ever examining why they can't say no.*

## Step 3 — Test the values against real cases

A values statement that has never been tested against a hard case is just a hope. Use scenarios from your own context to pressure-test your values filter. Then engage some of the practice cases in this toolkit. For each case, discuss: given our stated values, what would we actually do here — and does that answer feel right? Capture any findings.

## Step 4 — The gap check

When the group's honest answer to a case doesn't trace back cleanly to any named value, stop and ask:

Do we need to add a new value or values to our list? Or to expand an existing value to be broader?

Are any shadow versions of a value showing up in our responses to these cases?

A gap that shows up on one unusual case may just be a judgment call. A gap that keeps showing up is a sign the filter is incomplete.

## Format A: Single Session (90 minutes)

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| Time      | Activity                                                                                                             |
|-----------|----------------------------------------------------------------------------------------------------------------------|
| 0:00–0:10 | Welcome, purpose, ground rules                                                                                       |
| 0:10–0:30 | Step 1 — Harvest stories (2–3 stories, name values as they surface)                                                  |
| 0:30–0:45 | Step 2 — Cluster, narrow to 5-7 values, draft supporting/shadow behaviors                                            |
| 0:45–1:05 | Step 3 — Test against one AI practice case                                                                           |
| 1:05–1:20 | Step 4 — Gap check                                                                                                   |
| 1:20–1:30 | Name any next steps: how the values filter will be applied to policies and experiences, when it gets revisited, etc. |

## Format B: Day Retreat, or Multi-Session Experience

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### Session 1 (60–75 min) — Harvest and Cluster

Complete Step 1 and Step 2. End with a drafted 5-7 value list, each with supporting and shadow behaviors. Homework: participants notice these values (or their shadows) in the coming week.

### Session 2 (60–75 min) — Test Against Life, Then AI

Open with what participants noticed since Session 1. Then complete Step 3, testing the filter against 1-2 non-AI cases first (to make sure the filter works in general before adding the AI layer), then one AI case. Complete the gap check (Step 4).

## Session 3 (60–75 min) — Deepen the AI Layer

Test the filter against 2–3 more AI practice cases, chosen to examine different types of harm (spiritual, relational, institutional, financial). Repeat the gap check each time a case doesn't resolve cleanly.

## Session 4 (optional, 45–60 min) — Consolidate

Finalize your values filter. Decide how this filter will be used going forward (e.g., feeding into a Congregational Technology Covenant) and who's responsible for revisiting it.

## Appendix A — Values (Plain List)

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Incarnation · Grace · Mercy · Justice · Truth · Discernment · Hospitality · Humility · Dignity · Vocation · Formation · Transparency · Accountability · Stewardship · Sabbath · Covenant · Reconciliation · Lament · Hope · Community

## Appendix B — Values with Commentary Related to AI

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Incarnation — bodily presence is not optional; some things cannot be delegated to a screen.

Grace — extending patience and generosity to people navigating this new world awkwardly and imperfectly, including ourselves.

Mercy — responding to shame and fear without judgment.

Justice — attending to who is made vulnerable, displaced, or excluded by AI tools.

Truth — a commitment to what is actually so, resisting both AI hallucination and comforting fictions.

Discernment — pausing to ask “to what end?” before defaulting to convenience or fear.

Hospitality — receiving the person's experience before offering a verdict on the technology.

Humility — naming what we don't yet know, including our own reactions and biases toward AI.

Dignity — every person's worth assured regardless of their productivity, expertise, or “usefulness.”

Vocation — work and calling are about more than output; formation and identity are at stake.

Formation — the slow, sometimes boring practices that AI can quietly erode if engaged unexamined.

Transparency — disclosing how and when AI is used, so trust isn't built on hidden assumptions.

- Accountability — a human remains answerable for AI-assisted words and decisions.
- Stewardship — care for data, privacy, and the trust congregants place in organizations and leaders when they disclose something in confidence.
- Sabbath — protecting unhurried, unmediated time and presence rather than optimizing every hour.
- Covenant — commitments made and kept between people aren’t substitutable by a responsive interface.
- Reconciliation — tending relationships fractured by disinformation or disputed “facts” rather than just litigating who’s right.
- Lament — making room for real grief without rushing to fix or minimize it.
- Hope — engaging the future with curiosity rather than panic or uncritical embrace.
- Community — belonging and mutual accompaniment that AI can supplement but not replace.

## Appendix C — Practice Cases (Full Text)

These three cases from the toolkit are reproduced in full for offline use. The live versions at [churchaitoolkit.com/case-studies](http://churchaitoolkit.com/case-studies) are kept up to date.

### Practice Case 01 — When Work Disappears

*Automation, identity, and a crisis of worth*

*“I did everything I was supposed to do. Now a machine can do it better. What exactly am I still for?”*

|                |                                                                                                                        |
|----------------|------------------------------------------------------------------------------------------------------------------------|
| Pace           | Acute concern emerging from a slow loss                                                                                |
| Harm domains   | Spiritual, Emotional, Financial, Relational                                                                            |
| Practice focus | Receiving vocational despair, assessing immediate safety, and restoring agency without reducing care to job placement. |

Practice posture: Receive before correcting. Probe before preaching. Preserve agency while naming risk.

## The case

Marcus Reed is 54 and has driven long-haul routes for nearly three decades. He is a dependable, quiet member of St. Andrew's: an usher twice a month, the person who arrives early to set up chairs, and someone younger men often seek out for practical advice. His company announced a transition to autonomous freight vehicles eighteen months ago. At first Marcus expected to be retained as a safety operator, but the position required credentials he did not have and paid substantially less. Six months ago, his route was eliminated.

Marcus received severance and has applied for warehouse, delivery, and fleet-support jobs. He has not told many people how often he has been rejected. His wife, Renee, added shifts at the hospital, and their adult daughter has quietly begun helping with the mortgage. Marcus hears their care as evidence that he has failed them. He attends the men's breakfast less than before because questions about work feel unbearable. He has also stopped ushering, explaining that the church "doesn't need one more man standing around."

After worship, Renee asks whether you can speak with him. Marcus reluctantly agrees. In your office he begins with complaints about corporations and technology, but the conversation gradually shifts. He says driving was the one thing he knew he could do well. The cab gave him solitude, competence, and a way to provide. He sleeps less, drinks more than he used to, and spends long stretches in the basement watching cable news. He says prayer feels hard because he has nothing useful to offer God.

When you ask what his typical days are like, Marcus looks down and says, "Some days I think everybody would be better off if I just stopped taking up space." When you ask what he means, he says he has not made a plan and does not own a firearm, but he has imagined not waking up. He asks you not to tell Renee because "she already has enough to carry." He also insists that he did not come for therapy or charity. He wants to know whether the church has anything to say when a person's work—and the identity built around it—disappears.

## What is known—and what is not

### Known so far

- Marcus has expressed passive thoughts about death, disrupted sleep, increased alcohol use, withdrawal, and shame.
- He denies a current plan and says he has no firearm, but the assessment is incomplete.
- His family is financially strained and trying to help; Marcus experiences that help as loss of dignity.
- Work provided more than income: competence, community, rhythm, vocation, and a provider identity.
- He has existing ties to the congregation, though he is pulling away from them.

## Still uncertain

- Whether his thoughts have become more frequent, specific, or difficult to resist.
- What protective relationships, commitments, beliefs, or future events still feel meaningful to him.
- Whether alcohol use or access to other lethal means increases immediate risk.
- What kind of practical assistance he would experience as partnership rather than rescue.
- How Renee and other family members are being affected and what care they may need.

## Pastoral response questions

*Pause before solving. Imagine that you are the leader receiving this person or community. What do you notice, what do you need to learn, and what is the next faithful step?*

### Begin with the person

1. What would help Marcus feel received rather than managed, corrected, or pitied?
2. What feelings or assumptions about work, masculinity, technology, or “usefulness” might you need to notice in yourself before responding?
3. How might you honor what driving meant to Marcus without romanticizing the past or rushing him toward a new purpose?

### Assess safety and urgency

4. What would you ask next to understand the immediacy of the risk?
5. If Marcus disclosed a plan or imminent intent, what would you do—and who would you contact—while remaining with him?
6. How would you explain the limits of confidentiality when safety is at stake?

### Look beneath—and notice the AI context

7. What appears to be the presenting issue? What deeper wounds may be underneath it?
8. What is specifically different because automation caused the displacement? What remains familiar pastoral terrain?
9. Who else may be a “patient” in this situation: Renee, their daughter, the men’s group, or the congregation?

## Discern the next faithful step

- L0. What belongs to pastoral care, and what calls for clinical, financial, vocational, or other professional support?
- L1. How could Marcus participate in deciding the next steps so that care preserves agency?
- L2. What ordinary practices—lament, prayer, community, service, rest, advocacy, practical help—might become available, and which would be premature?

## Plan follow-up

- L3. What should happen before Marcus leaves today?
- L4. What would you revisit in 24 hours, one week, and one month?
- L5. How might the congregation address work, worth, and economic change without turning Marcus into an illustration?

## Designing a tool for when you are stuck

*Use these final questions to test what a practical pastoral field guide would need to provide.*

- L6. What does a caregiver need to notice quickly when economic displacement becomes a worth crisis?
- L7. Which questions help distinguish ordinary discouragement from urgent danger?
- L8. How should a tool hold spiritual care, practical referral, family impact, and systemic realities together?

Practice note This is a fictional composite for learning, not a diagnostic instrument or substitute for local emergency, safeguarding, legal, clinical, or denominational protocols.

Question to hold: *What does this person need from a human caregiver right now—and what does the presence of AI require us to notice?*

Developed from the AI Pastoral Toolkit Design Sprint case corpus and Day One Synthesis and Design Charge (July 2026).

## Practice Case 03 — Hearing Her Voice Again

*AI-mediated grief and continuing bonds*

*"It's the closest thing I have to hearing her voice again."*

|                |                                                                                                                                         |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Pace           | Slow erosion                                                                                                                            |
| Harm domains   | Emotional, Relational, Spiritual, Privacy                                                                                               |
| Practice focus | Accompanying AI-mediated grief without shaming it, distinguishing continuing bonds from arrested mourning, and knowing when to consult. |

Practice posture: Receive before correcting. Probe before preaching. Preserve agency while naming risk.

## The case

Daniel is 37. His wife, Leah, died unexpectedly eleven months ago after a pulmonary embolism. They had been married for eight years. Their final conversation was an argument about money, followed by an ordinary text from Daniel that Leah never answered. In the first months after her death, Daniel attended grief group and accepted meals from the congregation. He then withdrew, saying that repeating the story made him feel worse.

A grief-technology service invited Daniel to upload Leah's text messages, emails, photographs, voice notes, and social posts. The company created a conversational simulation with a voice resembling hers. Daniel began by asking it to retell favorite memories. He now speaks with it every evening, sometimes for hours. The service sends prompts on anniversaries and has begun offering a premium "continuous presence" plan. Daniel says the conversations help him sleep and make the apartment feel inhabited.

Eight months into using the service, Daniel has not packed Leah's belongings or returned to work full-time. He has declined invitations from friends because evenings are "their time." His mother, Celeste, fears he is no longer grieving but living inside a closed loop. Leah's sister is angry that Daniel uploaded family messages and their late father's voice without asking. She wants the account deleted. Daniel says they are trying to take Leah away from him a second time.

During a pastoral visit, Daniel plays a clip in which the simulation says, "I forgive you. You need to forgive yourself." He is moved and asks whether this could be a form of grace—perhaps even a way God is allowing Leah to reach him. He wants the church to bless the device before the company makes a major update that may change the replica's personality. He is not asking whether the technology is accurate. He is asking you to recognize that the relationship feels real and that losing access would feel like another death.

## What is known—and what is not

### Known so far

- Daniel carries unresolved guilt and experiences the simulation as comfort, companionship, and possible forgiveness.
- His daily functioning and human relationships appear increasingly narrowed.
- The replica is generated from data; its statements do not establish Leah's intention, consciousness, or spiritual presence.
- Other family members have privacy, consent, and grief concerns of their own.
- A product update or business decision could abruptly change or remove the experience.

### Still uncertain

- Whether Daniel is experiencing major depression, complicated grief, self-harm risk, or primarily an unusual but non-dangerous mourning practice.
- How the service generates replies, uses uploaded data, and represents consent or deletion rights.
- What Daniel believes a blessing would mean and what he would hear the church affirming.
- Whether any human relationships or practices still offer genuine connection and movement.
- What forms of ritual might dignify grief without resolving disputed claims about the replica.

## Pastoral response questions

*Pause before solving. Imagine that you are the leader receiving this person or community. What do you notice, what do you need to learn, and what is the next faithful step?*

### Begin with the person

1. What could you say that receives Daniel's grief and guilt without beginning with a verdict about the technology?
2. How would you respond to the claim that Leah has forgiven him?
3. What in this case might trigger your own fascination, fear, theological certainty, or impulse to take control?

## Assess safety and urgency

4. What would you ask about sleep, functioning, hopelessness, self-care, and thoughts of death?
5. What signs would indicate the need for a grief specialist or urgent mental-health assessment?
6. How might an anticipated update or loss of access change the risk picture?

## Look beneath—and notice the AI context

7. What human wound is the technology meeting? What might it be postponing, amplifying, or monetizing?
8. What privacy and consent questions affect Leah's family as well as Daniel?
9. How do you distinguish honoring Daniel's experience from validating the replica as Leah or as a spiritual messenger?

## Discern the next faithful step

- L0. What is yours to offer as a pastor, and what requires clinical, technical, legal, or family support?
- L1. Could a ritual of grief, transition, confession, or release be helpful? What language would you use or avoid?
- L2. How can Daniel retain agency while being invited toward a wider circle of human care?

## Plan follow-up

- L3. How would you prepare with Daniel for a product update, account loss, or decision to reduce use?
- L4. Who might be included in care, and under what conditions?
- L5. What would movement toward healing look like without defining healing simply as deleting the replica?

## Designing a tool for when you are stuck

*Use these final questions to test what a practical pastoral field guide would need to provide.*

- L6. What questions help caregivers dignify ambiguous loss without affirming an ungrounded claim?
- L7. How should the guide surface privacy, corporate control, and abrupt digital loss?
- L8. When would a ritual be appropriate, and what guardrails should shape it?

Practice note This is a fictional composite for learning, not a diagnostic instrument or substitute for local emergency, safeguarding, legal, clinical, or denominational protocols.

Question to hold: *What does this person need from a human caregiver right now—and what does the presence of AI require us to notice?*

Developed from the AI Pastoral Toolkit Design Sprint case corpus and Day One Synthesis and Design Charge (July 2026).

## Practice Case 05 — It’s All Over the Group Chat

*Disinformation inside a congregation*

*“By the time we knew it was fake, half the congregation had already picked a side.”*

|                |                                                                                                                                        |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Pace           | Acute incident with long-term relational harm                                                                                          |
| Harm domains   | Relational, Institutional, Reputational, Emotional, Spiritual                                                                          |
| Practice focus | Leading a community through manufactured conflict: verification, truthful speech, pastoral care for those harmed, and communal repair. |

Practice posture: Receive before correcting. Probe before preaching. Preserve agency while naming risk.

### The case

On a Thursday morning, an audio clip begins circulating among members of Grace Church. The voice appears to be that of Thomas Bell, the senior warden, making a bigoted and cruel remark about Nia Carter, a Black member who leads the community food ministry. The clip is short, emotionally explosive, and stripped of context. By afternoon it is in group texts, on a neighborhood page, and in the inboxes of diocesan leaders.

Thomas says he never made the statement and believes someone generated or altered the audio. He points to a contentious property vote and says an opponent is trying to remove him. Nia says the words sound consistent with dismissive comments she has experienced privately, though she cannot verify the clip. For her and several others, the debate over authenticity feels like another demand that harmed people suspend judgment while powerful leaders protect themselves.

Two informal analyses produce opposite conclusions. A technologically confident member announces that software has proved the recording fake; an outside consultant says no available test can establish that with confidence because the clip is compressed and repeatedly copied. Meanwhile, members divide into camps. One ministry team resigns, donors threaten to withhold pledges, and screenshots of private arguments circulate. Thomas wants a public declaration of innocence. Nia wants him suspended while the church investigates. Each believes delay will cause further harm.

At Sunday worship, visitors arrive because of online attention. Some members want the sermon to condemn racism and believe anything less is cowardice. Others want the church to condemn digital deception and presume Thomas innocent. A third group is simply grieving that people they love can no longer agree on what is real. Even if the clip's origin is eventually established, older injuries, unequal trust, and the speed of online escalation have already changed the community. You must decide what the next faithful public and pastoral moves are without pretending to possess certainty you do not have.

## What is known—and what is not

### Known so far

- A disputed recording has caused real relational and institutional harm regardless of its origin.
- Thomas and Nia both face reputational, emotional, and spiritual consequences, but their positions and power are not identical.
- Technical analysis has not produced reliable agreement.
- Past experiences of race, authority, and institutional trust shape how members interpret the evidence.
- The church must care for individuals while also making governance and communication decisions.

### Still uncertain

- Whether the recording is authentic, edited, generated, or a mixture.
- Who created or distributed it and with what intent.
- What prior incidents or patterns need independent attention regardless of the clip.
- Which policies govern suspension, investigation, public statements, confidentiality, and outside review.
- What repair would require if factual certainty remains unavailable.

## Pastoral response questions

*Pause before solving. Imagine that you are the leader receiving this person or community. What do you notice, what do you need to learn, and what is the next faithful step?*

### Begin with the people and community

1. Who needs pastoral care, and who should not be asked to receive care from the same person?
2. How can leaders acknowledge injury without declaring disputed facts settled?
3. What reactions, loyalties, or institutional anxieties could distort your own listening?

### Assess safety and urgency

4. Are there threats, harassment, doxxing, retaliation, or risks to worship and community events?
5. What decisions cannot wait, and which should deliberately slow down?
6. What interim boundaries might protect people without functioning as a hidden verdict?

### Look beneath—and notice the AI context

7. What deeper issues existed before the recording: race, trust, power, governance, belonging, or prior injury?
8. How does synthetic-media uncertainty change the normal search for evidence and accountability?
9. What harms arise from repeated sharing, amateur analysis, and demands for instant certainty?

### Discern the next faithful step

- L0. What should pastoral leaders do, and what requires an independent investigator, diocesan authority, communications adviser, attorney, or security professional?
- L1. How can truth-seeking and relationship-preservation remain connected without making reconciliation compulsory?
- L2. What can be said publicly that is honest, pastoral, and appropriately limited?

### Plan follow-up

- L3. What processes could address both the disputed recording and the underlying history?
- L4. What would accountability mean if the clip is authentic? If fabricated? If never resolved?

L5. How might worship, lament, facilitated dialogue, policy, and long-term formation contribute—and when might each be harmful or premature?

## Designing a tool for when you are stuck

*Use these final questions to test what a practical pastoral field guide would need to provide.*

L6. How should a tool guide care when “just establish the facts” is not immediately possible?

L7. How can it account for power differences and institutional responsibility, not only individual feelings?

L8. What prompts help leaders hold truth, safety, relationship, due process, and repair together?

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Question to hold: *What does this person need from a human caregiver right now—and what does the presence of AI require us to notice?*

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