

Using Appreciative Inquiry (AI) for planning ODL An Experiential Workshop

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ABSTRACT

In situations of social conflict and organisational change, institutions frequently undertake planning initiatives to address the challenges they face. Appreciative Inquiry (AI) is a valuable tool for initiating positive change and encouraging implementation of the results.

Appreciative Inquiry (AI) is one of the best kept secret in strategic planning. The system was developed by David Cooperrider and Suresh Srivastva at CASE Western Reserve University's Weatherhead School of Management in 1987. Since that time, it has become a major revolutionary tool in planning institutional change in education, the private sector and NGOs. Through its positive approaches to planning, participants involved in AI workshops collaborate in identifying planning solutions that are practical and engaging in a positive and constructive way.

This workshop will demonstrate the AI methodology. In the latter part of the workshop, participants will be able to explore opportunities for using the AI methodology to generate "buy-in" and active commitment to strategies necessary to implement ODL successfully in an institutional environment. Since this planning strategy is participatory, those choosing to participate in it at the conference will be required to do some preliminary preparation.

THE APPRECIATIVE INQUIRY (AI) PHILOSOPHY

Described in the Case Western Reserve Weatherhead School of Management's Appreciative Inquiry Portal (<http://www.appreciativeinquiry.case.edu>) as "a discipline of positive change," AI is indeed an affirmative approach to institutional change, whatever the size of the organisation. David Cooperrider, (2008) the originator of the AI approach, observed in an article (<http://appreciativeinquiry.case.edu/learning/whatsNewDetail.cfm?coid=11874>),

Appreciative Inquiry has two radical but exciting premises: ...organizations are not problems-to-be-solved... all the deficit-based change methods are, in fact creating an exhausting treadmill and barrier to real innovation. Appreciative Inquiry turns the problem-solving habits of the field on their head, and shows that change is more powerful, energizing, and effective when we inquire into the true, the good, the better and the possible.

B. & M. Tschannen-Moran (2005) observe,
...conversations and interactions become positive the instant we ask a positive question, tell a positive story, or share a positive reflection. Positive questions and reflections change everything. They are, in many respects, the change we seek to make. They don't just begin a process that leads to a positive future; they simultaneously create a positive present by shifting our conversations and interactions in a positive direction. They are not just a prelude to change; they are change... Such questions blend continuity and novelty in order to evoke transformational change at the speed of imagination.

The enthusiasm apparent in writers and researchers who discuss AI theory and practice indicates the level of commitment AI practitioners and researchers share.

Turning the traditional SWOT (Strengths, Weaknesses, Opportunities and Threats) and the organisation-as-a-problem-to-be-solved, "ain't it awful?" planning approach inside out, AI focuses on illuminating and sharing what individuals perceive as the "best" in an organisation, and then

builds on these strengths to address its future directions and actions. The inverse assumption to “ain’t it awful?” in AI is that every organisation has strengths and achievements to celebrate, and recognising and talking about those achievements can begin a new, positive conversation on which to construct the future. One doesn’t have to tear down an organisation or project or institution to build it back up; one can build on what already exists.

Since AI originated in a graduate School of Management, initially AI had an academic business-oriented research focus as a primary intent: extensive preliminary research among target groups (the Discovery phase); carefully-crafted and documented Dreams emerging from the visioning process, and assiduously-documented Design and Destiny stages.

However, with the rapid dissemination of the AI approach in a variety of institutions that could hardly be considered academic or research oriented, the rigorous documentation has given way to on-the-ground adaptations of the model, most of which have report having modified the process but not the positive intent of the AI philosophy.

Who has used this methodology successfully?

As documented on the Appreciative Inquiry Portal, a diversity of organisations small and large, private and public sector, government departments and non-governmental organisations, academic institutions and faith-based organisations have used the methodology successfully to plan and restructure their future directions. The case studies of these organisations are readily available on the AI Portal for review.

A few examples of the diversity and complexity of institutions that have successfully engaged in Appreciative Inquiry include:

- ❑ the United Nations Global Compact Summit (2004), chaired by the UN Secretary-General Kofi Anan, which brought almost 500 leaders of corporate and government sectors together to draft a Global Compact to address development challenges to assist the developing countries and the very poor in them;
- ❑ GTE (now Verison), which brought all levels of the organisation together to plot a major culture change as the way forward for the company, and adopted a storytelling narrative model of cultural change, and
- ❑ The Women’s Empowerment Project in Nepal (Odell, 2005), which confirmed a remarkable 4-fold increase in the number of women with micro enterprises and an 8-fold increase in their gross sales following an AI-based empowerment, literacy, savings, and village banking curriculum among 125,000 women in 6,500 economic groups.

These three illustrations demonstrate the breadth of AI’s positive impact on very disparate groups who have participated in the AI process.

Who can be involved in the AI process?

The simple answer, apparently, is that everyone and anyone can be involved productively in AI initiatives. Indeed, one of the assumptions in the AI approach is that those who complain most loudly about the negative forces in their institutional environment are people who, in their own minds, have a clear vision and constructive ideas about how the institutional operations and their working conditions could be better. Instead of stimulating the recitation of a litany of negative aspects in their institutions, the AI strategy encourages participants to concentrate on positive aspects of their working environment.

All people in an organisation are eligible to participate in developing a vision of the future in an organisation. The greater the number of people in an organisation that are included in the AI process, the greater the number of people who can be committed stakeholders invested in the implementation of the plans that emerge from the AI process.

The democratic philosophy of AI is that information about the strategy and its process – stories and articles about the use of and research on AI in a variety of contexts - be shared widely and

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freely through the AI Portal on the Appreciative Inquiry Commons. This openness reflects a refreshing reversal of the traditional academic attitude toward new knowledge that insists on restricting access to it.

Those attending PCF5 who will be able to benefit most from this workshop are those responsible for community development organisations, those who are planning new ODL projects, those who are currently managing ODL projects, and those who are looking for a useful evaluation strategy at the conclusion of ODL projects.

THE FOCUS OF THE WORKSHOP

COL has requested that the AI workshop address the topic, “The Commonwealth of Learning: areas of interest and ODL initiatives in 2014.” Participants in the AI workshop will be able to make a positive contribution to COL’s next five-year planning cycle.

STRUCTURE OF THE WORKSHOP

The three-hour workshop will engage participants in the four stages of AI: Discovery, Dream, Design and Destiny in order for them to experience the impact of using the AI approach for planning. Working in heterogeneous groups formed at the beginning of the workshop, participants will use the collaborative strategies of the UNICEF-developed Visualisation in Participatory Processes (http://www.southbound.com.my/Vipp/Vipp_AboutVipp_WatlsVIPP.htm) in combination with AI structure to work through each of the four stages of AI. At the conclusion of the workshop, participants will be invited to reflect on the process they experienced and where they think the methodology can be usefully employed in their respective settings.

An AI workshop usually lasts for at least one day; sometimes, as is evident in some of the case studies on the AI Portal, AI initiatives can last for several months or even years. In this three-hour workshop, it will in all likelihood be impossible to complete any of the four AI stages in depth; however, participants will obtain a flavour of the AI and VIPP processes.

Participant introductions

At the beginning of the workshop, participants will introduce themselves through their experience in or their connection with COL’s programmes, and their substantive positions in their respective workplaces. Using this information, participants will form themselves into groups according to identified criteria provided by the Facilitator. This exercise is scheduled to take 15 minutes.

Discovery

The Discovery phase of the workshop employs story-telling as a means of encouraging participants to focus on positive aspects of the organisation or subject of the planning initiative. Participants are asked to identify their best or proudest moments or experience in ODL as tutors, learners or managers. In their working groups, participants will share with the other members their proudest experience in circumstances where they were using or employing ODL methodologies. When all members have shared a story, the group will reach consensus on the story that best reflects the pride that all members have experienced in an ODL setting. The members will then develop a group drawing representative of the experience and nominate one member as the rapporteur to share the story with the plenary. The Discovery stories will be mounted on the wall. This exercise takes 35 minutes.

Dream

The Dream phase of the workshop engages the small groups in looking into the future to project how ODL will look and operate in ten years’ time. There are no restrictions on the dreams: Participants are encouraged to “dream big,” and not limit themselves in their visions of the ODL future: in this dream, there is an abundance of everything they need to make their dream reality: trained personnel, equipment, infrastructure, positive recruitment systems for engaging skilled staff, institutional and/or governmental support, procurement systems for acquiring cutting-edge

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technology and financial resources. After developing their dream, each group will be invited to draw a representation of their ODL future and present this dream to the plenary. The future projections will be mounted on the wall. This exercise takes 35 minutes.

Design

The Design phase of the workshop challenges the respective groups to develop a plan for moving toward an agreed aspect of their ODL Dream and identify a possible role for COL in supporting that plan over the next five years. In reality, of course, all aspects of the dream would need to be developed to ensure achievement of the dream; however, because of the time constraints in the workshop, groups will focus on one strand of their dream and work that through in detail. The groups are to identify the people, processes, infrastructure and financial support necessary to move toward their dream. Each group will share its design with the plenary and respond to questions about its design. This exercise takes 40 minutes.

Destiny

The Destiny phase of the workshop engages the groups in identifying the means of supporting the design they have developed in order to make it sustainable. Each group will present the progress it has made on its sustainability plan to the plenary and answer questions on their strategies. This exercise takes 40 minutes.

Reflection

Following these activities, participants will reflect on their experience of the methodology and its possible use in their own settings. This exercise takes 15 minutes.

THE WORKSHOP FACILITATOR

Dr. George has been using a combination of AI and VIPP, the UNICEF-developed Visualisation in Participatory Programmes, methodologies in strategic planning, project planning, operational planning, evaluation and policy development workshops since 2005. Prior to this time, she had used the VIPP methodology in workshop settings for more than 15 years. The combination of the two participatory approaches stimulates positive solutions and strong participant commitment to outcomes of the planning experience.

MAXIMUM NUMBER OF PARTICIPANTS

The maximum number of participants in the workshop is 25. However, if there is sufficient interest and available space to accommodate a second offering, the Facilitator is willing to repeat the workshop.

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