



Appreciative Inquiry

A Leadership Tool for Invigorating the Association

Solutions are not defined simply by a leader or executive team. Instead, multiple stakeholders are active participants in the process of redefining the association.

Associations face increasing member demands. Members want more services, better education and cutting edge innovations that can be applied in their own organizations. These external demands are not the only pressures that association executives have to deal with. Getting and keeping the right staff is another challenge. Engendering their loyalty to the association and its aims can be difficult. Member and staff stressors can be compounded by decreasing dues revenue and lower participation in conferences and other events. As a result of these pressures, leaders have to find innovative ways to keep the association relevant and viable. In fact, executives are responsible for being transformative leaders.

Appreciative Inquiry is an organizational effectiveness tool that opens limitless opportunities for associations of all



Editor's Note – Joanne Smikle will be sharing her insights on “Improvement, Innovation & Ingenuity: Jump-Starting Spectacular Performance” at CalSAE’s ELEVATE Annual Conference in Newport Beach March 28-30, 2012.

sizes. It provides a collaborative, structured approach for top to bottom transformations. It has the potential to engage staff and members, revitalize interest in the aims of the association and create new options for stakeholders. By way of background, Appreciative Inquiry is a concept developed by David Cooperrider, Ph.D. He was working on his doctoral dissertation at the Cleveland Clinic and came up with this theory of how to maximize organizational effectiveness by examining past successes. Once the successes have been clearly identified, the conditions that led to the successes can then be replicated. The method explores what gives an organization life, what the possibilities are for the organization, how those possibilities can be realized and what the organization will actually become. The evolution of the organization has the potential to create a positive triple bottom line. According to Cooperrider, the triple bottom line is the good that is ultimately done in terms of people, profit and the planet. This is a truncated description of a fascinating topic. Explore the topic in depth by reading *Appreciative Inquiry Handbook: For Leaders of Change*, by David L. Cooperrider et al.

Applying AI to Association Leadership

Cooperrider’s core principles have been adopted and expanded upon by other leadership theorists. Jane Magruder Watkins and Bernard J. Mohr developed *Five Generic Processes*. They hold that these processes are another way to execute change using appreciative principles. They are applicable to the work of associations.¹ If an executive is to use this model to recreate the association, they must commit to a process-oriented approach to organizational development. It should be noted that this is a highly collaborative methodology that draws on the insights and experiences of multiple, varied stakeholders. Association stakeholders can include members, staff, vendors, regulators for the profession the association represents, end-users of member’s products or services, leaders from other associations representing the same or similar constituencies and even legislators whose decisions impact the profession.

Let us begin by outlining the *Five Generic Processes*. We will then move to how each stage of the process can be applied to transform associations. The process follows:

1. Choose the positive as the focus of inquiry.
2. Inquire into stories of life-giving forces.
3. Locate themes and select topics for further inquiry.
4. Create shared images of a preferred future.
5. Find innovative ways to create that future.

Choosing the positive as the focus of inquiry requires a collaborative search for the appropriate frame of initial exploration. While traditional deficit models ask that a problem be defined at the outset of any change initiative, this approach asks that the organization pose positive, fateful questions in the very beginning of the inquiry. These questions are fateful because one of the underlying principles of Appreciative Inquiry is that the language used initially actually serves to shape the inquiry and its outcomes. One of the theoretical underpinnings of Appreciative Inquiry is Social Constructionism which teaches that language is not merely a tool to describe. Rather, it is a tool for creating. If we hold that language is a powerful tool for creating the organization, the questions posed at the beginning of the inquiry are of vital importance. These initial forms of exploration have the potential to shape the future of the inquiry and the association. Possible initial questions that choose the positive as the focus of inquiry include the following:

- When our membership was at peak levels, what conditions existed within our association?
- What do you value most deeply about our association and its outcomes?
- When have you felt completely engaged in and committed to the work of our association?

Once the positive frame of inquiry is selected and questions are posed throughout the association, the inquiry goes deeper into identifying life-giving forces. Small groups are asked to share stories of life-giving, life-affirming work in the association. This phase of the inquiry can be conducted as a workshop, as in-depth structured interviews or as a focus group. No matter what the method is selected, the goal is to delve into the aspects of the association that give it its unique character. The goal is also to mine the successes that have contributed to the organization’s standing. This phase of the process is of the most exciting. Stakeholders share what they believe keeps the association alive. This reveals core values and shared beliefs. It also reveals core principles that define success.

1. Jane Magruder Watkins and Bernard J. Mohr, *Appreciative Inquiry: Change at the Speed of Imagination*, adaptation.



Sharing these stories goes a long way to creating a new language in the association. The language of complaint has no place in appreciative processes. Instead, language focuses on building strengths, commitment and shared comprehension of the association's distinctive identity. The language, conveyed through the initial inquiry and the revelation of life-giving forces, also serves as a launching point for changing processes and practices so that they are aligned with the values stakeholders hold dear.

Themes emerge from these initial explorations. This is the third generic process. These themes have to be grouped and tracked. In a pure application of the model the group does not prioritize its themes. However, experience has shown that this is an important step. When there are multiple themes that all appear compelling, inquiry participants can become overwhelmed. The process guide can reduce these feelings by helping them prioritize their themes. The group determines the most logical starting point and which transformational activities will follow.

Once the themes have been prioritized, the crystallization process occurs. The organization or workgroup creates shared images of a preferred future. This is the fourth of the generic processes. Creating shared images of the preferred future requires that stakeholders actively participate in building a new association. That means that no structures are holy. That means that the sacred cows will be slaughtered. Peter Drucker says that managers may believe that industry structures are ordained by God, but they are not.²

These structures can and do change, often overnight. This change creates opportunities for innovation. Appreciative Inquiry provides a framework for capitalizing on these opportunities for innovation.

When working through the fourth process, it is important to examine everything from policies, procedures, products, practices, services and systems. What the preferred future will look like in your meetings department or member relations or finance will be a direct result of the input from your stakeholders. It will be linked to the first questions posed as you began the inquiry. One trade association used the processes to launch a

profitable series of webinars and to retool their entire education function to make better use of technology. Another restructured their marketing function so that marketers went out regularly and built relationships with potential members. The association that you build will be different from others in the industry. It will better meet the needs of the distinctive constituencies you serve.

The fifth of the generic processes is all about innovation. It requires that everyone invest in discovering or developing innovative ways to create the preferred future defined in the previous steps. The process has revealed endless opportunities for innovation. New sources of opportunity have undoubtedly been discovered. It is now time to make things happen. This is the hard, focused, intensely purposeful work of the appreciative process.

Once the innovations are launched, a communication strategy and persuasion campaign begins. The communication strategy sets the stage for wide-scale acceptance.³ It also keeps the climate positive, keeps stakeholders engaged and increases the likelihood of sustainable implementation. Appreciative processes provide new contexts for action. The persuasion process is less difficult than in traditional, deficit-based change approaches. This is so because stakeholders have managed and owned the entire process. The changes are not being imposed on them by a charismatic leader, executive team or board of directors that supposes it has all of the answers for the association's future.

Another Use for AI in Associations

The bulk of this article has been devoted to using the *Five Generic Processes* for large scale transformative efforts. The process can also be applied to creating smaller scale change. Appreciative processes have still other applications within associations. The American College of Health Care Administrator's (ACHCA) executive team and board of directors applied an appreciative approach to strategic planning. They used an adaptation of David Cooperrider's *4-D Model*. The model follows:

- Discovery – uncover the best of what is
- Dream – imagine the possibilities for the organization
- Design – build dialogue about what could and should be
- Destiny – create what will ultimately be

The ACHCA team began the process by identifying Moments of Excellence for the board and the association.⁴ This process allowed them to reflect with pride on their successes, victories and the like. The 4-D Model was then used to plan for each of the association's four overarching goals. The goals ran the gamut from financial viability to

2. Peter Drucker, *The Discipline of Innovation* (*Harvard Business Review*, November/December 1998), adaptation.

3. David A. Garvin and Michael A. Roberto, *Change Through Persuasion* (*Harvard Business Review*, February 2005), adaptation.

4. Adapted from *The Essential of Appreciative Inquiry: A Roadmap for Creating Positive Futures*, by Bernard J. Mohr and Jane Magruder Watkins

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programming to member satisfaction. Small workgroups were tasked with applying each stage of the model to their assigned goal. Additionally, the team explored what the goals meant to them as individuals and the implications of the goals for the long term care profession. They also committed to individual action plans to implement and evaluate the action steps required to reach the association's strategic objectives. Each team member selected an accountability partner to help the entire group stay on track with implementing the plan.

It should be noted that the ACHCA team did not jump right into an appreciative approach to strategic planning. They began their planning retreat by identifying key components of effective boards. They identified critical competencies for success as a board, addressed issues of board identity and clarified what they deemed the most critical elements of board work. Because few of the team members were familiar with Appreciative Inquiry, the facilitator provided them with a tutorial on the theoretical underpinnings of the approach. They entered the experience with clarity on their own responsibilities, moved on to the essential information required to utilize appreciative principles and were then able to actually apply the principles to strategic planning.

Summary

Association leaders serious about staying on the forefront of innovation can utilize the principles of Appreciative Inquiry to transform their organizations. This approach differs dramatically from traditional, deficit-based approaches to organizational change. While customary methods begin by identifying a problem or problems, moves to root

cause analyses and then eventually to solution generation. Appreciative methods generate a wider range of options for the association based on past successes, Moments of Excellence and points of pride. Solutions are not defined simply by a leader or executive team. Instead, multiple stakeholders are active participants in the process of redefining the association. Solutions stick because they are rooted in replicable successes and generated by people genuinely invested in defining the wide range of positive possibilities for the association.

While both the Five Generic Processes and 4-D Model are presented as linear, discrete processes, in fact they are more iterative. Participants in appreciative processes are immersed in an on-going flow of ideas and activity. The facilitator is charged with helping them continue to generate outcomes, implement as required, evaluate and return to the process. However, for the purposes of explanation and illustration, the models are best presented in a step-by-step format in spite of their iterative, often ebb and flow nature.

The very essence of Appreciative Inquiry is inclusive. It is a natural tool for keeping employees engaged, members interested and the entire association focused on positive outcomes. Appreciative approaches present options for strategic planning, organizational transformations and any number of other business imperatives.

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