AI Practitioner

The international journal of AI best practice

CONTENTS

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Positive Transformation of Government

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"In these troubled, uncertain times, we don't need more command and control; we need better means to engage everyone's intelligence in solving challenges and crises as they arise."
- Meg Wheatley, Finding Our Way: Leadership for an Uncertain Time

There was a time when citizens didn't look to government systems to feed the poor, to send rockets into space, or to investigate the steroid use of celebrated baseball players. Evidence of government transformation surrounds us around the globe, and its pace of change hastens year after year.

But it's not just the pace of change in government that gives us pause; it's also the conditions in which change is taking place, in particular the ever-increasing value placed on partnerships/collaboration, shared values, and participatory planning methods.

Marv Weisbord relates to this in a practice-theory road map he calls the "Learning Curve" (Weisbord, 1987, p.261). This chronicles the thinking patterns of organization development pioneers, such as Frederick Taylor, who in the early1900s sought singled-out experts to solve problems, a concept referred to as scientific management. Progressing into the 1950s, Kurt Lewin's descendants introduced participative management, in which everyone solved their own problems.

By 1965, systems thinking trends took over, wherein experts improved whole systems. By 2000, this trend has evolved to where Weisbord is most hopeful: getting everyone involved in improving whole systems. (Weisbord, 1987)

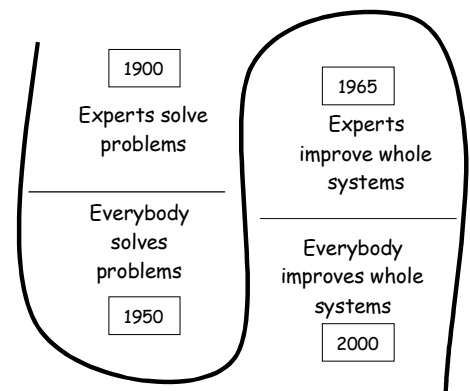What Weisbord labeled a "new practice theory" back in the mid-80s

Figure 1: Marvin Weisbord's Learning Curve

seems to tell the story of government trends true today. Not only are we witnessing a shift from a focus on parts to the whole system, but also a migration from expert to participatory approaches. Why? Because Governments are welcoming more voices into the room and acknowledging they are now (as they've always been) members of a shared system – two key tenets of Appreciative Inquiry (AI). This issue of AI Practitioner aims at learning from and celebrating transformations using case studies that span AI applications from government systems around the world.

Case In Point: A Look at the United States Government since the 1990s

The US Federal government has undergone enormous change in the last fifteen years, shifting in many places from hierarchical command-and-control to self-managed team structures. Just as government's dependency on teams escalated, so did the complexity of work. Outsourcing became increasingly popular, as did the emergence of information technology and the World Wide Web, demanding new, diverse, multi-disciplinary skills pivotal to workplace efficiency. Furthermore, by the late 1990s a tidal wave of retirements loomed as the average age of the US government workforce climbed to the mid-forties. Few agencies had begun to cope with the upcoming loss of their soon-to-be retired workforce, and the need for succession planning and leadership development skyrocketed as agencies readied to usher in the new millennium.

The President's Management Agenda (PMA) of 2000 offered some promise in its five initiatives. Among these was the Strategic Management of Human Capital to recruit and retain the right mix of staff skills in government agencies. This placed a sharper focus on developing leadership to create workplaces of choice, on improving listening skills as well as growing appreciation for internal and external alliances related to the government system.

Some agencies went even further to question "what's in a 'system'?" acknowledging their interdependence, and the shared consequences and benefits of collective actions. Perhaps this became most apparent following September 11, 2001, as beyond the US, governments and citizens world-wide recognized their shared commitment to protecting a global community.

Given this increasing closeness around the world, we're noticing a shift in government trends from the directive to collaborative, independent to interdependent, and exclusive to inclusive. While the principles of Appreciative Inquiry support this paradigm shift, their democratic tenets present many challenges for the bureaucratic tendencies of government around the world

Addressing the Challenges and Enabling the Paradigm Shift

A primary challenge to enabling this paradigm shift is in the dance between control and autonomy. Formal, bureaucratic government structures and processes are designed to sustain control while minimizing surprise. To meet the demands of this shift, there is a need to let go — decentralizing, or even "horizontalizing" organizational structures to maximize autonomy. AI supports this shift by introducing democratic processes that not only allow for the inclusion of many voices but also energize and empower people to be accountable for their ideas and actions.

New trends in changing governmental leadership styles require managers to be more adaptive and flexible to the needs of a diverse, multidisciplinary workforce. Leadership must be ready and not only willing but wanting to listen and involve more people in decision-making. This means being comfortable not having all the answers but trusting the collective to generate possibilities that will benefit the whole.

"Sometimes when I talk [to leaders] for the first time about AI, they think that it's an

abdication of leadership potentially – an abdication of authority and so on – and it's just the opposite. You can't lead unless you're in the heartbeat of the people."
- David Cooperrider, the Second International Conference on Appreciative Inquiry

The traditional approach of focusing on what doesn't work must be replaced with building organizations that are strengths-based. To quote Peter Drucker in a recent interview with David Cooperrider: "The task of leadership is to align strengths in ways that make weaknesses irrelevant." This brand of leadership calls for a tremendous amount of courage, as it requires a shift from of a position of firm judgers focusing on what is broken, to curious, open learners exploring what might be at its best. This shift can be accomplished through inquiry and dialogue. By being open to the emergent and the unknown, generative conversations around inquiry occur that are not stuck in absolutes. This is quite a shift for some bureaucratic systems, and yet, as you will see in this issue, such methods are already working.

What You Will Find in this Issue

The post-September 11th world forever changed how we live. There is a necessary stronger sense of community, more communication, and more interdependence, and this is reflected in how we govern. The case studies in this issue reflect this, demonstrating an increasingly overwhelming value placed on inclusivity and alliances within and beyond our own systems.

The case studies included in this issue reflect an array of positive transformations in government that broaden and deepen our practice. Martin Kormanik and Loretta Randolph explore the use of AI in a traditional organizational assessment in a regulatory agency within the US federal government. Anne Drabczyk shares her appreciative inquiry into citizen and emergency responder shared values, and Myriem Le Ferrand describes using AI to affect culture change in the Rocky Mountain National Park. Roselyn Kay and Marilou Bova reflect on their use of AI for teambuilding and planning with a NASA leadership team. Catherine McKenna explores appreciative approaches to developing a mentoring pilot for a Canadian government agency, and Jen and Tony Silbert explore lessons in leading and fostering empowered and collaborative workplaces in the US National Intelligence Community. Robert Masselink, Annemarie van Iren, and Robbert Braak tell about the use of AI to assess a pilot leadership development program across the Dutch government. And Mary O'Reilly, Ken Elstein, Cheri Torres, and Rainey Weisenberger look at using AI Summits and Experiential Learning to ignite leadership at all levels in the US Environmental Protection Agency.

We hope you find the approaches, key learnings and innovations of these cases engaging and inspiring, broadening the possibilities for still more positive transformations of government for years to come.

Jen Hetzel Silbert, Loretta Randolph, and Lee Salmon
Guest Editors, May 2005

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From Challenge to Opportunity: Incorporating a Positive Approach to Accelerate Constructive Change in a US Regulatory Agency

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Values shared by Community Response Teams: Improving Our Nation's Emergency Preparedness

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Appreciative Inquiry in the U.S. National Intelligence Community: Lessons in Leading and Fostering Empowered and Collaborative Workplaces

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"Igniting Leadership at All Levels" in the Federal Workplace: An Experiment for Organizational Change at US EPA's Office of Research and Development (ORD)

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About the August 2005 issue Positive Impact of Conflict.

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From Challenge to Opportunity: Incorporating a Positive Approach to Accelerate Constructive Change in a US Government Regulatory Agency

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"If you are supported and nurtured you can do great things. People are so focused on the negative – it is as if the employees are the enemy." Interviewee

The client organization, a 10,000 employee United States (U.S.) Government regulatory agency, had undergone substantive and ongoing change in a short period of time. By mid-2001, there was an atmosphere of uncertainty and distrust of additional planned change efforts that would significantly change the organizational structure and reporting relationships. This project case study highlights the assessments of two agency components and the use of AI to conduct those assessments. The authors served as consultants on the project.

Client Objectives

The first assessment involved an agency component that provides technical and scientific information to internal and external customers. The client objectives for the first assessment were to reassess roles and functions and provide recommendations to improve efficiency and effectiveness in support of current and anticipated needs of internal and external customers. A central component of this assessment was to review and validate a self-assessment that had been conducted by agency staff.

The purpose of the second assessment was to assess the need for reorganization among the critical, mission-related support services of environmental health and safety, labor and employee relations and civil rights. The agency wanted an independent, objective assessment and recommendations regarding reorganization. A substantial challenge was the client's request for completion of both assessments within a six-week time frame.

Process

The client hired the consultants to conduct both assessments, working in collaboration with the agency's internal workforce transition staff throughout the whole project. The consultants viewed this project as an opportunity to effectively use AI in what was considered a traditional organizational assessment. It also presented an opportunity to shift client thinking from the traditional problem/deficit approach to a positive, strengths-based approach.

During the initial client meeting, the consultants conducted an inquiry with the internal staff, exploring expectations for project success. That initial inquiry helped identify key stakeholders to include in future inquiries during both assessments. It also helped generate an interview protocol that prompted respondents to articulate the importance of their role, their peak experiences within the agency, organizational core values, challenges facing the agency, hopes for the outcome of the assessment and future hopes for the agency.

The first assessment involved validating the previous self-assessment. The iterative process entailed customizing and validating an interview protocol for collecting data from all stakeholders, including managers, customers, and staff employees at Washington, DC HQ and U.S. field locations. Based on the analysis of the interview data, the next phase included customizing and validating a protocol for conducting focus groups at HQ and field locations to validate and augment the initial findings. Focus group participants included internal and external customers, senior agency leadership, and employee/management groups. The last phases of the first assessment entailed writing a final report of the findings and conclusions, developing collaborative recommendations and potential solutions, and briefing senior agency leadership. Similarly, the second assessment included customizing and validating a protocol; collecting data through interviews and focus groups of employees, agency senior leadership, and agency managers across the U.S.; preparing a summary report of findings and conclusions, potential solutions, and recommendations; and, briefing senior leadership.
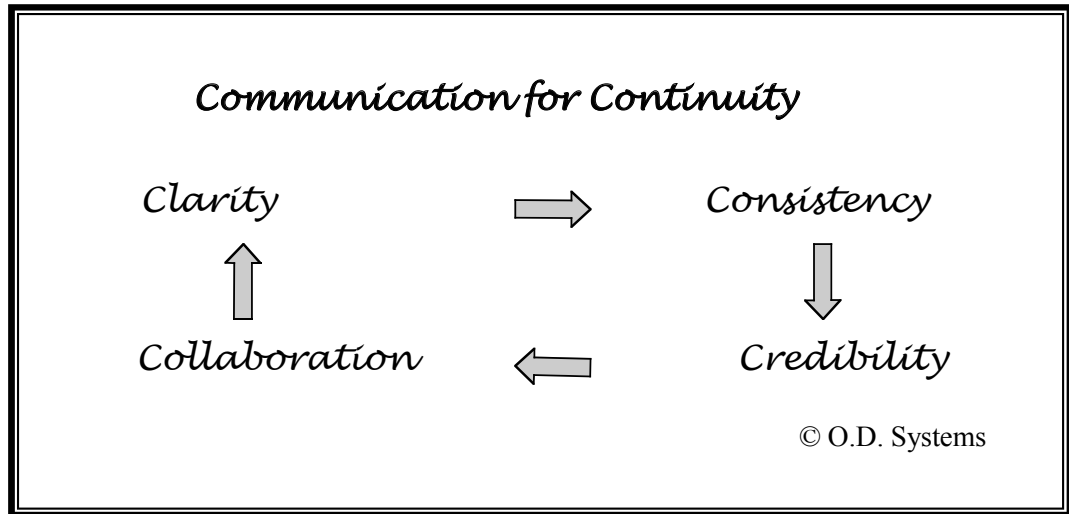
Both assessments included development of an implementation plan; vetting of the findings and recommendations, and the implementation plan with the internal staff; and, briefing senior leadership. Throughout the project, the stakeholders examined and identified areas where the current systems were successful and determined ways to leverage those successes (i.e., make the successes more consistent).

All assessment activities were completed in partnership with the internal staff. Activities included customizing the data collection instruments using appreciative change strategies and positive, strengths-based questions. The collaborative approach ensured employee involvement, created ownership of the assessment recommendations, built momentum for change, and contained costs. The collaboration ensured that all units were part of, and had input into, the self-review and validation of the project outputs. The internal partners played a pivotal role, serving as both an advisory group to the project, as well as a partner with the consultants in reviewing the prior agency self-assessment and determining methods for the current two assessments. The internal partners became the linking pin between the consultants and agency components. As an added benefit, this collaboration provided a developmental assignment for the internal staff, resulting in increased knowledge and skills for implementing the recommendations arising from this project.

Changes & Outcomes

The positive, strengths-based, approach to change brought a unique focus to the creation of highly functioning entities in the organization. This AI approach sought to discover and leverage agency functions that were healthy, working optimally, and which allowed employees to perform at their best. The approach invited people to look beyond challenges; to focus on strategies used to overcome difficult situations and, perhaps, make some good out of difficult situations. Individuals and groups who participated in this project gained tremendous energy to dream and construct a better future for the agency.

Issues of trust, unity of purpose, collaboration, proactive vs. reactive actions, and consistent customer service surfaced in both assessments. The "*4-C Communication for Continuity Model*" helped communicate the findings and recommendations about these issues to senior leadership.

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│                                                 │
│         Communication for Continuity            │
│                                                 │
│   Clarity          ⟹        Consistency         │
│      ⟰                           ⟱              │
│   Collaboration    ⟸         Credibility        │
│                                                 │
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The co-created recommendations included making changes to the agency's structure. A key, overarching recommendation was to foster an environment of shared responsibility by involving all employees at every level of the organization in any planned change implementation initiatives. The project resulted in implementation of recommendations. The recommendations became part of the agency's strategic and action plans, in alignment with Government Performance Results Act mandates. The agency also published this document and posted it on the agency's website.

The internal staff acknowledged that the project benefited from the AI approach, and advocated its use in the implementation of the recommendations because it would positively affect the recommended large-scale changes. The innovative approach would begin to move the agency *up* a generative, success spiral rather than *down* a deficit, failure one. The project team recognized that the continued use of collaborative inquiry and a connection to success and accomplishments would shift the focus from changing people, to building a full potential organization in which employees want to work.

One of the values of AI is "equal voices and equal partnership." The success of this project, in part, resulted from the equal partnership built into the design and used throughout the process. The clients met the consultants with the same intent.

This spirit of collaboration and shared interests resulted in additional assessment work done in another area of the agency using the same AI approach and methods. The consultants conducted an occupational assessment for another agency component. The purpose was to examine the recruitment, training, and retention of field-located officers. The consultants customized and validated protocols; conducted interviews and focus groups with internal and external customers, senior agency leadership, and employee/management groups; prepared a summary report of findings and conclusions, potential solutions, and recommendations; and, briefed senior leadership. Again, within a short time frame, the consultants efficiently completed the work. The output provided another example of the successful use of an appreciative approach to organizational assessment. As a result of the consistency and continuity of the AI approach the stakeholders were able to identify systemic organizational issues beyond those delimited by the initial scope of the project.

Innovations/Learnings/Insights/Wishes

This project showed that an AI approach can be effective in even the most traditional of organization development projects. It also demonstrated that using an AI approach can achieve results more quickly than using traditional approaches. This project provided three key learnings: the importance of partnership, the importance of inquiry, and the importance of hearing all voices.

The Importance of Partnership: The need to complete the project within a very short time frame accelerated all activities. The primary factor in enabling this to occur was the relationship between the consultants and the internal staff. The internal staff was both proactive and responsive to providing needed information and entree to key organizational stakeholders. By being authentic and honest with one another, these two groups co-created a process as equal partners without any of the traditional "government official – contractor" animosity.

The Importance of Inquiry: The information generated by the interview and focus group protocols supported the premise that change begins with the first question asked. After experiencing the questions, a new language – a language of inquiry — began to appear in the daily interactions among key stakeholders.

The Importance of Hearing All Voices: As with many organizations that have had a history of "change done to them," agency employees were initially resistant to participate in the process. Once they became engaged in the inquiry and saw their own words in the output (i.e., findings, conclusions, recommendations), they began to feel trusted and listened to. Their sense of being trusted engendered their reciprocal trust in the organization.

Perspective from Within the Agency

Working together, the consultants and internal staff completed both assessments within the time constraints. After completion of the project, the agency indicated that the contractor's positive approach ensured efficient completion of both assessments according to the proposed timeline and exceeding the agency's effectiveness criteria. Because of this, the agency nominated the consultants' firm for an award. Unbeknownst to the consultants, the agency's contracting officer made the nomination, saying, "*O.D. Systems provided a creative, positive, and highly successful approach to a difficult task. The agency was extremely satisfied with the work of O.D. Systems.*" Subsequently, the nomination went to the Departmental level and the contractor received the award of *Small Business Contractor of the Year*. In giving the award, the agency revealed that the contractor's positive approach to organizational change accomplished more in six weeks than the traditional deficit-based approach used by another contractor had accomplished during the preceding 12-month period.

Four years have passed and AI is alive and well within this agency. The internal workforce transition staff continues to use an appreciative approach in its day-to-day work. A senior executive recently reported:

"The studies using the Appreciative Inquiry model were in my view very successful. We are eternally grateful for your exposing us to AI. Internal staff now uses this approach in its work and other parts of our organization have embraced it."

Appreciative Inquiry and Natural Resource Management in Rocky Mountain National Park

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This case explores stewardship of natural resources in one of the U.S. Department of the Interior's National Parks, Rocky Mountain National Park (RMNP).   Over three million persons visit this park a year for the thrill of reaching accessible yet well-preserved tundra landscapes. In this case we'll explore how Appreciative Inquiry (AI) offered an innovative means to discovering social and ecological sustainability in a national park setting.

Culture in National Parks

In natural resource management, culture can be somewhat narrowly viewed as an archeological or historical artifact (like an old cabin) rather than as a living force within a social setting. In this project, it seemed useful to reclaim the use of the word "culture" in a national park setting so that it might include the contemporary activities of people visiting the park. A premise in this project is that our cultural life is at the core of our ability to utilize resources in a sustainable manner. AI supported this process by revealing how language enhanced peoples' sense of belonging to the park's culture.

Stewardship as a Focus of Inquiry

The topic of inquiry for this case was an investigation of stewardship in a national park setting. This responded to a desire by National Park Service staff and the Rocky Mountain Nature Association (RMNA) to increase a sense of belonging and stewardship in national park visitors, an effort that was funded by the Justine and Leslie Fidel Bailey endowment. According to the Chief of Interpretation, RMNP has one of the largest volunteer programs in the National Park Service. Last year, more than 2000 volunteers contributed over 100,000 hours of time.

Experiencing Appreciative Inquiry in a National Park – Personal Reflections

I had a wonderful time interacting with twenty-six participants in August 2004. The digitally recorded interviews ranged in length from nine to fifty minutes. A local woman familiar with oral history produced 180 pages of transcribed text. They were long days, but exciting ones in which I discovered the enthusiasms of those that sacrifice income and urban convenience to be involved with RMNP.

Four primary research themes were selected: "Defining Stewardship," "A Spectrum of Stewardship Activities," "Why Individuals Engage in Stewardship Activities," and "Sharing a Culture of Stewardship." After much exploration of documents, places, people and ideas, I settled into a research protocol and chose participants on the basis of their involvement with RMNP, e.g. NPS staff, RMNA member, concessionaire, researcher, volunteer or visitor. They took part on an anonymous and confidential basis. I formulated questions to elicit unconditionally positive responses of extraordinary, favorite or exceptional memories of events, places and persons. I used three questionnaires depending on the availability of participants, the desired depth of response, interview setting and expected depth of experience with stewardship research themes.

Discovering Stewardship Culture through Contextual Coding

Contextual coding is a form of qualitative analysis that relies on extracting linguistic meaning within the context of its use. It was especially useful in this case. The transcripts were reviewed several times to identify key points, which were paraphrased in a side column. Responses were sorted into the primary research themes and statements were clustered into conceptually distinct sub-themes within each primary research theme. Each cluster was "coded" with a name that reflected the clustered meaning of participant statements. The relationship of each cluster of meaning to other clusters permits the development of conclusions about the topic of inquiry, which in this case was stewardship.

When I coded participant responses on defining stewardship, participants tended toward three clusters of meaning:

- The preservation ideal
- The intangible quality of the ideal
- How one goes about conducting stewardship activities.

A definition of stewardship emerged from the research, "Engaging Park resources so as to perpetuate or enact in everyday life the preservation ideal."

Another theme that emerged in the data related to the sharing of stewardship culture. Throughout the interviews, participants highlighted ways to enjoy the resource, their

appreciation for the resource and why it should be preserved. Participants referred to a way of life and to passing that idea along to others. Stewardship proved to be at the positive core of interactions within the Park.

Presenting the Discovery and Getting Feedback

After contextually codifying the interviews, I prepared a slide presentation for participants and others interested in RMNP focusing on an image of what is and what could expand a sense of belonging to the stewardship culture of the Park. The audience responded warmly and the director of RMNA was enthusiastic noting "It is amazing what you were able to do with that material. It is like you just shook it up until all the pieces fell into place."

I then sought feedback from those with whom I consulted on early design of the inquiry asking: "What emerged from the research that you would wish to build upon?"

Some thought they were unlikely to do anything different as a result of the research. While others, such as the Director of RMNA wrote: "…from the nonprofit viewpoint, the significance of this research is overwhelming, since it helps examine the cause behind people's decision to move from being a casual visitor or employee to becoming a natural resource or park stewards. We need to understand that we are serious about fostering long-term stewardship for our parks and other natural areas."

He went on to request that the results be presented at a "Friends of the National Parks" conference in October 2005. "I would like to see additional studies of this type done in at least four or five other national park (or even state or city park) sites. …Volunteer programs, philanthropy, membership, and children's environmental education programs can use information generated by studies of this sort." It appears that the inquiry resonated with the already energized non-profit sector, but work remains to be done to engage those involved in the daily park service operations.

Anticipating the Future

These are my hopes for the future:

• With broader recognition of the role of stewardship culture, "Friends of the National Parks" associations may discover the tremendous value of AI in nurturing social and ecological sustainability in park settings.

• An appreciative inquiry could be conducted to strengthen NGO fundraising, increasing the bandwidth of communication between member/donors and NGOs and greater inclusivity.

• This initial phase revealed the roots of, and ways to expand, stewardship in sociocultural and linguistic forms. The remaining phases of the process could reveal "what might be" in terms of sharing stewardship culture.

• Transferring the uplifting energy of the interviews into everyday practice could revitalize many who work in the preservation field.

• By using the language of stewardship, National Park Service administrators could blaze a trail for administrators in other divisions of the Department of Interior.

• By recognizing peak experiences, park leaders could help the stewardship culture flourish not only within national parks, but beyond park boundaries as well.

Values shared by Community Response Teams: Improving Our Nation's Emergency Preparedness

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Due to 9/11, President George W. Bush established Community Emergency Response Teams (CERT) across the nation to aid in national disasters. The purpose of this study was to increase understanding about the individual and shared values of citizen and professional emergency responders. These findings generated recommendations to improve the Nation's emergency preparedness for disaster relief.

Organizational Overview

Post September 11, 2001 President George W. Bush directed the Federal Emergency Management Agency (FEMA) to launch initiatives which would engage citizens and increase volunteerism in America toward enhancing national emergency preparedness and disaster management. The need to have trained citizen responders within communities capable of mirroring the skills of governmental emergency responders was identified as a necessity, because a lag time of up to 72 hours following a national disaster is possible before emergency personnel may be able to reach communities. In order to fulfill the objective, FEMA established government entities throughout the United States called Community Emergency Response Teams (CERT). The core function of a CERT is to enhance the ability of a community to mitigate, prepare, respond, and recover from disasters.

Study Objectives

By studying the shared values of both citizen and emergency responders, it was hoped that CERT partners could build their capability for greater emergency preparedness and disaster management. The approach was to use the Discovery phase of the 4-D cycle to investigate citizen responder values, emergency responder values, and shared values of the CERT partners.

Study Protocol

Two separate research groups were formed: an urban CERT (October 2004) which compromised of three citizen responders and three emergency responders and a rural CERT (December 2004) with four citizen responders and four emergency responders. The participants were formed into pairs of a citizen volunteer and professional emergency responder. Each pair was asked the following four questions which were recorded by transcript, worksheets, and flipcharts.

    1.   Describe a peak experience or highpoint with your CERT. When was the time you were most alive and engaged?

    2.   Without being modest, what is it that you most value about yourself, the nature of your work, and your CERT?

    2.   What are the core factors that give life to your CERT, without which the CERT would cease to exist?

    3.   What are three wishes you have to enhance the health and vitality of your CERT?

Study Outcomes

A purpose of this study was to identify what values might be held individually by a citizen responder or emergency responder, and what values were held jointly by CERT partners. The value of training and hands-on application of skills beyond those learned in the textbook training was the most significant recommendation by participants in this study. Emergency responders appeared vested in the role of protector, as noted through value-statements such as bringing order to chaos, doing the job with dignity, and being responsible. Emergency responders also acknowledged value and good feeling in training volunteers, as a way to better serve their community. One rural emergency responder underscored the sentiment best when he voiced that training CERT was a 'return on investment' and an 'insurance policy'. The findings from this study suggest a creative solution using shared values of CERT participants will help overcome current challenges of disaster management.

Innovations and Recommendations for Future Study

Appreciative Inquiry and CERT

    It was observed that both the citizen and first responder had a greater appreciation of what each member contributes to the CERT. It appeared that facilitating Discovery interviews, as a component of the CERT training, may prove beneficial in solidifying the partnership, and that further study is warranted.

    A pilot study to implement the remaining three AI phases is recommended. Facilitation of the Design phase could possibly answer the following questions: (1) Is CERT recruitment

improved by localizing membership to the work or school environment? (2) Is deployment during a disaster maximized by regionalized CERT teams within one jurisdiction, such as the worksite of school ground, or immediate environs to these locations? (3) Does a CERT cohort within a work or school environment improve membership sustainability? These design issues could be further explored through AI.

Longitudinal Study of CERT

As a partnership, CERT has a fairly limited history of mutual disaster management performance. Although this study has documented shared values of an urban and rural CERT in Ohio, further study is warranted to determine shared values of CERT in regions throughout the U.S.A. Documenting outcomes over time could help to determine best practices for recruitment, training, deployment, and sustainability of the CERT.

Recommendations for Action

The following recommendations for action were based on three wishes that the participants created though group conversation for the continued health and vitality of the CERT.

- **Acknowledging the importance of family support**: Both citizens and emergency responders mentioned the requisite commitment of time necessary to be involved with CERT training and job responsibilities. It would be important to include social supports, such as family and community into CERT. Inclusion of family into graduation or award ceremonies, newsletters, and articles in the local paper when the local CERT responds to a disaster, were all mentioned as avenues to accomplish this objective.

- **Broadening the circle of community preparedness**: In a catastrophic natural disaster, it would be important to have a cadre of employees trained in CERT at industrial work sites. This would extend capacity of emergency responders by handling the immediate needs of the high density area of industry, and ongoing association with company employees/fellow CERT members would allow for ease in orchestrating ongoing drills and educational refresher courses. It was also suggested that seniors in high school should be trained in CERT to (1) gain exposure to volunteerism, (2) acquire first aid, safety, and problem-solving skills, and (3) serve as a platform for leadership opportunities.

- **CERT Coordinator** – Commitment of a full-time CERT coordinator was recommended. Characteristics of a dedicated CERT coordinator were listed as enthusiasm, communication and listening skills, leadership, inclusion of members by ongoing phone calls, newsletters, meeting notices, and inclusion of members in the planning processes.

Conclusion

This study has demonstrated that shared values do exist between citizen and emergency responders and provide insight into next steps toward national preparedness capacity building. The citizen responder must have opportunities to apply skills, and the emergency responder needs to know that the citizen will be ready whenever an emergency warrants resource expansion. The take-away message that resonates from this research is that for CERT to advance to the requisite post 9/11 level of national preparedness continued efforts for mutual understanding among the principal members of CERT are essential.

Strategic Planning and Team Building: NASA's Experience

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What happens when a dispirited group in a government agency caught up in a negative spiral is introduced to Appreciative Inquiry? This article highlights the interaction between strategic planning and team building, and how using an appreciative approach shifted management and employees into a productive, collaborative and dynamic relationship.
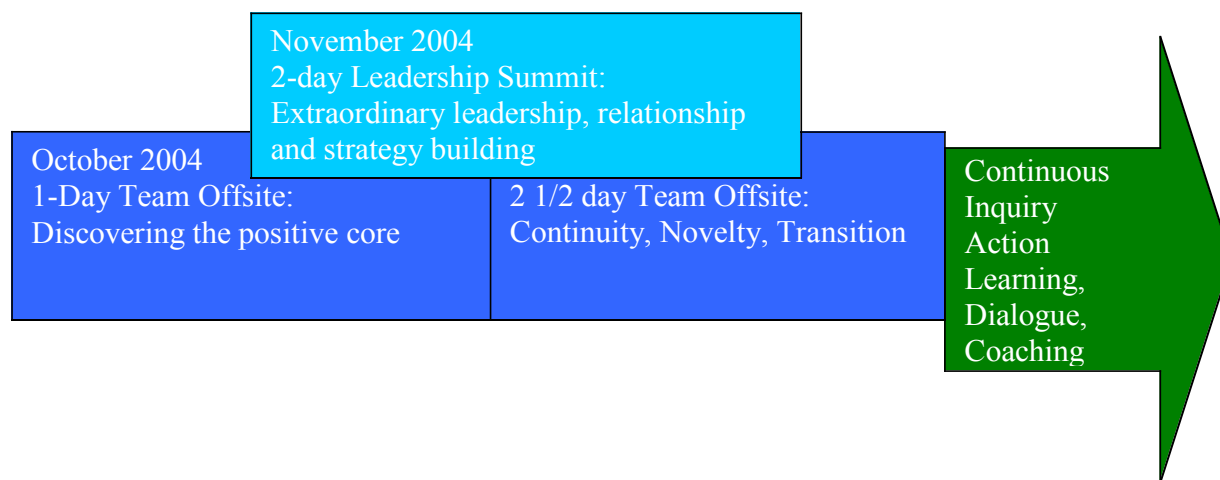
The Client

The client organization's role within NASA is to elevate its public profile, share its achievements, and support NASA's efforts to gain a sufficient budget to ensure its "return to flight" and other important initiatives. In December 2003, a new Associate Administrator (AA) was appointed and shortly thereafter, a new Deputy Administrator (DA). The division was reorganized and staff reshuffled resulting in many departures and new hires. By May 2004, during intense efforts to raise NASA's appropriations, a team offsite uncovered major issues around trust, respect, integrity and communication among leaders and team members. With concern that these issues might influence the organization's ability to achieve its "high stakes" goals, the AA requested the support of consultants to facilitate a one-day team offsite in October of 2004.

The AA and Deputy explained that with ever expanding responsibilities and "high stakes" goals, it was crucial that they:

1. Build a strong team where collaboration and seamless communication are operating norms and where knowledge is shared.

2. Build a cohesive, strength-based leadership team with the ability to energize and engage everyone to succeed.

3. Develop energizing strategies, goals and action plans.

The Project

With these goals in mind, we offered Appreciative Inquiry for its ability to generate enthusiasm through positive inquiry, illuminate the positive core, identify strengths and surface organization and individual hopes that underlie complaints. While we felt that the offsite was a great place to start, it seemed insufficient to address all of their objectives. For this reason we suggested that they reconvene in January for a 2-day offsite that would include Center staff and have its inquiry focused on strategic goals in terms of continuity, novelty and transition. Also, to support their desire to develop leadership, we suggested they add a 2 1/2 day Leadership Summit where leaders would inquire into extraordinary leadership, dream about possibilities for leadership, and begin drafting strategies that would elevate the positive core and use the strengths of the organization.

October 2004 1-Day Team Offsite: Discovering the positive core	November 2004 2-day Leadership Summit: Extraordinary leadership, relationship and strategy building	
	2 1/2 day Team Offsite: Continuity, Novelty, Transition	Continuous Inquiry Action Learning, Dialogue, Coaching

While an ideal way to begin the work would have been with a core team learning about AI and developing of the initial discovery protocol, the budget and circumstances did not support it. While each session had AI as its process for Discovery, Dream, Design, and Destiny, this story focuses on positive inquiry because inquiry emerged time and again as catalytic in inspiring the group's learning and strategy building.

Team Retreat, October 2004 – Inquiry into positive core
At the team offsite, the focus of the inquiry was trust, respect, integrity and communication. With limited time to introduce AI, we presented "problem solving versus AI" and immediately engaged the group in inquiry. Improbable pairs—younger and older staff members, managers and administrative support personnel and new staff members with tenured staff—inquired together. As they delved deeper into discovery, the power of inquiry brought out animation and laughter as they shared positive stories around high points, integrity, respect and trust. In the debrief, participants stated how much they learned about their peers and were delighted to discover that they shared values and hopes for the future.

A young woman, new to the team, was invited to share with others a comment she made during break. She asked why if we have the same values and desires for trust, teamwork and respect is it so hard to work together or to get along. It wasn't so much what she said as the way she said it that left everyone with pause – one could hear a pin drop.

In closing, team members commented on how valuable it was to be given the opportunity to interview others and that it gave them time to get to know each other. The inquiry process and resulting meaning making reminded them to look for moments when trust, integrity, and respect were present and it opened powerful new lines of communication. Post retreat, one of the new managers offered that she found the protocol so useful in helping her get to know her colleagues, she interviewed ten people on the team.

Leadership Summit, November 2004 – The next step
Building on the base of trust and improved communications created in the Team Retreat, we chose to do the leadership summit next. This was particularly appropriate because many of the managers were new to each other and they had not yet built cohesiveness and trust between them. As is typical of many organizations, NASA leadership retreats often include people at similar "levels" in the organization. For the Summit, we encouraged the Associate

Administrator and Deputy Administrator to include all the managers, including deputies and a NASA Center leader on rotation to the group. The deputies would later note that it was the first time that any of them had the opportunity to engage with senior management for team building or strategic planning. Their inclusion helped to deepen the connection with their Directors, the Associate Administrator, and their Deputy Administrator, while learning about each other and connecting as a team.

Through inquiry participant pairs elicited high points at NASA, experiences with extraordinary leadership, their role with respect to NASA's mission/vision, and their hopes for the future. In the debrief it was interesting to note that when managers shared their experiences with extraordinary, strength-based leaders, they realized that what they want in a leader is often challenging for them to be as a leader.

Leadership Team Development & Skill building
We shared AI in more detail with the management team focusing on the power of inquiry as a means of building shared vision, and focusing on strengths as a way to energize positive action. Skill building included learning and practicing dialogue skills, using open-ended questions to gain greater understanding of the issues from their team members or from other groups within the organization. Bringing it back to AI, we asked them how valuable it would be if they were able to check out their own and others' underlying assumptions using a positive approach to their inquiry.

In this summit it was clear that inquiry advanced team cohesiveness as they got to know each other on a deeper level. Trust began to grow as they began to understand each other. The inquiry and dialogue during the Leadership Summit had an immediate impact on the members of the leadership team. Reviewing evaluations of the Leadership Summit, the following takeaways were noted:

"I listened hard to destroy incorrect assumptions about my co-worker."

"Allowing lower level employees to provide input to the organization—a rarity for most organizations at NASA and I've worked with or in almost all of them!"

"I greatly appreciated senior leadership participation – they were just one of the gang."

"The opportunity to make a difference in the future of the organization; that will hopefully translate into future successes for the agency."

"I really value that my colleagues were open to my ideas and the ideas of everyone at the retreat. I believe a great atmosphere was created for honest and constructive dialogue."

Team Retreat, January 2005 - Continuity, Novelty and Transition
The groundwork having been laid in the first two meetings, the goal of the Team Retreat was to bring together all team members from Centers and HQ to work on adding substance to the draft strategic plan and to build strong relationships for collaborative action. The inquiry was directed to the strategic goals and was designed to gather stories of continuity, novelty, and transition. In closing, many mentioned that having the opportunity to interview each other helped to establish or build relationships, and they were appreciative of having had the opportunity to be involved in the strategy development process. Most valued was the fact that senior leadership worked together with the team throughout the retreat.

Results

In follow-up with managers and members of the team, they identified the following key results from these three experiences:

- A more focused approach and better tracking of strategic actions.
- Division Directors initiated a regular meeting for addressing issues and addressing information.
- People were more inclusive, sharing information, and realized how powerful it is to do so in supporting each other. There was greater collaboration and significantly more communication across divisional groups and centers.
- Deputy Administrator began one-on-one meetings with Division Directors as a means to stay proactive and focused on strategies going forward.

Positive change is taking hold more firmly each day. Team members at all levels report feeling engaged in the work and the direction of the organization. There is awareness of a shift from the traditional expert model of management and interaction characterized by "telling," to an appreciative, inquiry-based form of interaction. In recognition of these results and in order to sustain them, the client has committed to continue capacity building activities during 2005, which will include several retreats, team action learning, coaching and dialogue sessions.

Summary

This case highlights the possibilities that can result from introducing AI in a client system that heretofore would have chosen a more traditional approach. The power of inquiry was evidenced at each step along the way and, further, the significant success and the positive changes were made possible because of senior management's willingness to break the mold to open up the conversation to an ever-increasing number of people who impact the success of the whole. We, as consultants, were reminded that "being AI" and being able to hold the space for the client to try inquiry as a new approach was by itself powerful. Inquiry here was clearly ignition to positive change.

Appreciative Program Design: A successful mentoring pilot at a Research and Development Agency within the Government of Canada

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In 2003, a R&D Agency within the Canadian government providing leading edge science and technology to its clients identified a need to develop future leaders. Like many scientific organizations, the Agency faces a challenge: How do you build a culture of learning that connects the calling of a scientist with the possibilities of organizational leadership? Mentoring was identified as a way to tap existing resources to build such a culture. This article describes the pilot mentoring programme, key learnings and success factors.

The objective of the pilot mentoring programme was to increase the number of powerful, trusting, learning relationships across organizational levels – the kind of relationships that foster development of well-rounded and inspired future leaders. Desired outcomes of the pilot were:

1.   Support the performance & learning of the scientific group leaders and aspiring managers in their current roles.

2.   Contribute to the development of a pool of potential future managers.

3.   Foster informed career decision-making, respecting the interests of every individual.

Three key design requirements were identified for the pilot:

1.   The programme acknowledges the culture of the R&D Agency and a sense of ownership for the programme within the Agency. Appreciative Inquiry was a natural fit because it assumes that the seeds of a preferred future are already present and it emphasizes system-wide participation.

2.   The programme is a facilitated rather than a formal mentoring programme where participation is mandatory, and mentors and mentees are assigned to one another. A facilitated mentoring programme aims for a balance between helpful intervention and autonomy. It emphasizes voluntary participation.

3.   The programme tests the viability of mentorship across geographic centres. The agency operates six research centres across Canada, each with a unique combination of expertise and facilities.

Project summary

Step 1: A team of 5 volunteers representing various functions and every geographic centre from across the country came together with the project manager and consultants (the author in partnership with Graybridge-Malkam) for two days of learning about mentoring. The team was named the "Mentoring Implementation Team" or MIT. This ownership by line stakeholders was considered to be a key success factor of the pilot. Using a simple protocol,

the MIT conducted a core team appreciative inquiry into their very best learning relationships. They used learning from their interviews with one another to construct the questions they would ask their colleagues in a broader inquiry and to create the following interview preface:

When we are part of a great learning relationship we share our knowledge and ourselves. Early on we connect because something "clicks" between us, and over time the relationship becomes so valuable that we gladly make time for it; sometimes even going beyond everyday expectations for the other person. Not only do we benefit from our connection to that person, we benefit from the connection to their network of colleagues and contacts. Great learning relationships also shape our attitudes and develop our self-awareness. Their impact often remains with us beyond the relationship itself – and sometimes even for life.

Step 2: The MIT conducted interviews with potential mentors and mentees to learn about conditions that gave life to their very best learning relationships and what they would want to see included in an Agency mentor programme.

Step 3: The MIT met for a 2-day design session that was facilitated as an AI 4D process:

Discovery: They shared stories, made meaning of the data about powerful learning relationships and listed the wishes Agency employees had for their mentoring programme.

Dream: Together, they did a dream activity in which they imagined a future in which they had built an exceptional mentoring programme.

Design: The team mapped the structural and relationship elements in their organization (using the Mohr-Watkins goose egg) that would affect their ability to create the best possible programme and designed all the required elements of their programme. (insert table here or before Step 4)

Delivery: The pilot was launched!

Step 4: Mentees and mentors were recruited from all centres. The majority of mentors were senior managers and the majority of mentees were team leaders. Participants were asked to fill out the profiles designed by the MIT to facilitate the matching process. Some volunteered, and others were invited by MIT members and the Project Manager. Having spent many years as a senior leader in the organization, his network of relationships and access to senior managers enabled him to attract a significant portion of the pool of potential mentors.

Step 5: Matches were made, launching 22 mentorships. Some matches were at the request of the mentee or mentor, others were suggested by the Project Manager based on personal knowledge and profiles. It was up to the mentor and mentee together to confirm that they were comfortable with the match.

Step 6: Mentors and mentees participated in a 1-day training programme designed and delivered by the consultants. The training emphasized confidentiality, discussion about expectations, goal setting and relationship building.

Step 7: Over the one-year duration of the pilot, two mid programme check-in questionnaires were sent and two articles were distributed: one on active listening and one on giving and receiving feedback. The check-ins happened 3 and 6 months after the launch.

Step 8: Appreciative evaluation of the pilot: The MIT conducted face-to-face appreciative interviews of every mentor and mentee. We also asked each participant to complete a

questionnaire about the benefits they received and the usefulness of aspects of the programme.

Step 9: The MIT discussed the evaluation data and made recommendations for next steps.

The evaluation data indicates that all three of the pilot objectives were met: having a mentor was a positive experience for most mentees and mentors; the proportion of mentees who received career advice, insight into management and support in their current role; the support elements (training, handbook etc) which were the most useful and the balance between structure & autonomy. However, the most compelling evidence that this pilot was transformative lies in the stories the mentors and mentees told about their experience. In their final interviews mentees spoke of high trust relationships that they value deeply, of learning about life in another centre, of seeing management in a new way. Mentors spoke about the satisfaction of helping a colleague, about receiving feedback and having their own thinking challenged, and about gaining insight into other areas of research. Here is a selection of memorable quotes:

"Hearing about my experience expanded my mentee's view of what is possible – our conversations changed her view of management as a career choice."

"The confidences have been honoured and I am free to discuss, without reservation, topics about my career progression. We have an understanding that topics of an "operational" nature follow the normal chain of command. That definition of "boundaries" has been very important."

"A unique relationship has been established that I cannot find with other colleagues in the organization. Insightful perspectives provided on corporate and career management issues."

"It broadened my perspective – my knowledge of the organization – seeing my job, my centre, through other eyes makes me a better leader."

Key Learnings

1.   An appreciative approach generates creativity and produces results, even if it is in the background! The consultants were engaged for this project because of their backgrounds in designing and managing mentoring programmes. AI wasn't even mentioned in the proposal. They decided not to spend time teaching about AI but to "just do it". The use of straightforward explanatory language was a contributing factor in the acceptance and use of AI process.

2.   Some of the pilot's key success factors were the role of the senior champion, the emphasis on establishing clear expectations and confidentiality at the beginning of the relationship and the ongoing support that the MIT provided in their centres.

3.   This project is an example of how important it is to have a diverse, representative core team. The MIT provided connection to different parts of the organization, ownership of the programme, continuity and a pool of resources to share the work of managing the programme. It was particularly useful to have a member of the communication department on the MIT.

4.   The project demonstrated the possibility of gathering quantitative data without losing the appreciative quality of our inquiry. Rather than asking "did you or did you not receive

career advice", a list of potential benefits was presented and participants asked which they had received. Responses were plotted (i.e. 75% of mentees reported they received greater insight into management roles).

5.   The MIT took the time to do it right. This project has lasted 2 full years, and there were numerous occasions in which quality was favoured over expediency.

The Agency mentoring pilot demonstrates the value of AI as an approach to designing a programme that is appropriate for the organizational culture. The sustained energy and commitment from the client allowed the inquiry process to come full circle just as the popular graphic of the 5Ds suggests that AI should: the pilot began with inquiry into learning relationships and ended with further inquiry into the learning relationships the pilot had established. The involvement of the MIT throughout means that the capability to replicate what was done resides in the system. If an expanded mentoring programme is funded and the personal commitment of senior management continues, this R&D Agency is destined to be a place where a tapestry of mentorships will be the source of inspired leadership for the future.
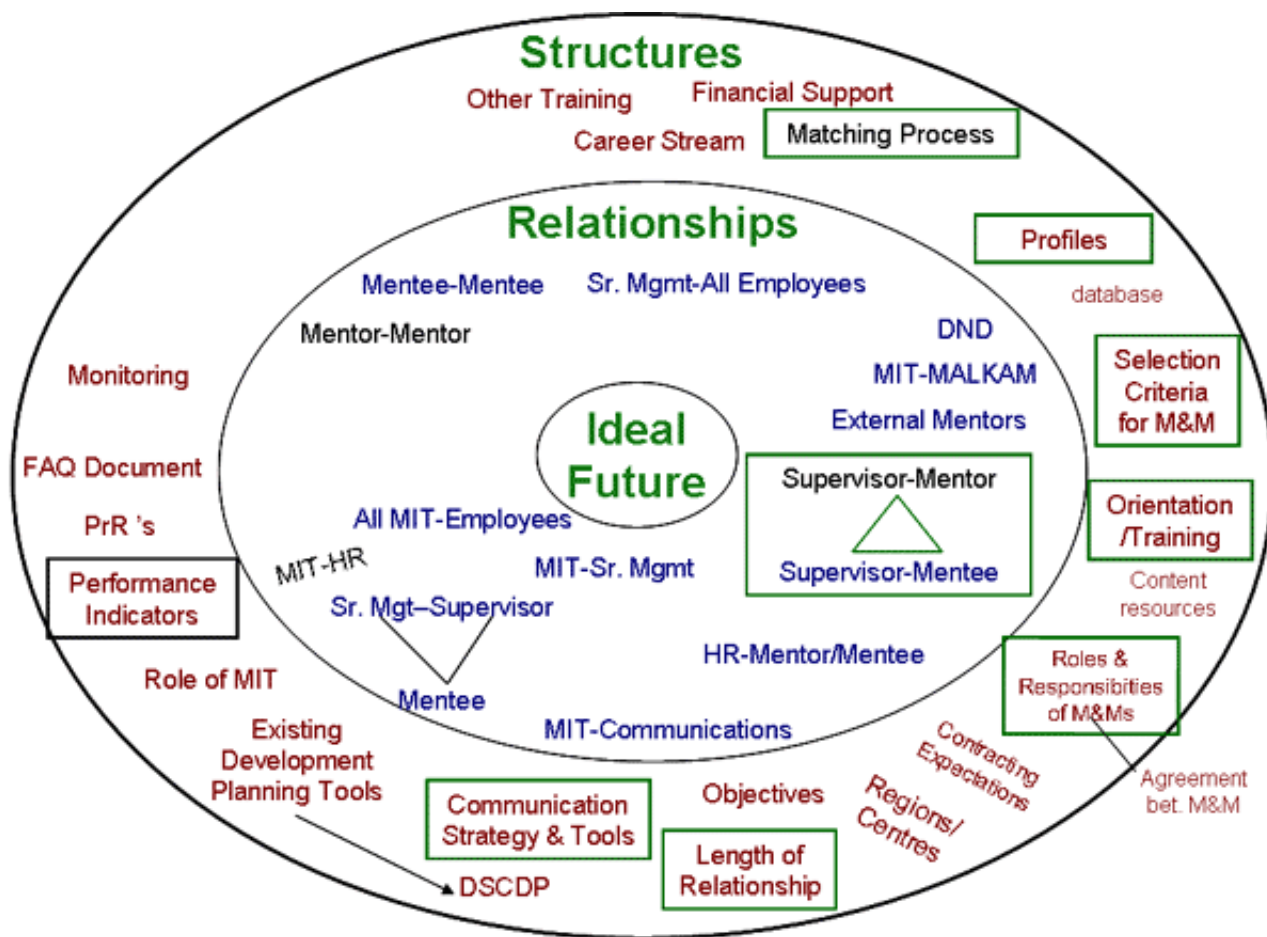
Appreciative Inquiry in the U.S. National Intelligence Community: Lessons in Leading and Fostering Empowered and Collaborative Workplaces

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"I don't know about this Appreciative Inquiry stuff," she said, "but I have a hunch you can make it work for my folks." Little did this newly appointed Chief know how quickly her leap of faith would pay off. What started as a typical offsite planning process, turned into a highly participatory and empowering inter-organizational collaboration with impressive results – in less than one month. The following article explores how bold and empowering leadership helped create a participative strategic plan. Specifically, this case study examines how the Strategic Assessments Group (SAG) within the U.S. National Intelligence Community applied Appreciative Inquiry (AI) to create its 2004 strategic plan, but in the process wound up reinventing itself as a highly collaborative service organization and achieved impressive results quickly.

Background

Employing some of the Intel Community's top analysts/"futurists," the Strategic Assessments Group (SAG) aimed to be the U.S. Government's exemplar for analyzing both strategic and current intelligence and anticipating the most advantageous course of action. Their mission was to not only challenge the mindset of policy makers, but to continually challenge their own mindsets—to be open to all possibilities and to anticipate the unknown.

Organizational shifts throughout the past several years resulted in many changes across the agency – including the dissolution of some offices and the creation of other new ones, in order to adapt to the rapidly changing needs and landscape. If SAG did not act fast, they risked "growing stale" to emerging competitive forces and getting dissolved as well.
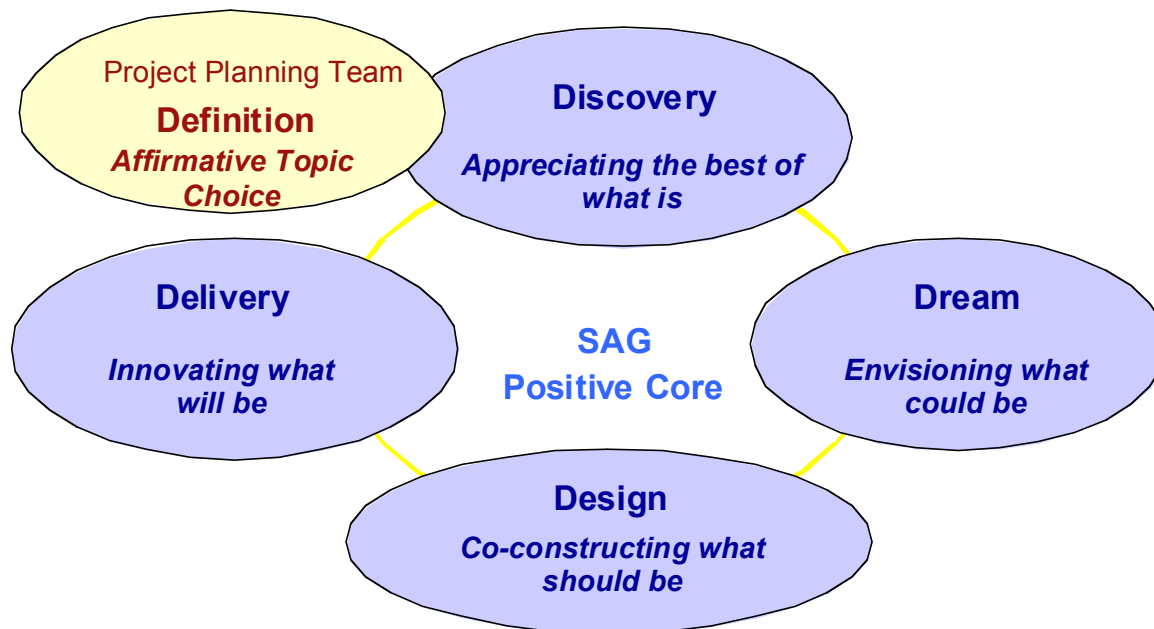
SAG leadership wanted to redefine itself in a manner that was quick and steadfast, in spite of the potential resistance it faced by its many diverse voices. The objectives for the February 2004 offsite were:

- To co-create a SAG vision and strategy
- To increase awareness/understanding of SAG strengths, values, and reputation for analytic best practices
- To enhance alignment of SAG techniques, products, and services with agency goals, strategies, and objectives
- To achieve action-oriented results—transform SAG vision into action

Approach

To achieve the desired outcomes and objectives listed above, an Appreciative Inquiry (AI) summit planning and facilitation process was used. The AI approach included a "5-D" process of Definition, Discovery, Dream, Design, and Delivery (shown in the figure opposite). The following sections explore some unique aspects of this process.

AI 5-D Process

Project Planning Team
Definition
Affirmative Topic Choice

Discovery
Appreciating the best of what is

Delivery
Innovating what will be

SAG Positive Core

Dream
Envisioning what could be

Design
Co-constructing what should be

Equality of voices

From initial exploratory conversations to the first project planning team meeting, the SAG Chief admitted that her uncertainty in using AI stemmed from never using such a highly participatory process that ensured an equality of voices. Strategic planning and decision making in her 25+ years of government service had been reserved exclusively to senior-ranking officials, which was contrary to the proposed "democratic" whole system engagement made possible by the AI summit approach.

The first opportunity to see the participatory process in action was when six staff representing various stakeholder levels came together for a Project Planning Team meeting. Included in this group was the Chief's Administrative Assistant who arrived to the kickoff meeting presuming she had little to contribute beyond logistics and site-coordination. Following a brief AI paired interview, she understood—perhaps for the first time—her unique strengths and gifts to the team. Bringing over 15 years of SAG history to the group dialogue, she uncovered rich stories of best practices and hopes she had seen and heard throughout her years and from across the organization. Her affirmation quickly spread across the planning team. In the time it took for them to complete their first AI interview, they had rediscovered their purpose for serving and belonging in SAG, as well as their burning questions and hopes for improvement. The inclusive, strength-based focus of an AI process was gaining credibility, and the SAG Chief was pleasantly surprised and encouraged by the creative emergence made possible by empowering equal voices on the team, regardless of position or title.

SAG leadership's support for a democratic, whole system strategic planning process continued to grow. To formally kickoff the summit in early February 2004, the Director of SAG's parent organization stood up to welcome all in attendance. During his commentary

he shared his vision for SAG's path ahead, which left many to wonder why they had been invited to plan a strategy that was quite possibly pre-determined for them. When the Director finished, the SAG Chief stood up and appreciatively acknowledged his willingness to share his vision and hopes for SAG, but then also acknowledged that it was only one vision and that each participant at the summit had a vision of his or her own that also needed to be explored. "For the next two days," she said, "we are all equals in this room."

Commitment through whole system engagement

Another distinguishing aspect of this case was the emergence of commitment as a result of whole system engagement. Small and large group dialogues at the beginning of Day One often included the suggestions of internal and external stakeholders who referred to SAG in the third person ("SAG needs to …" and "SAG should consider…"). However, in listening to the same people speak several hours later—immediately following the discovery of the SAG positive core—one could hear a noticeable shift to first person ("We need to…" and "We ought to consider…"). Though diverse in experiences, perspectives, and backgrounds, participants discovered common ground and a more compelling sense of ownership. As their hopes for improvement grew clearer and more compelling from the *Discovery* and *Dream* activities, so did their commitment to turning energizing ideas into present-day reality.

Day Two of the summit focused on the *Design* phase of the process. The group identified five compelling design topics—strategic categories for carrying the SAG vision forward and transforming ideas into action – including:

1. Customer Support and Networking – Creating Customer Intimacy
2. Influencing and Elevating Analysis: Ideation and Policy Support (The "What")
3. Innovative Analysis: Tradecraft and Corporate Learning (The "How")
4. Creative Collection
5. Personnel and Organizational Evolution

Participants created a roadmap for the way forward, identifying key initiatives by topic area and the associated roles, success measures, and time frames.

Changes and Outcomes

By the end of the summit, topic "champions" emerged for each of the five key areas identified, each responsible for assembling interested participants to prioritize initiatives and activities for their area. A separate Review Team was also established, consisting of the topic champions and the SAG Deputy Chief, who were collectively responsible for collating and synthesizing all input and creating a draft report for presentation to the whole within three weeks.

The work of the topic champions and review team resulted in two briefings which were used to communicate plans and progress across the system, collect input/feedback, and sustain momentum and support (in particular from higher-level leadership) for the 2004 SAG Strategic Plan.

Above and beyond the plans, reports, and communication briefings, however, was a renewed sense of collaboration felt across the organization. For example, employees

formerly housed in separate buildings began exploring new "spacing" options that would enable them to share offices or at least reside closer together. Additionally, several summit participants committed to interview persons who were unable to attend the summit as a means of ensuring everyone felt included on the journey ahead.

"What made this effort different from other strategic planning events is the opportunity it gave us to engage in a new kind of conversation — one that invites everyone to participate, while tapping into the positive, what we look like when we're at our best. You could sense people's 'surprise' in making new connections and relationships as their ideas emerged. I didn't have to force or direct them to do anything. Collaboration was a natural result." – SAG Chief

Summary of Key Learnings
The story of SAG's application of Appreciative Inquiry to create its 2004 strategic plan presents several key learnings around its contributing factors of success.

1.   It had the support of bold, engaged leadership encouraging equality of voice. Though a leap of faith at project onset, SAG leadership committed to engaging in a participatory, whole system AI strategic planning process wherein every voice had a chance to be heard. This required a delicate balance in listening to the expectations of her superiors while eliciting the ideas and hopes of persons scattered across her organizational system.

2.   It fostered an empowered and collaborative workforce that accelerated the change wave. The SAG AI Summit sped up the change process by directly engaging the entire system in envisioning, designing, and implementing the change. A strategy development process that normally takes 12-18 months was ready for launch within two months from project conception.

3.   It produced commitment and inspired action. During the SAG summit everyone was involved at some level in developing the strategy, so that when it was implemented there was minimal resistance; it was not necessary to sell or force implementation plans upon organizational members. Further, by taking the time to discover SAG's strengths, best practices, and hopes—its positive core—participants gained a clearer understanding of how their diverse individual contributions fit into the big picture and they were more compelled to self-organize and collaborate around shared images of the most desired path ahead. This fostered a positive, sustainable change force that unified internal and external stakeholders behind a common strategy, creating a clear blueprint for individual and collective action.

Innovation in Leadership Development within the Dutch Government

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Three years ago the Dutch government started a unique Leadership Development (LD) program for high potential managers who will reach executive positions within the next five to ten years in 13 government ministries. External consultants were engaged to conduct an evaluation of the LD-program and make recommendations for program improvement. This article describes the evaluation process used, the project outcomes, and learnings and insights from the process.

Background

In 1995 the Dutch Ministry of Internal Affairs sought to improve the quality of government and to change the culture to one that was more people, society and change oriented. Three years ago, as a result of this initiative, a Leadership Development (LD) Program for high potential candidates was started. Each year a new class of approximately 25 participants starts the program which runs from two to four years.   The initial class has just finished and two classes are currently running.

Client Objectives

The client's objectives for this evaluation were:

- To complete a strategic evaluation of the LD program to see if its goals were being attained. These are to create a new leadership culture and to create new leaders who were internally driven and externally focused
- To hold a strategic dialogue with all stakeholders important to the LD program
- To make recommendations for the design of future classes of the LD program

The Evaluation Process

The evaluation was carried out by a project team of 15 people consisting of representatives of the different stakeholder groups and the two external consultants. The evaluation process started in September 2004 and was completed in February, 2005. The timeline (opposite) outlines key activities.

Kick off meeting (Discovery)

This was the formal start of the process. Members of the project team worked on developing the evaluation process, appreciative themes and questions, and their roles and tasks during the process. Appreciative Inquiry was introduced, appreciative interviews were held and questionnaires developed. This provided an opportunity for members of the project team to

be trained in the AI method. An interview protocol was developed around the following themes:

- Connection of the LD-program with the everyday practice of the candidates of the program and with societal issues;
- Potential impact of the LD-program on the cultures within the ministries and especially those of the working environment of the candidates;
- Marketing of the LD-program, especially its reputation and familiarity with important stakeholders;
- Improvement of leadership qualities within the Dutch government.

After the launch meeting, approximately 70 interviews were planned and conducted with directors, candidates and management development officials within the ministries. The external consultants processed the interviews into mind maps, in which much of the richness of the interviews was kept. In order to attain a rich and multi-interpretable narrative on the appreciative themes from the interviews, they also produced a mosaic story in which many details of individual stories were interwoven with each other.

The positive core of the LD-program that came out of the interviews was very clear and consistent across all groups. Major components of the positive core of the LD-program included: a strong focus on personal development as leaders instead of managers; the integration of the parts of the program — know yourself, know your profession and know the world; and the importance of being part of a learning group for two years in which interdepartmental exchanges took place.

Future workshop (Dream and Design)
At the next meeting we gathered with approximately 30 people to discuss the outcomes of the interviews, to appreciate the major strengths of the program and to develop images of
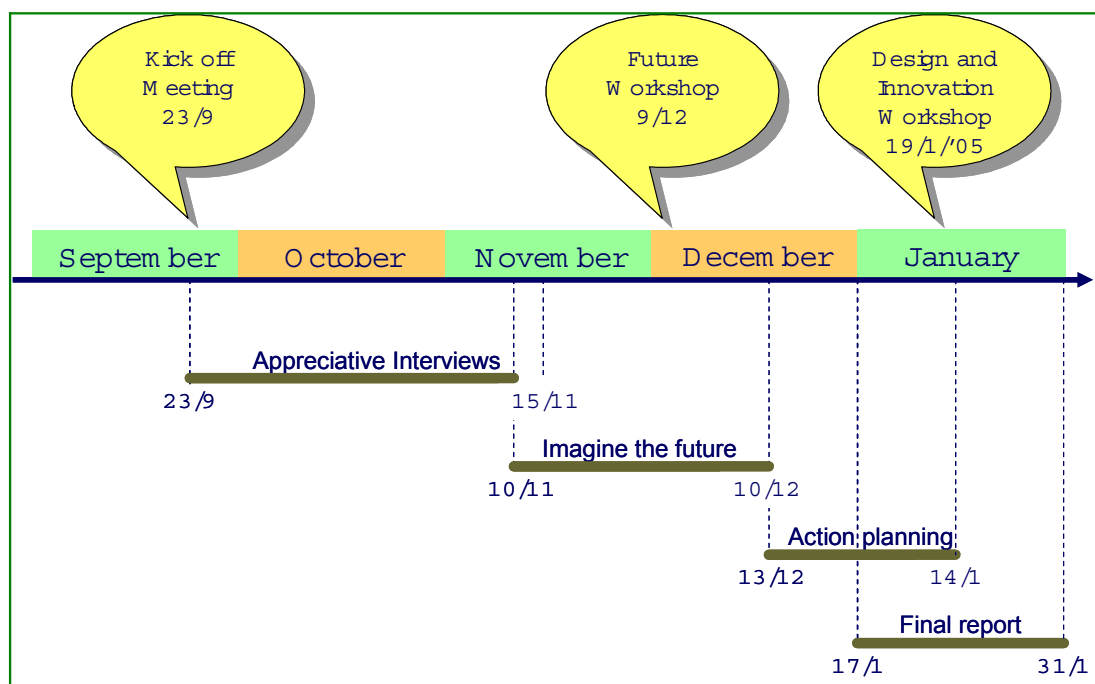
the future of the program. We elaborated on five themes, which emerged out of the Discovery phase, and asked the participants to dream a future over the next five years, based on one of these themes.   We asked participants to imagine a very successful LD-program, which produced great leaders and would had a major impact on government culture. We asked participants to imagine what that would look like and what was needed in order to reach this imagined future. As a result, four future scenarios were developed, presented in an original manner with the help of an artist who created drawings of individual group's future images.

It became very clear that the LD-program was a little diamond with great potential but not known or recognized by its environment. Much emphasis had been put on developing the content of the LD program and too little on developing strong relationships with the ministries. Because of this, the convincing added-value for the ministries of the characteristics and the advantages of the LD-program were missing.

One future scenario: The LD-program as a shop where interested civil servants can choose.

Workshop Action Planning (Destiny)
It was our hope that during the final meeting, spontaneous initiatives and actions would occur as a result of the outcomes of the previous steps in the AI-process. We made this very concrete and real by asking: "What is it that YOU want to achieve within three years?" Many ideas were developed and we asked the participants to choose one or two to work on. We used the 5x3- formula: "If this is what you would like to have realised within 3 years then what do you need to have realised within 3 months, 3 weeks, 3 days and the next 3 hours?" This format generated a lot of energy and resulted in several actionable initiatives.

After this meeting we drafted our report as a logbook of the whole process in which all steps, outcomes, drawings, protocols and mind maps were integrated. To this very complete case description we added our own reflections of the process and our recommendations.

Project Outcomes

- During the evaluation process the preparations for the development of the next program in 2006 had begun. Insights from the evaluation process were used, including: attaining better learning in the workplace of the participants; and making the LD-process more accessible for other people;

- Several issues for members of the program staff (not satisfactorily discussed before), came to the fore and set internal changes in motion. One issue was staff changing roles

- A project was started to connect the LD-program with other development initiatives, in order to achieve a more integrated development process (from junior to executive)

- A book will be published with all profiles of the participants and their accomplishments written down in order to make them, and the LD-program, better known

Appreciative learning and insights

- Stakeholders become actively involved in the strategic discussion about the future of the LD-program. Participants were invited to step into the process, become involved and influence the effectiveness of the program for the better, instead of commenting on it from a distance. Newly formed relationships among the stakeholders have appeared. Now, program staff need to further develop these newly established relationships.

- Certain actions have already been set in motion. The process generated enough energy for individuals to take action. The client will begin to make the changes rather than wait until the final report is published and agreed by the major stakeholders involved.

- The evaluation process has been a change process in itself. Participants such as program staff, have been influenced, and in a way, changed by the evaluation process. This occurred because the awareness about the LD program, its content, and development has been raised considerably. People have changed their opinions about the program. Some prior resistance has been transformed into enthusiasm and commitment. The impact of the process has already been seen before the final report has been received.

- The impact the program had on its environment, because of the appreciative approach. Our observation was that it was difficult for people, especially those from a bureaucratic environment, to approach the program positively. In many bureaucratic settings, much energy is spent on what goes wrong, which results in moaning and bad mouthing from a distance. It came as a pleasant surprise for many people were interviewed that we invited them to talk about the program in a positive manner and with attention towards their own positive experiences.

Igniting Leadership at All Levels in the Federal Workplace: An Experiment for Organizational Change at US EPA's Office of Research and Development (ORD)[1]

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The US Environmental Protection Agency's (EPA) Office of Research and Development (ORD) began a courageous journey in 1995 to prepare for the new millennium. This was to be a conversation of hope discovering and dreaming together, and designing change efforts to generate the very best science to protect the American people. The following narrative explains our rationale for using AI as a means for cultural change, our first steps towards change, the results thus far, and what, we believe, the future holds. It also includes a description of how we brought together Experiential Learning with AI to foster cultural change.

Background

EPA's vital mission is to protect human health and our environment. To do this, we realised we would have to excel amidst the challenges of severe resource constraints, a wave of retiring staff (rich with the history and knowledge of ORD's past), and revolutionary advances in science and technology. Our success would require us to rethink how we utilize our talented workforce to produce quicker, smarter, and better solutions to ensure the earth's vitality. Key to our ability to embark on this formidable effort was the insistence of our senior management official, Deputy Assistant Administrator Henry Longest, that his vision of a collaborative, integrated organization of "one" ORD could be achieved. Although fully aware that many would doubt, and may even oppose, this change effort, he provided the resources to forge ahead and the tenacity and inspirational leadership to win over allies one by one and heart by heart.

Our efforts began with six Organizational Climate Surveys taken over an eight-year period to monitor the progress of our change efforts and to identify ORD's high-performing managers. In addition, holding a series of open, large-scale meetings allowed us to begin engaging the entire workforce (all 2000 geographically dispersed scientists, engineers, managers and administrative staff) in this vision and to identify the "up-and-comers" and those who saw great hope in change. It was this coalition of 75 high-performing and energetic change agents (the Leadership Coalition) that, at Mr. Longest's direction, looked for innovative ways to enrich and enliven our organization; ways that came to rely upon the power of Appreciative Inquiry (AI).

The Journey

In the spring and summer of 2002, the Leadership Coalition designated a 36-member Action Team to identify best management practices and innovative approaches that ORD might consider replicating. This Leadership Coalition Action Team (LCAT) began experimenting with new ways to ignite leadership. The exploration of AI began with a series of small workshops to increase our understanding of AI's 4-D process through the use of both high- and low-ropes experiential-learning (EL) exercises geared toward increasing the team's self-awareness and mutual understanding.

Upon experiencing AI's transformational potential, the LCAT partnered with Dr. David Cooperrider to sort through our many pressing topics, develop the pre-summit process (to include pre-summit interviews with over 200 staff), and plan an event in which a cross-section of ORD scientists, engineers, managers and administrative staff would use an appreciative approach to co-design a new ORD.   Using the AI process, the LCAT settled upon a summit topic of igniting leadership at all levels of the organization, with subtopics of pervasive leadership, liberating collaboration, and empowering trust.

The First Leadership Summit — January 2003
Our summit, entitled "Igniting Leadership At All Levels: ORD Working Together to Ensure the Earth's Vitality" was launched in January 2003. The four-day event hosted 350 participants drawn from all ORD Labs/Centers/Offices, and external stakeholders from the U.S. EPA and from outside the Federal workplace. In essence, the whole ORD system was in the room! Diana Arsenian provided brilliant graphic recordings of the process, interactions and elements of group reports; Admiral Hart of the U.S. Navy and Sheri Schulte of Roadway, Inc. shared their AI success stories, futurist Dr. David Rejeski stimulated our imagination and Frank Barrett underscored improvisational Jazz as a metaphor for a minimal organizational structure that achieves breakthrough innovations. In total, forty projects resulted from the Summit.

While the event itself surpassed both attendee and organizer expectations, in the weeks that followed, we experienced a gradual dissipation of energy as employees became too overwhelmed with the urgencies of the present to work toward building our future. In addition, a significant number of managers (few of whom attended the summit) perceived this grassroots effort as either a distraction from the work that needed to be done or an affront to their authority, and so denied staff the time to work on their projects.

During this time, the LCAT continued to take a leadership role, meeting regularly to identify ways to better link the work to managerial ranks, to keep steadfast in igniting leadership at all levels, and to support the group projects (of which 14 became institutionalized or continued in larger forms). This dedicated group established a user-friendly, information-rich summit website and launched the ORD Changing Times newsletter which contained leadership stories from throughout the ORD network, summit-project reports focused on the innovative ways in which staff pursued their goals and highlights of positive changes occurring throughout the organization.

Yet, the most important step the LCAT took toward bolstering this transformational effort was to commit to a second AI summit focused on helping ORD Managers visualize their roles in an empowered workforce. We engaged managers early-on by conducting interviews

that helped us understand their perspectives and priorities, by forming a Managers Advisory Group to help us draft summit materials (interview protocols, announcements, resource materials), and by involving some of our more skeptical managers in all aspects of the summit-planning process itself.   In being more inclusive, we not only reconstructed our relationships with managers, but focused our entire effort by: 1) establishing an image of the manager as a catalyst, 2) articulating our overarching organizational goal as "aligning our strengths in a way that makes our weaknesses irrelevant"[2] , 3) having the key product of the summit be a draft document elucidating ORD's fundamental principles of operation, 4) incorporating experiential-learning exercises to expand participants' thinking and creativity, 5) greatly reducing the number of summit projects to focus our limited resources on the highest priorities, and 6) ensuring that we obtained manager support for these projects.

The Managers' Leadership Summit — August 2004
In mid-August 2004, 350 ORD Managers (mostly scientists and engineers), other US EPA managers and staff, and external stakeholders (including international participants and a student) gathered with the LCAT to Discover, Dream, Design and shape ORD's Destiny. The theme of the summit, "Catalytic Management: Igniting Leadership at All Levels," was to envision managers as catalysts who could bring about four dimensions of change: Visionary Collaboration through one ORD; Scientific Solutions for Today and Tomorrow; Bringing Up the Next Generation; and Creating a Trustworthy Environment. The four-day process again included Diana Arsenian's graphic recordings and Frank Barrett. It also included experiential-learning exercises (see below), and Captain D. Michael Abrashoff's accounts of his remarkable success instilling leadership throughout his 300-crew battleship[3] .

   The high-priority projects from the Managers' Summit were:
   • Honing, Communicating, and Living the ORD Principles
   • Science Drives the Ship: Plan, Manage and Evaluate Science
   • Visionary Collaboration Through One ORD
   • Communicating ORD Science ("W-ORD Radio")
   • Inspiring the Next Generation of Environmental Scientists and Engineers
   • Leadership Development Program; Leadership at All Levels
   • Sustainability
   • Best Practices

The Quiet Revolution — Ongoing
After the Managers' Summit each project team continues to progress at its own pace. The Principles Work Group, in particular, is completing its draft document and will be developing a process to involve all of ORD in the finalization, ratification, and adoption of this new "constitution." Notably, this summit produced a new strategy for instilling change throughout our organization with the establishment of a six-member Leadership Development and Facilitation Staff (LDFS).

   The LDFS includes an internal consulting team that facilitates research- and operations-planning retreats using AI and experiential-learning, and conducts training sessions to promote appreciative and facilitative leadership techniques. To increase awareness of these

tools, the LDFS formed a Marketing Group, which has designed a line of AI- and EL-based services to help clients create shared visions; improve research-planning processes; foster teamwork, innovation, information-sharing, and flexibility[4] ; resolve conflicts[5] ; and build trust, communication, and leadership. Also, the consulting team conducts monthly practice sessions to hone their skills, in particular at moving team members toward committing to the substantive behavioral changes that ultimately will bring about real transformation.

We are beginning to see, in many corners of our organization, transformation at a rate we would not have anticipated – a rate that, by all accounts, may very well be revolutionary.

Next Steps and Thoughts to Date
While we celebrate the successes that we have had over the past several months, we also recognize that we are embarking on a new and very different chapter of our story. With 2005 came the loss of our senior leadership to retirement – both Henry Longest, whose undaunted faith in ORD inspired this quiet revolution, and Dr. Paul Gilman, ORD's Assistant Administrator and EPA Science Advisor who brought an unprecedented level of scientific credibility.

As we are thrust into a storm of uncertainty that we have not experienced for over a decade, two elements have emerged to anchor our efforts: First, Mr. Lek Kadeli, a staunch supporter of the ORD change effort, has stepped in as Acting Deputy Assistant Administrator for Management. He brings with him a strong appreciation of our organization's history together with the two critical components that portend a hopeful future: an unwavering faith in the talents of ORD's staff and managers, and a willingness to experiment in recognition that our success depends on our ability to innovate and to learn from our and others' experiences. Second, our work with AI has put us in the best possible position to identify and seize the opportunities hidden within these upheavals, not only because the AI experience has set us well on our way toward becoming the organization we dreamed we could be, but because we now have, at our disposal, a tool to help staff and managers throughout ORD discover the power of structured dialog in bringing people together to uncover their full potential.

Integrating AI and EL to Foster Cultural Change
Experiential Learning, or EL, was brought together with AI to optimize creative and positive changes at the Summit. EL involves presenting a group with a mentally, and often physically, challenging task, and then helping them reflect upon how they interacted. This reflection is aimed at increasing their awareness of unconscious behaviors and assumptions in order to help them identify how they can work together more effectively. It is the facilitation of this reflective discussion (the debriefing) that is critical to the success of this approach. By integrating the "5D's" of the AI process (Definition, Discovery, Dream, Design and Destiny) into EL debriefings (see Figure 1), Mobile Team Challenge (MTC) has developed an approach that achieves two important endpoints: 1) a constructive dialog focused on building strengths instead of fixing problems, and 2) application of the resulting insights to the workplace in a specific, tangible and meaningful way[6] .

The AI/EL Approach — at the planning stage and in the Summit

The integrated AI/EL approach played an important role in two contexts:

Context 1. Incorporating EL in summit-planning meetings: we assessed where EL would add value to the AI process. Using EL in the summit itself, tensions quickly melted away and managers and scientists spontaneously erupted in laughter and even thunderous applause on successful completing a difficult task. There was more creativity and increased receptivity to new ideas in subsequent discussions.

Context 2. Incorporating AI/EL in the design of the AI summit itself: For example, at the conclusion of the Discovery Phase and Day 1 and prior to the Dream phase, which began the following morning, all attendees participated in a balloon exercise crafted to promote awareness of the synergies that could result from collaborating and sharing resources.

The Success Factors

As we saw conversations change and interactions improve, there are some learnings to ensure and effective integration of AI and EL. These include:

Good coordination of the exercises: It is important that people know what they are being asked to do and that they hear about the instructions at the same time as other groups. With several hundred people in the room, all instructions were given clearly to everyone from the stage

Basic debriefing questions included in the Summit handbook: Appreciative questions to assist the small groups debrief the activity need to be included in the Summit handbook. These questions help frame the conversations.

Skilled facilitators to debrief each group: EL is sufficiently different for many people that they may need help discovering what they learned from the activity or to listen to what their colleagues gained from it. For this reason, it is important to have skilled facilitators in the group who can use probing questions, ask for reflective comments, and surface group-management skills

Discussion leading to increased energy: Attendees' increased energy and reduced frustration followed the intensive small-group discussions.

Footnotes

1. This article has been reviewed by U.S. EPA/ORD and approved for publication. Approval does not signify that the contents necessarily reflect the views and policies of the Agency nor does mention of trade names or commercial products constitute endorsement or recommendation for use.

2. Based on a quote from Peter Drucker during a March 2003 interview with David Cooperrider

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About the August 2005 Issue: Positive Energy of Conflict

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The August 2005 issue of the AI Practitioner will feature The Positive Energy of Conflict: case descriptions, research, and/or practice-focused articles describing how Appreciative Inquiry and other strength-based approaches to change are transforming conflict into something constructive and positive.

As consultants, managers and leaders, we have seen or known times when conflict has been debilitating and made a situation worse. This might be conflict between friends, in teams, throughout a department or organisation, or between groups in a community. And yet, increasingly, there are experiments and initiatives in peace building and relating across cultures, changes in counselling and therapeutic practices, as well as new forms of relating and working in organizations. Mediation and restorative justice are transforming traditional ways of resolving conflict and enabling everyone involved to readjust their lives for the better.

This issue is about highlighting these innovative practices. Consultants, researchers and leaders are invited to submit articles about their experiments, experiences, results and learnings.

Draft article outlines are due May 1, 2005
Send article outlines to Anne Radford editor@aipractitioner.com

Review, selection and notification will be done by May 16, 2005
Final articles, bios and supporting information are due June 10, 2005

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such as web sites, hard copy journals and the AI Discussion
List, and to support the whole tapestry of AI.