



# AI Practitioner

## Team and Group Development the AI Way

Guest Editors: **Cora Reijerse and Ronald van Domburg**

### Inside:

**Team Effectiveness**

**How to Conquer  
Conflict**

**Appreciative Facilitation  
Rules of Thumb**

**Building a Team of  
Passionate Callers**

**Givers Gain/Geven loont**

**Interview with  
Joep C. de Jong**

**Engaging 'the Other'  
in Dialogic Work**

**High-Performing  
Transient Teams**

**AI Research Notes and  
AI Resources**

# International Journal of Appreciative Inquiry

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## Inside:

- 4** Introduction to Team and Group Development the AI Way  
by Cora Reijerse and Ronald van Domburg
- 10** Team Effectiveness: Key Ideas and Developments by Marianne Tracy  
An overview of key ideas and approaches to team development
- 16** Building a Team of Passionate Callers to Enrich Education in Croatia by Jasenka Gojsic and Masa Magzan  
Using AI to build a team for enriching education in Croatia into one that motivates leadership and empowers children
- 21** Engaging 'the Other' in Dialogic Work in a Nursing Home by Ilene Wasserman, Michael Shay, Richard Doran and Yvette Hyater-Adams  
Helping a thirty-year old, large, unionized, urban nursing home address what senior management described as a 'we-they' conflict to create a team
- 25** How to Conquer Conflict with Appreciative Conversation by Richard 'RJ' Johnson  
How do you approach a difficult topic appreciatively – especially one involving one of the toughest topics of all, religion?
- 30** Givers Gain: How a BNI Chapter Reconnected With its Essence by Ronald van Domburg  
What was the result of AI interventions? How were they implemented? Were the effects visible? What did not work so well? What did I learn?
- 34** Geven loont: hoe een BNI chapter zichzelf weer terugvond by Ronald van Domburg  
Wat was het effect van AI interventies? Hoe werd erop gereageerd? Waren er zichtbare effecten? Wat werkte minder goed? Wat heb ik ervan geleerd?

# International Journal of Appreciative Inquiry

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## Inside continued:

- 38** High-performing Transient Teams in Organizations: Integrating AI and Experiential Learning by Miriam Ricketts and Jim Willis  
Teams with short natural life spans need to get up and running very quickly, and remain high-performing throughout their time together
- 44** Appreciative Facilitation Based on Practical Rules of Thumb by Kemp van Ginkel  
Appreciating the strengths of team members to encourage the energy needed to take the next step
- 50** Interview with Joep C. de Jong, an AI Leader of Teams by Cora Reijerse and Ronald van Domburg  
Dutch leader Joep C. de Jong has been working with AI consistently for many years
- 52** In Conclusion: Teambuilding the AI Way – Advantages and New Perspectives by Cora Reijerse and Ronald van Domburg
- 
- 55** **AI Research Notes**  
**by Jan Reed and Lena Holmberg**  
The results of a study from Belgium describing the use of a quantitative approach to explore changes after applying Appreciative Inquiry
- 58** **AI Resources**  
**by Jackie Stavros and Dawn Dole**  
A list of practitioner books on specific AI topics including as evaluation, coaching, knowledge management, strategy, nonprofit management, project management, personal living, community building, relationships, schools and teamwork
- 
- 65** **About the February 2011 Issue**  
Guest Editors: Sarah Lewis and Lesley Moore  
This issue will be devoted to Positive and Appreciative Leadership.
- 66** **IAPG Contacts and AI Practitioner Subscription Information**



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# Team and Group Development the AI Way

**ABSTRACT**

This introduction to the Team and Groups Development issue of AI Practitioner focuses on two topics: 1. The position of Appreciative Teambuilding (ATB) including other theories and models; and 2. What do we learn from the stories from practitioners who work with teams and groups in an AI way? How do they work with AI and what are their results?

**What made us so enthusiastic about the theme of this AIP?**

We are both practitioners, working with people, teams and organizations. In our opinion, the team is the key element within an organization: people identify themselves with the teams they are part of. The team is the smallest unit to work in.

In our experience, working in teams can be heaven and it can be hell. When you are working in a team and you do not agree the next step or how to deal with a stakeholder who is not delivering the level of quality you expect, teamwork can cause a lot of stress. A principal stakeholder who is eager to see results when your confidence in your colleagues is diminishing rapidly can make you wish that you will never have to work in this particular team again. On the other hand, who doesn't know the feeling of joy and trust you share with team members when you are creating something new and are enthusiastic about the ideas that you share: when everything and everybody is in 'the right place'. Like when you are organizing an inspiring event or creating an issue of *AI Practitioner*, which we have been happy to do.

That is why we wanted to inquire about successful and meaningful teamwork: with the hope and the expectation that the AI way can contribute to being in 'the right place'.

We will focus on two topics in this introduction:

- The position of Appreciative Teambuilding (ATB) including other theories and models.
- What do we learn from the stories from practitioners who work with teams and groups in an AI way? How do they work with AI and what are their results?

We think that what is new in ATB is that the human relationships and the task aspects of the team are integrated in all phases. In short, the process is: connect, combine and co-create.

In this issue you will find a kaleidoscopic view of 'Teambuilding the AI Way':

**The position of Appreciative Teambuilding (ATB), including other theories and models**

We wanted to look into how insights about teams and team development have changed over time and how ATB can be placed in the line of these theories.

Effective teams and team leadership have been subjects of interest from the 1930s on. For an overview of the past, see Marianne Tracy's article on 'Team Effectiveness' on page 10.

We looked into how insights about teams and team development have changed over time and how ATB can be placed in the line of these theories.

**Human Relations** The team models that are most cited and used in practice are mostly human relations oriented and deficit-based. Group dynamics is about developing a team from an immature beginning, through phases which circle around the theme: me and the others ('me-we') until a mature stage or resolution of the 'me-we' contradiction/dilemma is reached. This view of team development postulates that it is necessary to struggle with this contradiction to survive as a team and do productive work. In our opinion this is a deficit-based model because the assumption is made that, by nature, we are immature when it comes to the me-we contradiction and we have to solve this problem.

**Task oriented models** Like socio-technics and the self-directed teams of the 1950s, are business models which stress the importance of the redesign of working processes or tasks to improve the quality of work outcome and the wellbeing of workers.

**Models of change and integration** of team dimensions like Appreciative Inquiry bring a strength-based change model into the picture. We think that what is new in this theory is that the human relationships and the task aspects of the team are integrated in all phases. The change process is described as discovering the strength from the past regarding a specific theme, and making connections with each other by finding common ground to design the desired future together and move on to the destiny phase. In short, the process is: connect, combine and co-create.

From the discovery phase onward, the connection between people is centered around a task. We think the power of the model is that, apart from addressing people's strengths, it is this integration that makes it work so quickly. From the first session, when we start working with Appreciative Teambuilding, we see people getting enthusiastic, excited and energized – and getting ready to create the future with each other. It is an amazing and joyful experience that we have never had working with other human relations approaches or psychological test group profile feedback sessions. (See also the article by Miriam Ricketts and Jim Willis on page 38.)

Leaving the task out of teambuilding sessions while stressing individual differences and their merits, dysfunctional communication patterns or conflicting relations between people did not help lead to action and movement. People often said to us: 'Now we understand and see how it doesn't work, but how can we do it better? How can we be successful and deliver better services? This teamwork isn't leading to a better future yet.'

**'The difference between teams and groups: a team has a defined task, a group can consist of several teams.' Ron Fry**

We prefer the AI model as a starting point to approach team and group questions. Gervase Bushe's work is of great help because he offers a rich insight into the working of AI in teams as a practitioner and researcher. His concepts of pre- and post identity teams helps us to understand team questions better and choose the right discovery questions.

Ruth Cohn's 'thematic-centered interaction model' (TCI) also integrates task and relationship components. We think the TCI model can be helpful to us as AI practitioners as a compass to pinpoint the team's question at the beginning and when the team or group gets stuck. In our opinion more severe me-we issues like conflicts and sub-grouping ask for the attention of group leaders and facilitators. Before co-creation is possible these questions need to be resolved.

### **Developing AI team theory – Interview with Ron Fry, Case Western Reserve University**

In addition to the basic AI change model which is also applicable to teams, Ron Fry has developed new insights from his research and experience in working with teams that served as the basic introduction to his book *Appreciative Team Building* with Diana Whitney, Amanda Trosten-Bloom and Jay Cherney.

Cora had an opportunity to interview Ron Fry about teams, groups and AI in Bled at an AI European network meeting in April 2010. They talked about success factors for teams, AI and pre- and post identity teams and Ron's best experiences and stories as a team facilitator.

Ron began by setting out the difference between teams and groups: a team has a defined task; there is required interdependence, they must help each other do their jobs, individually and collectively. A group can consist of several teams, and is mostly about relations. People come together to enjoy each other's company, to inspire and be inspired, or to learn from each other. Regarding networks, Ron said, 'It takes time to struggle with the different goals. The most sustainable networks find a way to combine different goals from the participants.'

He related a high point story about facilitating teams that led to new thinking regarding success factors in task-oriented culture.

### **New thinking about teams: The health care team in the Bronx (NY)**

This story is about a multidisciplinary team of twelve health providers in first line (primary) healthcare, a team of doctors, nurses, social workers and so on.

One team included a doctor and social worker who did not want to communicate directly with each other because they were in conflict. This had a strong, dysfunctional effect on the other team members. Ron started with the traditional approach, trying to help improve communication, empathy and psychological safety in the team, including working directly with this pair. It led to nothing. They did an Appreciative Inquiry on the question, 'When did I feel most attracted to this team?' After sharing images from everyone, they searched for alignment. There were huge differences in expectations about team goals and roles. So they took time to clarify and agree upon goals, roles and procedures. The alignment around these 'task-related' topics was very important. The physician and social worker, for instance, realized that their differences – and resultant negative emotions toward each other – were the direct consequence of totally different

## In all success factors for good teams: clarity comes first, agreement second.

assumptions about team purpose, role responsibilities and so on. As they re-listened to why each was originally committed to be on the team, they found common ground and succeeded in working together in a productive way.

What did it mean to Ron? He was excited with his discovery about the hierarchy of success factors in a team. He found that beginning with a focus on task-oriented topics like goals, roles and procedures actually reduced the need to address so-called interpersonal or personality-related issues that more traditional OD team-building had focused on.

A hierarchy of success factors for good teams:

1. Mission clarity and agreement
2. Goal clarity and agreement
3. Role clarity and agreement
4. Procedure clarity and agreement
5. Relational norms – clear and acceptable

For each, clarity comes first, agreement second.

Another success factor for AI interventions is to have a good stakeholder analysis and have the right people in the room. Having even one external stakeholder to a team in the room, at the team retreat and so on, can make a tremendous difference in helping the team to imagine new possibilities.

AI intervention is about inquiry around the issues listed above. Start with inquiry of experience about the best past team experience or best moments in the current team. Then go deeper into the aspects concerning the first four factors (when goals have seemed most clear or aligned, and so on.). As the team members engage in these dialogues, their interpersonal spaces are altered and relational norms begin to shift – in service of whatever they find is their common agreement about the team's goal, member responsibilities, and key ways they will take important decisions and communicate with each other.

We ended the interview with an inspiring story of a successful alignment and business result in a very difficult situation.

### Successful alignment in a difficult situation: The grocery store chain

The 43-store chain decided to centralize meat processing, packaging and distribution for financial and health reasons. Three hundred butchers would lose their jobs, but only after eighteen months while the new processing facility was being built, staffed and brought on line. The company wanted to use AI to help address the transition of butchers, lay-off effects on morale and the desire to maintain, if not increase meat sales. The management of the grocery store chain decided to use AI in the redundancy process. How would that work in an AI way? How could AI principles help us value these employees, retain them during the eighteen-month transition and help the organization view this as an opportunity to move forward, instead of a severe lay-off and morale loss?

The management team came up with the following principles for the group of butchers as good HRM practice to start with:



Read about the results that came from the Art of Hosting workshop in Croatia in 'Building a Team of Passionate Callers to Enrich Education in Croatia' by Jasenka Gojsic and Masa Magzan.



Creating transient teams in the USA by Miriam Ricketts and Jim Willis.

1. Every butcher should hear the news directly, face-to-face, within two hours.
2. Every employee should hear about it within four hours.
3. Immediate access to counseling and career planning support for all butchers and their families.
4. Immediate Hot Line availability for any employee to access for information and explanation (72 hours).
5. Each butcher would be guaranteed a job in the company for two years beyond if they remained for the following eighteen months, at their current pay rate. If they wished to stay after that, their pay would revert to that of the particular job role they were in.

They created two scenarios:

1. A large team of managers were mobilized to meet each butcher on a Friday morning and for the next 72-hours support services were made available to the butchers and their families, as well as the hot line for any employee.
2. Beginning the following Monday and Tuesday, over the following four weeks, four two-day summits were held in different regions with ten to twelve stores sending teams of eight to ten employees to focus on 'A Meat Shopping Experience that Wows Our Customers.'

85% of the butchers stayed until the end of the eighteen months. The meat sales remained level for 5 months and then increased slightly up to the opening of the new processing system. The high point for Ron was seeing the top management team passionately take on the challenge of how to approach a difficult (and potentially divisive) business decision in a way that embodied appreciative principles and mobilized the whole system to treat it as an opportunity for innovation and improvement.

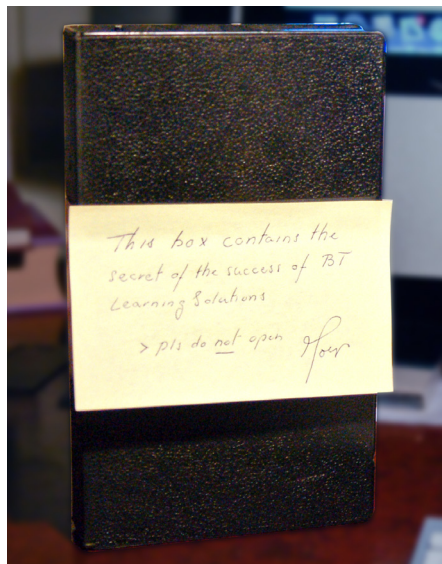
### **What can we learn from the stories? How do practitioners work with AI and what are their results?**

This issue contains a broad range of articles around the theme of team and group development the AI way: stories from different types of organizations (education; a nursing home), from different countries (Croatia; Netherlands; USA); different perspectives (AI leader; facilitator; teacher; trainer); and different types of teams (transient teams; post-identity teams; conflict situations in teams and groups).

Marianne Tracy (USA) answers the question 'What are the essentials and enablers of team effectiveness?' She describes some of the key ideas and approaches regarding the theory and practice of team development.

What happens if a group of eight people start an unorganized, chaotic process to find sustainable solutions for the educational system in Croatia? Find out in the article written by Jasenka Gojsic and Masa Magzan (Croatia) how a situation that started in chaos became fruitful.

'Engaging "the Other" in Dialogic Work in a Nursing Home' is the title of the article written by Ilene Wasserman, Michael Shay, Richard Doran and Yvette



Joep's box with his secrets for success

Hyater-Adams from the ICW Consulting Group (USA). Confronted with a 'we-they' conflict, they chose to start a whole system team-based intervention to create an inclusive workplace.

An original intervention technique is described by Richard 'RJ' Johnson (USA). His story shows us how the use of appreciative conversation can help conquer conflict, even in one of the toughest topics, religion. A business network group was trying to re-kindle its connection with its life-giving energy; Ronald van Domburg (Netherlands) was the chapter director at the time. He writes about his efforts to reconnect the BNI chapter with its essence. This article is in English and Dutch, the first time *AI Practitioner* has published an article in two languages.

Transient teams need to get up and running quickly. How can strength-based approaches contribute toward the success of these teams? Miriam Ricketts and Jim Willis (USA) write about their integration of Appreciative Inquiry and Experiential Learning.

What are the rules of thumb for an appreciative facilitator? Kemp van Ginkel (Netherlands) found five 'rules of thumb' in his practice as an experienced facilitator. One of his insights: 'The art of appreciative facilitation is the minimalist nature of it.'

We have an interview with one of the AI leaders of teams who has a lot of experience and really lives the philosophy of AI. Joep C. de Jong (Netherlands) explains his view on the essence of an AI leader of teams. We end with our conclusions about AI and team building – setting out the many ways in which the AI way of working with teams have brought new perspectives and a new effectiveness for many different types of teams and in many different circumstances.

We hope this will be a continuing dialogue and we will all add even more to this important application of Appreciative Inquiry.

### **Cora Reijerse and Ronald van Domburg**

Guest Editors, November 2010

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<http://home.earthlink.net/~chavele/tci.htm>



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# Team Effectiveness

## Key Ideas and Developments

### ABSTRACT

The purpose of this article is to provide a brief context and background about teams. Much has been written and debated about team effectiveness; this article is an overview of some of the key ideas and approaches regarding the theory and practice of teams.

'To understand organizations in affirmative terms is also to understand that the greatest obstacle in the way of group and organizational well being is the positive image, the affirmative projection that guides the group or the organization.'<sup>1</sup>

Your own experience working with groups and teams probably brings you to a similar conclusion. And, while we are all enriched and grounded in ways of thinking and behaving that give us positive affirmations, it is helpful to learn where our understanding of teams and groups started: to paraphrase Kierkegaard, we can live life forward and understand it in reverse.

### Team Effectiveness: Model of Essential and Enabling Conditions

#### What is a team? Why is teamwork important? What is a model of team development?

A team is a real work group, work teams have one or more tasks to perform, and work teams operate in a social system context. (Wageman, Nunes, Burrus and Hackman, 2008) From their extensive work, Wageman et al developed a model of three essential and three enabling conditions that seem to foster leadership team effectiveness. (See Figure 1 on page 11)

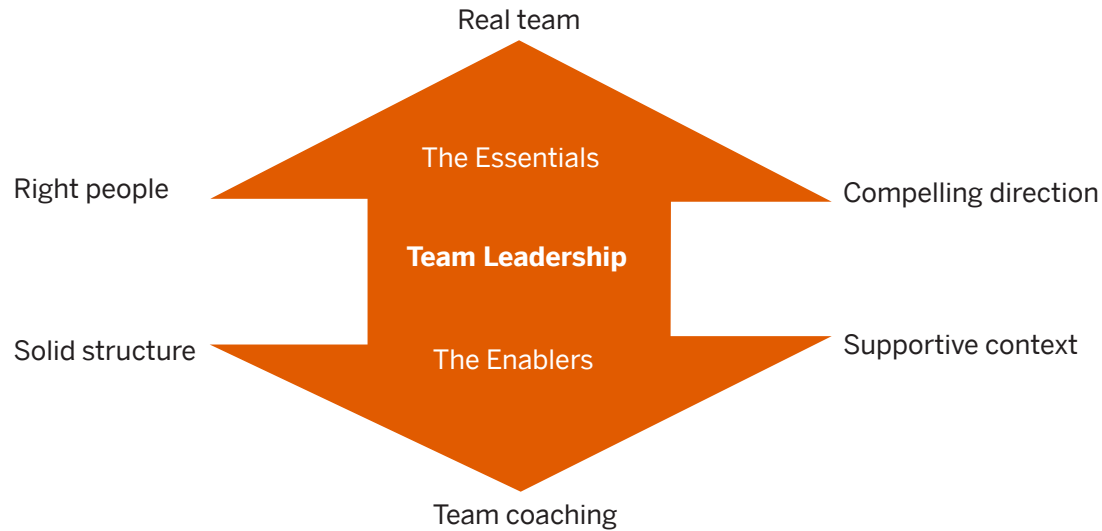
They concluded that: 'if it is not possible to establish the essential conditions for a senior leadership team, it is better not to form one at all'; but if you want to have a high-performing leadership team, you also need to invest in the three enabling conditions. While their research was conducted on senior leadership teams, the principles have some universal applicability to all teams.

Their six conditions are:

**1. A real team:** Their starting place is similar to Katzenbach and Smith's (1993) distinction between a team and a working group. For Wageman et al (2008), a real leadership team requires:

<sup>1</sup> Cooperrider, 2005, p. 55.

Figure 1: Six Conditions for Senior Leadership Team Effectiveness



a. Interdependency – this means it has collective work to do which requires members of the team to work together. They also stress ‘that sense of interdependence does not fade when the meeting ends. The leader and the members continue working together, seeking one another’s advice and support and holding one another accountable’. (Wageman, p. 51)

b. Boundedness – it needs to be clear who is in the team and who is not. Surprisingly, Wageman and her fellow researchers found that only 7% of their teams agreed when asked who was on their team! (p. 47)

c. A degree of stability – ‘Groups of people cannot become teams without stable membership for a reasonable period’. (p. 49) However, they also recognize that in today’s world, leadership teams and their CEOs are constantly changing, so ways of managing the leadership team’s inherent instability are critical.

**2. A compelling direction:** ‘The team’s purpose is not merely the sum of the individual member’s contributions, nor is it the purpose of the organization’ (p.17), and they suggest that every leadership team should ask itself the question: ‘What is the team for, that no other entity in the organization could accomplish?’

**3. The right people:** In highly effective leadership teams, the CEO does not just include all his direct reports, but selects additional team members who are committed to the direction and contributing to a collective leadership team that takes enterprise-wide responsibility and has the right capabilities and capacities. These include:

- a. The necessary skills and experience
- b. An executive leader self-image
- c. Conceptual thinking
- d. Empathy and integrity
- e. Team players

Selecting such people is only the first step. Being clear with them about what is expected in terms of contribution and behavior and how their particular characteristics can best be used to take the team forward is essential.

**4. A solid team structure:**

- a. being the right size (they recommend not more than eight or nine members)
- b. having a few clear team tasks that are strategic, that are mission critical, and that cannot be delegated
- c. clear norms and protocols about how the team should behave both in meetings and beyond
- d. and a sense of collective responsibility

**5. A supportive organizational context:** To be highly effective, the team needs to have the information, education, and material resources necessary to do its job and a performance management and reward structure that recognizes joint accountability and team contribution above and beyond individual and divisional performance.

**6. Competent team coaching:** 'The best teams are continually being coached'. Their research showed that all the CEOs of the companies studied had a strong external focus, but that the CEOs of the highest performing teams had an equally strong internal focus on the development of their team, both collectively and individually.

Almost all teams must do the following: set goals or priorities; analyze or allocate the way work is performed; examine the way a group is working; develop norms; make decisions and communicate; and examine the relationships among the people doing the work. (Dyer, 1987)

**Key aspects of team effectiveness – Concept of a team**

The concept of a team began with the Hawthorne studies and the conclusions from the research in 1930 by Elton Mayo, one of the original researchers. He wanted to investigate the effect that fatigue and monotony had on job productivity, and how to control them through variables such as temperature and humidity, rest breaks, and work hours, Mayo's discussion points out certain critical factors about the effectiveness of teams:

1. The boss had a personal interest in each person's achievement.
2. He took pride in the record of the group.
3. He helped the group work together to set its own conditions for work.
4. He faithfully posted feedback on performance.
5. The group took pride in its own achievements and had the satisfaction of outsiders showing interest in what they did.
6. The group did not feel they were being pressured to change.
7. Before changes were made, the group was consulted.
8. The group developed a sense of confidence and candor.<sup>2</sup>

Many of these original insights continue to be validated and interpreted in contemporary organizational consulting as characteristics of effective teams and team leadership.

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<sup>2</sup> Dyer, p. 9.

I believe that teams go through phases of equilibrium and disequilibrium, marking different stages in development, though there is a shift from 'I'-thinking to 'we'-thinking as the team matures.

### Insights into individual and interpersonal behavior in a group

Group work was a foundation of our knowledge about teams with the emergence of the Tavistock Institute of Human Relations in the United Kingdom and the National Training Labs (NTL) in Bethel, Maine. The Tavistock Institute was formally founded in 1947. Its early work brought together staff from different disciplines to find ways to apply psychoanalytic and open systems concepts to group and organization life. The first NTL programs were held the summer of 1947 in Bethel, Maine. (Beckhard, 1997) Laboratory training taught lessons about groups and provided some of the first insights into group dynamics. We learned that individual and interpersonal behavior could be developed and managed.

A well-known team model is Tuckman's (1965) stages of forming, norming, storming, and performing. Schutz (1958) wrote about how teams go through several stages, having to deal with issues of inclusion, of authority, then of intimacy. Tuckman's work is based on the work of Bion (1961) and the need for a group to work through a series of basic assumptions before it can become a properly functioning work group.

### Developing a team – emerging role of process consulting

Process consultation (Schein, 1988) offers support and help in the consulting profession which influences many approaches to team development. Process consultation is defined as: 'a set of activities on the part of the consultant that help the client to perceive, understand, and act upon the process events that occur in the client's environment in order to improve the situation as defined by the client.'<sup>3</sup>

In addition, Schein described phases and issues in building and maintaining a group. Phase 1 outlines problems entering a new group and self-oriented behavior; issues are identity, control and influence, needs and goals, and acceptance and intimacy (p. 41). The usual coping responses include 'tough' responses, tender responses, and withdrawal or denial responses, all of which are similar to Bion's assumptions. Together the other models discussed, these are outlined in Table 1, *Comparison of group and team models*, on page 14.

It is only when these stages have been successfully handled that the team can settle into its most productive work, with a climate of respect for each individual and without either dependency or rivalry in its relationship to the team leader. The earlier phases of forming, norming and storming will reappear as new people join or new phases in the life of the team inevitably come along.

### AI and Teams

Diana Whitney, Amanda Trosten-Bloom, Jay Cherney, and Ron Fry in *Appreciative Teambuilding* (2004), identified similar dimensions that affect team effectiveness: clear and shared goals or purpose, clear and shared roles/responsibilities, supportive and empowering relationships, clear and shared procedures, nurturing and challenging leadership, evolving energy and spirit, productivity and performance and complete, purposeful and uplifting communication.<sup>4</sup> Their book is full of useful AI questions that change the conversation about teams. The appreciative approach to team building is

<sup>3</sup> Schein, 1988, p. 11.

<sup>4</sup> Whitney et al, (2004) *Appreciative Teambuilding*, p. 5-6.

significant because numerous research studies have shown that AI focuses on developing strengths and has a positive effect on the overall health of the team. There are several other articles in this issue that discuss specific examples of appreciative teambuilding.

Table 1: Comparison of Group and Team Models

<b>Tuckman (1965) Team Stages</b>	<b>Schutz (1958) Key Dynamic Themes</b>	<b>Bion (1961) Basic Assumptions</b>	<b>Schein (1988) Process Consultation</b>
Forming	Inclusion/Exclusion	Dependency	Phase 1: Identity, Control, Power, Influence
Storming	Authority/Control	Fight/Flight	Individual Needs and Group Goals
Norming	Affection	Pairing	Acceptance and Intimacy
Performing		Work Group	Phase 2: Task and Group Maintenance Functions
			Task Functions: Building Internal Maintenance Functions
Mourning			Boundary Management Functions: Helping the Group to Learn

In my own research, I developed a model with stages or phases which is not linear.<sup>5</sup> I believe that teams go through phases of equilibrium and disequilibrium, marking different stages in development, though there is a shift from 'I'-thinking to 'we'-thinking as the team matures.

My experience working with teams is that the leader situationally adjusts their style as the team moves through the stages of development. Leaders who are skilled in the art of facilitative behaviors and Appreciative Inquiry are role models and examples for supporting the group with both their task and process focus. I believe that leaders have an increased role in the beginning of a team's life cycle and a decreasing presence as the team matures. Every one of 'my ideal team experiences', through the Appreciative Inquiry process, followed a very similar pattern where the team and the leader were able to reach an appropriate balance with roles and goal achievement.

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<sup>5</sup> More information on the model can be found on my website, [www.mariannetracy.com](http://www.mariannetracy.com).

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# Building a Team of Passionate Callers to Enrich Education in Croatia

**ABSTRACT**

This article is about a group of eight people joined by a common idea – a strong call to enrich education in Croatia so that it motivates leadership and empowers children. Through use of the philosophy and methodology of Appreciative Inquiry, this informal group of people has gradually developed into the core team of a potential national movement.

**Appreciative Inquiry as a guiding principle**

Croatian reality is not usually organized around such forms of conversation. Our team is a rare example of alternative approaches to finding sustainable solutions. In order to describe the process of building and engaging our team, this article examines our group process with reference to specific dimensions of Chaordic design and presents our generative relationship using the STAR model.

We decided to apply AI principles from the very beginning. We started from the assumption that everybody has good experiences to learn from, followed by the fact that what people focus on becomes their reality. We also had an appreciation of valuing our differences and were aware that the act of asking questions starts change. The team focused their discussions around positive examples of education, building common vision and sharing dreams, rather than analyzing the current situation and proposing solutions.

**Chaordic dimensions within an AI framework**

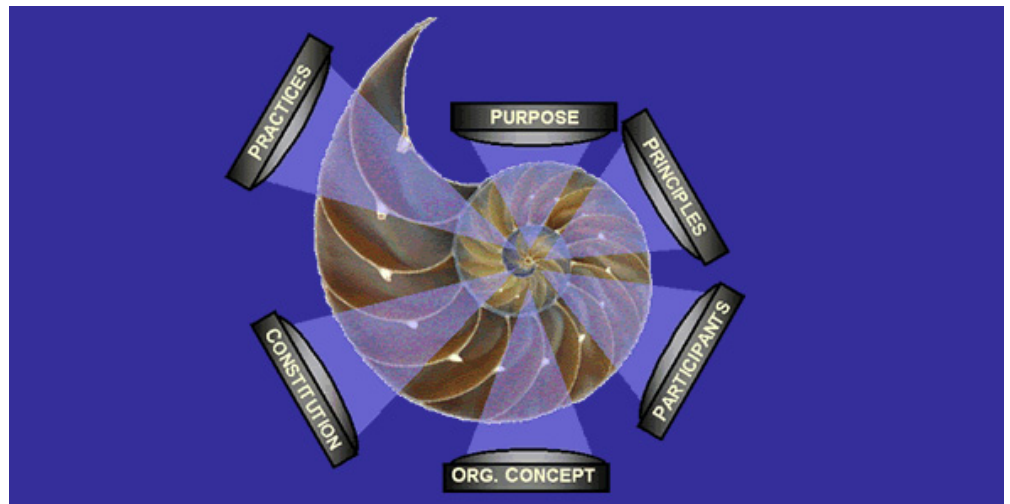
The article describes the development of generative relationships among the members of our group. A generative relationship 'produces new sources of value which cannot be foreseen in advance.' (Lane and Maxfield, 1996)

The group started on the edge of chaos and order, where common desire and vaguely articulated guiding question meet reality. We used knowledge acquired in the Art of Hosting workshop, where most of the members met. [The] 'Chaordic path between chaos and order leads us to the new; to collective learning and real-time innovation.'<sup>1</sup>

The purpose, principles and participants are discussed within the context of the team building process through Chaordic dimensions. Although the design and delivery phase have been created within AI framework, the remaining dimensions

<sup>1</sup> Taken from course materials.

Figure 1: Chaordic shell from [http://www.chaordic.org/cd\\_process\\_activities.html](http://www.chaordic.org/cd_process_activities.html)



of Chaordic design (organizational concept, constitution and practices) have not yet been implemented.

### Participants

The idea for the project began at the Art of Hosting three days workshop and training held in February 2010. The Art of Hosting is a 'set of practices for facilitating group conversations of all sizes, supported by principles that:

- Maximize collective intelligence
- Welcome and listen to diverse viewpoints
- Maximize participation and civility
- Transform conflict into creative cooperation<sup>2</sup>

During the course of practising ProActive café methodology, the topic of education for better leadership emerged. One of the participants was inspired to suggest the creation of a group. Fellow participants who shared the same enthusiasm created a team. A couple of others joined afterwards.

The team is made up of highly educated people aged from 31 and 42, six women and two men. They vary in educational background and professional experiences, but share a common understanding of the need to change guiding educational values in Croatia.

In the first meeting, eight of us undertook an appreciative inquiry of our best experiences of working in teams, and how those experiences realized our potential in a motivating environment. Building a collective mind-map increased group energy in the harvesting phase. Shared stories that inspired us helped common understanding by rapidly building mutual trust and bonding so that we could work together. For example, we found that common ground and an AI approach helped us to go quickly from 'the theme attracted me to come here' to 'I feel confident that together we will be creating something that matters'. The process, although created by few team members, follows 'best team' approach described by Bushe (2010).

<sup>2</sup> taken from <http://www.artofhosting.org/home/> visited August 2010



The Art of Hosting training, February 2010

### Purpose

The purpose of our group and work is defined by the question 'How can we create an educational system that empowers children and motivates leadership?'

The core purpose was defined in the first meeting and recorded in the meeting note:

Zagreb, 4.3.2010

Purpose:

- Initiate change in the educational system in Croatia
- Create a network of people who can design and implement the change in the educational system

*The core purpose of our group project is to motivate leadership and develop individuals as well as looking for organizational potential. The project is geared towards establishing new possibilities which are more purposeful for both adults and children. The ultimate goal is to help create more fulfilling lives in a better world. The group is eager to cooperate with multiple stakeholders in our existing educational system, but also ready to initiate new forms and organizations for life-long personal development.*

During this period, our team process was moving from the discovery and dream to the design phase.

### Principles

Cockell (2010) describes the current dynamics of our core team development well: 'Critical appreciative processes combine the appreciative and the critical. These processes could enhance the possibility of magic, the transformation that happens when groups of people collaborate effectively by being interconnected and authentic, present, with each other. The group transforms to be more than the individuals put together and/or the group process aggrandizes the learning.'

The 'making magic' during the divergence phase around our common purpose is so enjoyable, that the group has been putting lots of time and energy in extensive talking, sharing stories and dreams.

Zagreb, 15.4.2010

*'People, I loved our dance between chaos and order, control and flexibility... letting go, loosening up, releasing ... Anyway ... I have plenty to say about our today's meeting ... several personal insights, many ideas, ... and all of it now being integrated in my brain and my body and dreams will do their role too ... so I am convinced that something good will be born out of it ... if a baby is going to be born in my place or any of your places, I believe that everyone in the family will accept the newborn ... or maybe we will bring to this world our collaborative baby (so you know, this is quite possible and will be completely normal in the future!)' [Excerpt from meeting notes]*

It is important to note that although the group discusses principles such as creating our space in virtual reality as a substitute for a physical location and regular physical meetings, no concrete action in this direction has been taken yet.

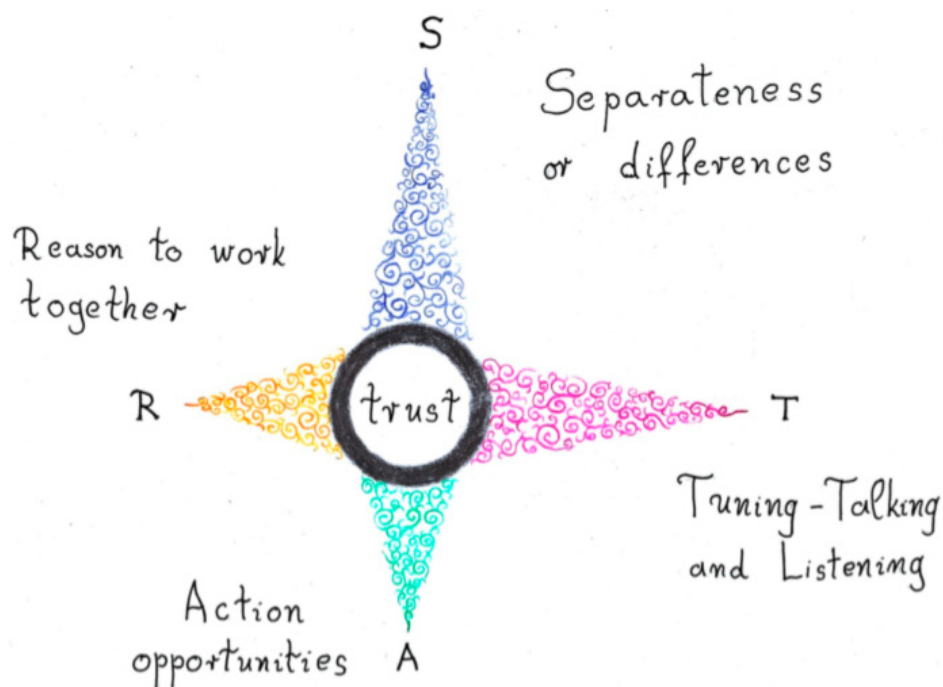
Also, despite the fact that meeting notes are regularly distributed among team members, they typically represent shared reflections and excitement about building common vision of what might be. Even when action points or decisions are recorded, there is no follow up activity.

Rijeka, 10.5.2010

*Conclusion: volunteering + smart (and other similar associations) = good partnership for action. The next point from the followup flipchart: pilot project – to go or not to go into such a project?*

*Yes, we all say, but with awareness of the limited influence and benefits of such work. Final conclusion: definitely provide support for such projects! [Excerpt from meeting notes]*

The STAR model representing the team's generative relationships



Following the Zimmerman STAR representation of generative relationships, the team has developed strong talking capacity, with a huge potential for action. STAR is:

S – separateness or differences between the group members ensure wide and different perspectives.

T - long and intensive tuning – talking and listening 'dates' allow group members to exchange, reflect and openly and constructively challenge each other's assumptions and standpoints.

A – action, co-creation of the new something, has not been taken thus far.

R – reason to work together and being aligned in a project provide a room to talk and learn together. Action might happen in newly initiated groups organized around core team and coordinated with the common vision.



The STAR model visually and clearly reflects the state of the group's generative relationship and the challenge to the group for further development.

### Organizational concept

Recently, the group has started drafting general organizational concept by detecting the role of the core team in wider context: '...we as a group don't want to be mainly involved just in one venture/activity/business – we think we have to "host the core process" to be "hosts of the hosts". That means that we, as a group, initiate and foster joint platforms (network, summits, web-portal, hostings) and keep some kind of overview of main activities/ventures/businesses/whatever, that make important impacts on the education system in Croatia (being networked in what important is going on a global level) – it includes us being individually involved in some particular ventures/projects, and have some hands-on experience.' [Excerpt from an email addressed to a potential international partner, July 2010]

### Conclusion

For the time being, we have experienced the crystallization of a few ideas from the chaos. This opening up and divergent phase took some time to be accepted. After a couple of meetings, the initial frustration with the lack of clear purpose has been replaced with the feeling of being blessed to be able to participate, explore and dream together. Our group potential is drawn from our individual purposes, not from any outside interest or being in anybody's service.

In the next few months, the group will be challenged with the convergent phase, when new solutions will emerge and realization of new ideas will require facing the real world with various stakeholders. This will potentially bring some new insights into the AI summit methodology and further strengthen the relevance of this case.

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# Engaging 'the Other' in Dialogic Work in a Nursing Home

**ABSTRACT**

People who provide care and nurturance for society's vulnerable older people deserve a high quality, inclusive workplace. Invited to help a 30-year old, large, unionized, urban nursing home to address what senior management described as a 'we-they' conflict, we guided our client through a whole-system team-based intervention designed to foster an inclusive workplace that valued and provided voice for different perspectives, roles and cultural identities.

**Naming and framing through discovery**

Our client solicited help from consultants in response to a racial incident that ignited issues between management and the union. Thus, at the outset, the 'problem' involved a clash among complex identities: union/management; African American/white; leadership/line staff. The senior leadership team solicited consultants for proposals to help with 'diversity training'. Based on our experience, we saw that the incident was symptomatic of more complex issues. As a result, ICW Consulting Group offered a strength-based systemic approach which explored the positive core of personal, positional and cultural diversity.<sup>1</sup>

In our discovery phase, we facilitated conversations that explored what supported compassionate care of the residents and inspired collaboration among people who worked in the home. From these conversations, we identified four over-arching goals:

- Articulating a shared history
- Creating venues for engaging different perspectives
- Expanding internal partnership
- Strengthening and nurturing social networks promoting quality of care and quality of work life

People had different versions of the history of the nursing home, depending on when they started working there, their functional position and level as well as race and social class. For example, a majority of people of color shared stories

<sup>1</sup> We would like to make a special acknowledgement to the consulting team, each of whom contributed to this article. We want to acknowledge Anne Litwin for her articulation of the personal, positional and cultural distinctions of forms of diversity.

People had different versions of the history of the nursing home depending on when they started working there, their functional position and level as well as race, and social class.

that suggested a long history of racial inequities in employment selection, promotion opportunity and differential treatment by supervisors. The leadership team expressed different perspectives. The core leadership team, which consisted of a majority of white women, did not share in this narrative, but were willing to listen to a different perspective. The medical staff, which consisted of two African American men, and the head of human resources, a Latino woman, were aware of other perspectives, as they were often confidants for disgruntled employees.

Given the force of the divisive narratives around race, and what we heard regarding these different narratives around position and function, we began by facilitating conversations among the leadership team to articulate the overarching vision and goals. Second, we expanded the conversations to include the senior management. Once the leadership and senior management were aligned, we convened a session that included leadership and senior management with each of the ten unit teams.

### **Leveraging the best of the consulting team in team development**

Each member of the consulting team brought a unique approach to our project that was ignited in the way we related together. We were intentional in how we modeled how we related with each other in ways that invited the teams to do the same. Specifically, some of us had stories from our work with unions. Others had stories that resonated with the personal lives of some of the employees. All of us had a posture of curiosity in meeting the people in the organization, listening to their stories of what life was like for them and exploring the source of their passion for their work. We each had great value, respect and appreciation for each other – and also modeled that for the people we worked with.

### **Articulating a shared history – creating a new future: tools and methods**

One of the first activities we offered the group was a process we borrowed from Future Search design: The Timeline Activity. In a session with the senior leadership team, we created a shared narrative of the collective experience from 1970 to the present. We then carried this narrative over to each of the sessions with the unit teams – twelve in total. We asked the Executive Director [ED] and the Medical Director [MD] to tell the story together. Each session we invited people to add something from their experience along the way. The narrative expanded as the ED and the MD incorporated the successive stories into their narrative each session.

As a consequence of telling the history, many people felt they had a better understanding of and share in the 'genesis story' of their place of work and what they lived, untold stories were that informed leaderships' decisions, policies and practices.

The timeline became a storyboard that was displayed at each leadership and Unit Team Session. People had the opportunity to place themselves in the history of the nursing home and expand the story, amplified by their voices.

### **Expanding internal partnerships through unit team sessions**

We learned from the discovery phase that employees did not have a meaningful venue to talk about issues across functions. For example, nursing assistants and people from dietary or nurses talking with people from recreation therapy. We arranged to have two-day sessions where all the associates related to one

Promoting a new narrative and new forms of discourse for employees proved to be an important strategy in developing stronger social networks and better 'job fit'.

unit could come together and get to know each other. The design for the session included the opportunity to ask questions of each other and share what made them proud about the role they played in patient care – by function.

One of the tools provided to team members was a small journal. We asked them to capture thoughts, feelings, and words they felt important for them to remember or share with each other. This method of writing provided a way to risk on the page what needed to be said aloud, as well as a reflective space to process personal experiences. Most of the participants held onto the journals throughout the intervention, and regularly referred back to notes and thoughts written as a way to clearly communicate messages. In fact, people often stopped us in the hallways and waved their journals to show us that they continued to use them as a tool and resource.

The team sessions promoted cross-functional sharing that continued beyond the two-day sessions. In those sessions, we invited people to create pictures depicting the story they lived by their function as well as what they imagined life was like for others' functions, as well as for the residents. These depictions prompted dialogues across groups during which people listened to each other's different perspectives. Where formerly people had made up stories about others when they did not understand their behavior, now they asked questions and, in so doing, clarified misunderstandings. By strengthening the social network links both across and within the units, they created new social networks across functions. By introducing the framework of narrative and story, they were able to look at their stories as one possibility and be open to narrating new possible stories.

Building on their stories of themselves and each other, we designed an activity where people were able to imagine creative collaboration and caring service. These principles then informed recommendations that were shared with the senior leadership team and the inclusion task team.

### **Addressing the issues: promoting attendance and job commitment**

We took the opportunity to track design principles that were persistent across the sessions. One of the structural impediments to team development was inconsistent attendance and attrition. We created a cross-level, interdisciplinary task team that met twice a month to explore how we could promote the desire to come to work and commitment to the job. This team identified structural and alignment issues related to job commitment. Team members conducted interviews with people in their units to explore what would help support job commitment. Together with the team, the consultants explored different facets: job fit, the alignment between values, sense of self, need for accomplishment with the work and stated values of the organization, and social networks.

Three important strategies the task team worked on were:

- Developing a new orientation program which emphasized welcoming new employees and pairing them with mentors and a 'social buddies' to facilitate entering a new work space
- Initiating a coaching approach to supervising
- Identifying what promotes attendance and job commitment

People who provide care and nurturance for society's vulnerable older people deserve a high quality, inclusive workplace.

The task team continues to meet on its own to continue this work.

### Addressing negative forces and strong emotions

Challenges needed to be addressed throughout the process – challenges that were figurative minefields. First, the union and management mistrusted each other. When we first began our engagement, the union refused to meet with us. We were perceived to be a tool of management. A year into our intervention, the union leader sought us out to tell us about the positive reviews she was hearing about the process. When the budget crisis hit (nationally, at the state level and at the city level), the union worked with the executive team to revise benefits. The increased sense of teamwork and communication transformed union–management relationships.

Another challenge was the underlying tension between the ED and the MD. They had been working together for the nearly twenty years of the nursing home's existence. During that time, divergent narratives about their respective roles in sustaining operations and supporting each other's positions had developed. We developed a paired coaching relationship, with two of the consultants working with the two leaders and convening shared sessions. The two were able to go so far as to share the stories they were carrying.

As a team, we learned how important it was to both create an empathic presence with our client, validating their experience of the challenges of sustained change in complex relationships with deeply embedded histories of mistrust, and inspiring hope for new ways of relating with one another. Holding this level of complexity requires deep trust among the consulting team and an ongoing commitment to supporting one another as issues manifest in the client-consultant relationship.

### Continued challenges

The continuous pressure of financial instability due to unrealistic Medicaid reimbursement rates is an ongoing external pressure on this team. As budgetary constraints continue to foster a culture of scarcity, habitual forms of framing tensions will persist. Our hope is that the meta-narrative of collaborative teams we have seeded will be sustained despite these challenges.

The question we end with addresses what level of system we were able to impact. Some individuals were able to build some bridges and form better collaborations. Some groups in the organization expanded their stories of each other and themselves in relationships. The higher the level of the system that we brought to the surface, the more challenging it was to sustain trust. Yet, promoting a new narrative and new forms of discourse for employees proved to be an important strategy in developing stronger social networks and better 'job fit'. These developments are critical to fostering a better quality of work life that ultimately drives better quality of care for society's vulnerable and deserving elders.

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# How to Conquer Conflict with Appreciative Conversation

## ABSTRACT

How do you approach difficult topics in a way that will help you avoid the roller coaster feeling and instead have you leaving the conversation more relaxed than you imagined possible? Especially one involving one of the toughest topics of all, religion.

Have you ever been in conversation with a small group of people around a difficult topic? How did the conversation make you feel? Did your stomach feel like you just got off a roller coaster?

Now picture your best day at the beach, or wherever else you find relaxing. What is the feeling like now? Would you like to experience more conversations that leave you relaxed and refreshed instead of re-fried?

In this article, you will learn how to approach difficult topics in a way that will help you avoid the roller coaster feeling and instead have you leaving the conversation more relaxed than you imagined possible. At least that's how it was for me after applying the method to one of the toughest topics of all, religion.

## Creating a team

But first, let's look at the events that led up to our conversation. I believe that getting to know yourself and your team members is the foundation of creating a high-functioning learning group. For several years, I taught a class for computer majors that took this approach to helping them collaborate and communicate more effectively.

It was a fun, interesting time, until one day in the spring of 2003. We had begun with Appreciative Inquiry interviews around learning experiences. Then we did the Gemstones personality instrument.<sup>1</sup> To help elicit everyone's goals for themselves and for our time together, we each took the TruValues and NeedLess personal coaching instruments. As the last step in the self-discovery process, we had a fun afternoon cutting out magazine pictures that represented each person's vision for themselves and our time together. These pictures were pasted on the same flip chart sheets on which we had earlier recorded each of our Gemstones, values and needs. Then things went downhill fast.

<sup>1</sup> similar to the Myers-Briggs Type Indicator

The practice afternoon began outside under the trees with all of us answering a set of questions about 'undiscussables' adapted from Robert Quinn's book, *Deep Change*.

### Going from nice to nasty instantaneously

When everyone began to share their values and visions, we started to come together as a team. The sharing was very personal, and it was interesting and heart warming to hear, especially since the group contained some very shy people. Then someone shared about his Christian faith and stated, 'I used to debate the truth, but now that I have the "Truth", I no longer debate it'. Although other students had shared similar values around their faith, no one had made such a strong claim to having the 'Truth'.

The class instantly became polarized based mainly on people's past positive and negative religious experiences.

In the next few weeks, our time together had an unmistakably unsettling tone to it. People would disruptively speak to their neighbors when someone from the 'other side' was speaking. One student openly expressed his dislike for the other student's claim to having the 'Truth'. This student went on to explain about his bad experience with religion which helped me to understand the picture more fully.

### Deepening our conversation

Something had to be done, so I decided to facilitate a conversation about religious differences. This exercise took place over two two-and-a-half hour sessions one week apart. The goal of the first session was to help everyone, myself included, to be more aware of the thoughts and emotions behind our beliefs and actions, and to become more curious and appreciative of others' points of view.

The practice afternoon began outside under the trees with all of us answering a set of questions about 'undiscussables' adapted from Robert Quinn's book, *Deep Change*. As a group, we shared our answers, talked about what leads to 'undiscussables' and their costs, and our group's 'undiscussables'. This laid the groundwork for my introduction about our large 'undiscussable' of religious differences.

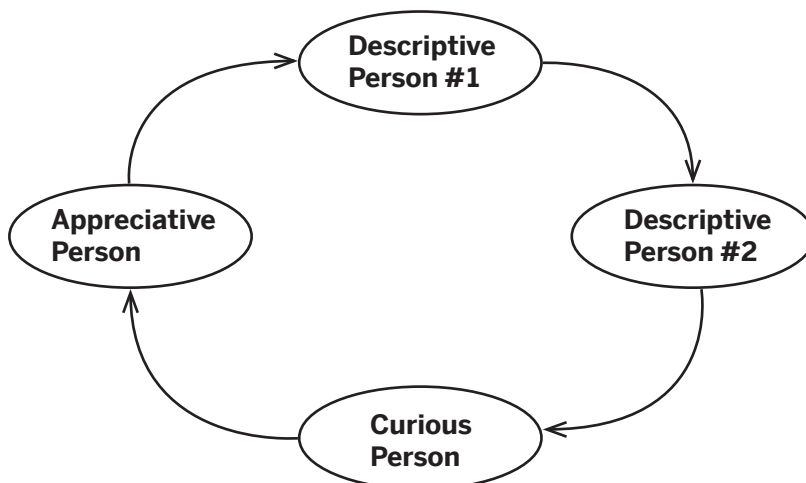
I had also created some exercises that were inspired by Gervase Bushe's book, *Clear Leadership* (2009). I began by introducing the aware, descriptive, curious and appreciative selves that Bushe talks about. We then broke into pairs and began practicing these roles for the next week's conversation about religious beliefs.

Everyone learned how to be more aware and descriptive of their thoughts, emotions and experiences. Just as importantly, we practiced being more curious about each other's experiences and listening more deeply. Lastly, and perhaps most important, we all got back together in a circle and learned to be more appreciative by sharing what we were each grateful for. This helped to end the day on an up note.

### Conversing in a new way

The second week, we began with a highly structured practice conversation about the war in Iraq. I asked for two volunteers to play the role of the descriptive self and express their views either for or against the war. We also had volunteers playing the aware, curious and appreciative selves. My role was mainly to gently nudge people back into their roles, especially since a week had transpired since

Figure 1: The inner circle:  
Four volunteers participated as shown.  
The remaining people sat around this  
inner circle in a loose fishbowl style.



our practice. This event was somewhat successful, although by no means a breakthrough. To improve the conversation, using a talking stick was suggested. All I could find was a soft, colorful ball about the size of a softball. It turned out to be perfect.

For the conversation around religious differences, the role of the aware self was omitted because it confused the person playing it and didn't seem to add to the conversation. A total of four new volunteers to participate in this exercise as shown in Figure 1. The remaining people sat around this inner circle in a loose fishbowl style.

Descriptive Person #1 had strong Christian beliefs. Descriptive Person #2 was pretty much open to a wide range of views and beliefs. The Curious Person inquired into the statements made by the descriptive people. The Appreciative Person made appreciative comments about one or both of the descriptive people's statements.

One of the problems that arose in the practice round was staying on track around the circle. The 'talking ball' helped people go clockwise around the circle, and stopped back and forth conversation between the participants. This had the added benefit of helping everyone stay in their particular roles. In addition, people felt more comfortable in the various roles after witnessing the practice round.

### Shifting back to nice almost instantaneously

Amazingly, the conversation had not just a calm tone, but was one of the most peaceful afternoons I have ever experienced. After the conversation had gone around the circle many times, the participants in the inner circle began to toss the talking ball to the observers in the outer circle; inviting more and more people into the conversation.

At one point, the ball went to the original person who claimed to have the 'Truth'. He quoted some passages about non-believers from the Bible. I was concerned that we might be right back where we had started. I asked the group which role should speak next and the consensus was the appreciative role. This immediately defused the situation and our afternoon of peace, love and understanding continued.

The main factor was the role played by the appreciative person. Without this role, the tone of the conversation would not have shifted.

### Demonstrating lasting results

The conflict in our group disappeared almost as quickly as it had first appeared, with not even a hint of contention in the following weeks. Later in the term, most of the participants went to a 'low ropes' challenge course.<sup>2</sup>

Instead of being a teambuilding event, it served to demonstrate just how much of a team this once argumentative group had become. No one fought for their idea or shot down the ideas of others. They just laid out ideas in parallel and then somehow picked one to try. They had become one as a team.

### Ensuring success

There were several factors that worked holistically for our success:

- The first week's session helped people begin to listen more deeply.
- The practice conversation around the war in Iraq helped people become familiar with the roles.
- The structure helped slow down the conversation by providing natural gaps.
- The tight roles that people played and the reinforcement of continuing around the circle eliminated traditional advocacy and the possible escalation of emotions.
- The 'talking ball' reinforced the structure and eventually allowed others to be included.
- In addition to slowing the conversation down, the curious person also balanced the advocacy with inquiry. I believe that the inquiry was more genuine since it was from a more neutral third party than if the advocates attempted to be more inquisitive.
- In the beginning, only four people participated. This helped eliminate simultaneous conversations and confusion.
- The main factor was the role played by the appreciative person. Without this role, the tone of the conversation would not have shifted. Having them speak after the curious person allowed the descriptive people time to park any emotional reaction they may have had to an inquiry. They also got an appreciative pat on the back before responding. How often does that happen in a conversation?
- My role as a facilitator, while different from the mostly hands-off approach generally recommended, actually helped create more of a team environment. At the end of the term, one participant said, 'Thanks for being a part of our group more than a leader of it. I think we learned a lot more about being in a team that way.'
- Being outside sitting in the shade on the grass on a pleasant day also helped to lessen tensions.

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<sup>2</sup> Low ropes courses consist of a series of real and imaginary obstacles designed to challenge groups and individuals to work together to accomplish a task.

### Looking back

I remember feeling a great sense of relief after we were done. But what really made our conversation so meaningful for me was seeing the group shift from being contentious to beginning to care about each other. That afternoon we had one of those rare conversations that leave you feeling at peace, yet at the same time incredibly excited about the success. I'm always trying new ideas for facilitating change based around Appreciative Inquiry, improvisation and team building exercises, and it was thrilling to see our experiment work in such a dramatic fashion.

### Looking forward

The intervening week was too long to remember what the various roles were, so more closely integrating the practice session would be recommended. As a minor point, it may help if the participants select the object to control the conversation. This provides them with some degree of choice as they learn to converse in a very different way. Lastly, it would be interesting to look at the possibilities for carrying on such a conversation in the wired world of today. What would such a conversation look like if it were not face-to-face? What additional support would be needed?

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# Givers Gain

## How a BNI Chapter Reconnected With its Essence

### ABSTRACT

This article is an account of the process our BNI chapter went through from September 2009 up to March 2010. In this period we went through a difficult time. In my role as chapter director I purposefully made use of some of the principles and instruments of Appreciative Inquiry and other intervention methods to create the desired future. What was the result of these interventions? How were they implemented? What did I learn? This article addresses these questions.

Many thanks to James Afolalu for translating this article from Dutch to English.

Business Network International (BNI) is a worldwide organization organized into local chapters. Each chapter consists of representatives of different companies meeting on a weekly basis to generate referrals for each other. Their business philosophy is 'givers gain'; the more you give to others, the more you will receive.

A BNI chapter is not a team. It is a group of individuals in which each member has their own interests and share a common interest; the more successful the chapter as a whole, the more individual members benefit from that success. After being a member of a Dutch chapter for some years, I was approached in September 2009 to assume the role of chapter director.

This article is an account of the process we went through from September 2009 up to March 2010. I started this period doubting whether I should take on this challenge, given where the chapter was at the time. Once our leadership team was fully formed we went on to design the future we wanted. I purposefully made use of some of the principles and instruments of Appreciative Inquiry and other intervention methods.

What was the result of these interventions? How were they implemented? Were the effects visible? What did not work so well? What did I learn? This article addresses these questions. But let's start at the beginning: the situation in autumn of 2009.

### Downward Spiral

Our chapter was not doing well at the time I was approached to assume directorship for six months. Membership had fallen to 16, the number of referrals was at an all-time low, and we were unable to motivate enough people to visit or join our chapter. Also, a number of conflicts between members were still simmering in the background. Although the atmosphere was still good, I felt we were on a precipice as a chapter as 16 members is too few to keep a group viable. A chapter needs a minimum of 20 members to generate sufficient



referrals and to make membership worthwhile for both existing and prospective members.

### Defining clear objectives

The first thing we did – and this is common for every six months leadership term – was to set clear objectives for the term. We formulated four distinct objectives: increase membership to 25 (it was 16), bring referrals up to 0.5 per member per week (it was 0.34), increase the number of visiting companies to four a week (it was three) and retain 80% of our current members (retention was 37%). Four challenging goals, all necessary to ensure our survival as a chapter.

### In search of the life-giving forces of the chapter

At the start of my term as a chapter director, I faced the choice of where to direct my energy and attention. I felt that my sense of urgency was not shared by everyone, but at the same time it did not seem appropriate to preach imminent catastrophe if something did not shift right away. I chose to focus on the life-giving forces of our chapter: what were our strengths, why did we still exist and what caused members to happily attend the weekly meetings?

I discovered three aspects which were outstanding in our chapter:

We had a great atmosphere

Members were always there

The hospitality we displayed to our guests

This third aspect was always noted by visitors to our chapter meetings. These positive aspects were not commonly expressed, but by doing so, we reinforced each other's positive qualities, while working on our weaknesses.

### Creative presentations

A BNI member gets an opportunity each week to present their business activities and the clients they are looking for in 60 seconds. How do you ensure the presentations stay lively and interesting? How do you prevent monotony, resulting in people mechanically reciting their presentations without soul or inspiration? We actively used different stimuli to address this.

For example we requested members to present without words, using pantomime. Another time we asked them to present their business while making use of a physical object of their choosing. We used presentations set in verse to enliven the section. We organized a 'bring a replacement for yourself'-day, where the member's guest did their host's business presentation. This stimulated the creative juices of the members and the meetings were laced with liveliness and humor.

### Telephone calls with a personal touch

Not everything is expressed openly in a BNI meeting. There are different types of emotions at play in a group like this. For us the key question was: how do we find out what issues our members have which are not expressed? What motivates people to continue in the group or stop coming? What doubts exist in the minds and hearts of our members and what can we do about them? What are the aspects they are dissatisfied with?

To get a fuller picture I decided to personally call all the members. In this telephone call, I focused not only on those who were dissatisfied, but also on the member's positive experiences. What inspires them to continue? What are their

The BNI's business philosophy is 'givers gain'; the more you give to others, the more you will receive.



most positive experiences with the chapter? What are their most memorable stories? How could I be of help to them as a chapter director?

The telephone call was much appreciated by the members. What members liked most was the personal attention they received and the opportunity to fully express what they felt.

### Chapter networking with appreciative dialogue

We organize networking events with chapter members every six months. This time we agreed to catch two birds with one stone and combine the pleasant with the useful: I gave our members a summary of the telephone inquiry, after which we had an appreciative dialogue where we focused on reinforcing our strengths and minimizing our weaknesses. It was an inspiring meeting and the energy was visibly strengthened.

### Appreciating successes

The book *The Carrot Principle* talks about recognizing achievements and efforts of employees. This is not common in many organizations. An employee of a big corporation expressed it this way: 'When I make a mistake it will be acknowledged 100% of the time, when I make a valuable contribution it will not be acknowledged 99% of the time'. Elton and Gostick passionately argue for immediate and public expressions of appreciation, coupled with an appropriate remuneration. We started consciously applying this principle in our chapter. The effects were amazing: for the members, because their efforts were publicly acknowledged; and for the leadership team, because it is satisfying to express and share appreciation with others

### What did we achieve?

By the end of our term in March 2010, our chapter was out of the danger zone. We were again at 20 members (though not the desired 25), the number of referrals had increased to 0.5 per member per week and the number of membership renewals had increased significantly as well. We had covered a lot of ground, but the work was not complete. The baton passed to the next leadership team, who could build on our accomplishments in this period.

### In appreciative retrospect

AI talks about the life-giving forces of an organization. By connecting with these life-giving forces, an organization can revive itself, grow and develop yet again.

AI talks about the life-giving forces of an organization. By connecting with these life-giving forces, an organization can revive itself, grow and develop yet again.

Looking at my time as chapter director, my most significant contributions were to assist members with several tools to reconnect and strengthen the life-giving forces of their chapter, thereby fostering inspiration and trust by:

- Inspiring goals that create focus
- Defining clearly what made our chapter unique
- Bringing playfulness and liveliness to our 60 second presentations
- Giving one on one attention to each member
- Conversing openly about member's concerns and how we can best deal with them
- Appreciating explicitly the successes and individual contributions

As a consultant, I am usually in the role of an advisor or facilitator. In this instance I was the leader. It makes a huge difference. As chapter director I felt the pressure to turn things around. Luckily I didn't need to do it alone: we had a leadership team which acted cohesively and other BNI members also contributed to our success. But the feeling of being really responsible is an entirely different one. A valuable experience! We did not follow a complete AI cycle, but worked mostly from the AI philosophy.

It was an exciting period and once the different actions we took started yielding very positive results, I felt grateful to see that the philosophy of Appreciative Inquiry can also create success within the context of a BNI chapter.

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## What's in AIP February 2011

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### Positive and Appreciative Leadership

**Guest editors: Sarah Lewis and Lesley Moore**

This issue will focus on engaging, stimulating, challenging, unexpected, surprising, oblique, inspiring and quirky accounts of Positive and Appreciative Leadership. We are especially interested in stories that go beyond the commonly used '5D' model, accounts that take the AI philosophy and approach and apply it in emerging and unfolding contexts.

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# Geven loont

## hoe een BNI chapter zichzelf weer terugvond

**ABSTRACT**

Dit artikel is een weergave van het proces waar ons BNI chapter doorheen ging in de periode september 2009 tot maart 2010. Dit was een moeilijke tijd. In mijn rol als chapter directeur maakte ik bewust gebruik van enkele principes en instrumenten van Appreciative Inquiry en andere interventie methodes, om de gewenste toekomst te creëren. Wat was het resultaat van deze interventies? Hoe werden zij geïmplementeerd? Wat heb ik ervan geleerd? Dit artikel geeft antwoord op deze vragen.

Many thanks to James Afolalu for translating this article from Dutch to English.

BNI (Business Network International) is een wereldwijde organisatie. Zij is onderverdeeld in lokale chapters. Ieder chapter bestaat uit (vertegenwoordigers van) organisaties, die wekelijks bij elkaar komen met als doel de leden aan aanbevelingen te helpen. De filosofie luidt 'givers gain': hoe meer jij anderen geeft, hoe meer je terugontvangt.

Een BNI chapter is geen team. Het is een groep mensen. Ieder lid heeft zijn eigen belangen en er is ook een gemeenschappelijk belang: hoe succesvoller een chapter is om de leden aan aanbevelingen te helpen, hoe meer de individuele leden in dat succes kunnen delen.

Ik ben al enkele jaren lid van een chapter in Nederland en in september 2009 werd ik gevraagd voor een half jaar de rol van chapterdirecteur op me te nemen.

Dit artikel is een weergave van het proces dat wij met het chapter doorlopen hebben van september 09 tot maart 10. Ik start met mijn twijfel of ik deze uitdaging wel op moest pakken, gezien de situatie waar het chapter in zat. Toen ons nieuwe bestuur eenmaal benoemd was, zijn we voortvarend aan de slag gegaan om gezamenlijk de toekomst vorm te geven. Hierbij heb ik bewust gebruik gemaakt van enkele principes en instrumenten van AI, naast een aantal andere interventies.

Wat was het effect van deze interventies? Hoe werd erop gereageerd? Waren er zichtbare effecten? Wat werkte minder goed? Wat heb ik ervan geleerd? Dit zijn zo de vragen die in dit artikel aan de orde zullen komen. Maar laten we beginnen bij het begin: hoe was de situatie in najaar 2009?

**Neerwaartse spiraal**

Op het moment dat ik de vraag kreeg om een half jaar chapterdirecteur te worden, ging het niet goed met ons chapter. Het aantal leden was gedaald tot 16, het aantal referrals (aanbevelingen) was minimaal en we slaagden er niet



in voldoende bezoekers en nieuwe leden aan te trekken. Er waren ook enkele conflicten geweest tussen individuele leden die ondergronds doorsijpelden. Hoewel de sfeer nog goed was, stonden we naar mijn inschatting aan de rand van de afgrond. Een chapter van 16 leden heeft geen bestaansrecht. Er zijn minimaal 20 leden nodig om voldoende aanbevelingen te kunnen genereren waardoor het aantrekkelijk blijft voor leden om lid te blijven en voor anderen om zich aan te sluiten.

### Duidelijke doelen stellen

Het eerste wat we deden – en wat so wie so ieder half jaar gebeurt – is enkele duidelijke doelen stellen. Voor deze periode formuleerden we vier doelen: aantal leden naar 25 (was 16); aantal referrals 0,5 per lid per week (was 0,34), aantal bezoekers 4 per week (was 3) en behoud huidige leden 80% (was 37%). Vier uitdagende doelen, nodig om ons bestaansrecht zeker te stellen. Het stellen van duidelijke doelen is overigens een succesfactor voor ieder team!

### Op zoek naar de levenskracht van het chapter

Bij mijn start als chapterdirecteur stond ik voor de keuze waar ik mijn energie en aandacht op ging richten. Ik had het gevoel, dat de 'sense of urgency' niet bij iedereen even sterk aanwezig was. Tegelijk had ik niet de behoefte om hel en verdoemenis te prediken, als er niet snel iets ging veranderen. Ik koos ervoor, om me in eerste instantie te richten op de levenskracht van onze groep: wat was de sterkte van ons chapter, wat maakte, dat we nog steeds bestonden en dat de leden nog steeds met plezier naar de bijeenkomsten kwamen?

Ik ontdekte drie factoren die bijzonder waren van ons chapter:

- De goede sfeer
- De hoge aanwezigheid van de leden
- De gastvrije ontvangst van gasten.

Vooraf dit laatste werd keer op keer door gasten benadrukt. Het is niet zo vanzelfsprekend om positieve zaken expliciet uit te spreken. Door dit wel te doen, versterkten we elkaar in die zaken waar we goed in waren, onderwijl werkend aan onze zwaktes.

### Creativiteit in presentaties

Ieder BNI lid krijgt iedere week 60 seconden tijd om zijn/haar bedrijf te presenteren en aan te geven waar hij naar op zoek is. Hoe zorg je nu ervoor, dat deze presentaties interessant en verrassend blijven? Hoe voorkom je, dat het een sleur wordt, waarin iedereen zijn verhaaltje opdreunt zonder bezieling of inspiratie? Hiervoor hebben we actief verschillende prikkels ingezet.

Zo moesten de leden een keer hun presentatie in de vorm van een pantomime doen (zonder woorden), hun business presenteren met behulp van een voorwerp en hun presentatie op rijm declameren. Ook organiseerden we een breng-je-vervanger-mee dag, waarbij de vervangers de presentatie voor de leden moesten verzorgen. Gevolg was dat de creativiteit gestimuleerd werd en er weer lichtheid en humor in de bijeenkomsten kwam.

De filosofie luidt 'givers gain': hoe meer jij anderen geeft, hoe meer je terugontvangt.



### Persoonlijke belronde

In een BNI bijeenkomst wordt niet alles uitgesproken. Er leven allerlei gevoelens en emoties onderhuids en een belangrijke vraag was: hoe krijgen we hier zicht op? Hoe komen we erachter, wat de leden beweegt, wat de motivatie is om al dan niet door te gaan. Welke twijfels hebben de leden eventueel en wat kunnen we hieraan doen? Wat zijn de dissatisfiers?

Om hier zicht op te krijgen besloot ik een persoonlijke belronde te maken langs de leden. In dit telefoongesprek ging ik niet alleen in op de klachten en onvrede, maar ook op de positieve ervaringen: wat inspireert je om door te gaan? Wat zijn je positieve ervaringen in het chapter? Wat zijn de mooie verhalen? Welke ondersteuning kan ik je als chapterdirecteur geven?

Deze belronde werd zeer positief beoordeeld. Vooral het feit dat ieder persoonlijke aandacht kreeg en de mogelijkheid werd geboden zich uit te spreken, werd erg op prijs gesteld.

### Chapter uitje

Eenmaal per halfjaar hebben wij een uitje met het chapter. Dit keer besloten we het nuttige en het aangename met elkaar te combineren: Tijdens ons uitje gaf ik een korte samenvatting van de belangrijkste bevindingen uit mijn belronde. Vervolgens hielden we een waarderende dialoog, waarin we vooral focusten op de vraag: hoe kunnen we onze sterktes verder versterken en onze zwaktes minimaliseren? Het was een inspirerende bijeenkomst en de energie werd voelbaar sterker.

### Waarderen van successen

In het boek *Het wortelprincipe* gaat het om erkenning van prestaties en inspanningen van medewerkers. In veel organisaties is dit niet vanzelfsprekend. Zoals een medewerker van een groot bedrijf treffend formuleert: 'Als ik een fout maak, dan wordt die 100 procent van de tijd onderkend; doe ik iets goeds, dan wordt dat 99 procent van de tijd niet onderkend.' Elton en Gostick houden een vurig pleidooi voor het meteen en openlijk uitspreken van waardering, vergezeld van een passende beloning. Dit principe zijn we binnen ons chapter bewust gaan toepassen. En het is wonderlijk wat voor positief effect dat heeft: op betrokkenen, omdat er publiekelijk erkenning is voor zijn of haar inspanning; voor het chapterbestuur, omdat het een heel rijk en voldaan gevoel geeft om waardering te uiten en te delen met anderen.

In AI wordt gesproken over de levenskracht van de organisatie (life giving force). Door (weer) aansluiting te zoeken bij die levenskracht, kan een organisatie opnieuw tot leven komen en verder groeien of ontwikkelen.

### Wat was het resultaat van al onze inspanningen?

Tegen het einde van onze bestuursperiode, maart 2010, was ons chapter uit de gevarenczone. We zaten weer op 20 leden (nog niet de beoogde 25), het aantal referrals was gestegen tot 0,5 per lid per week, we hadden een vrij constante stroom van bezoekers (4 per week gemiddeld) en het aantal leden dat hun lidmaatschap verlengde was aanzienlijk gestegen. We waren een heel eind gekomen, maar het werk was nog niet klaar. Het estafettestokje werd overgedragen aan het volgende bestuur, dat kon voortborduren op het werk dat we in deze periode gezamenlijk verricht hadden.

### Een waarderende terugblik

In AI wordt gesproken over de levenskracht van de organisatie (life giving force). Door (weer) aansluiting te zoeken bij die levenskracht, kan een organisatie opnieuw tot leven komen en verder groeien of ontwikkelen. Terugkijkend op mijn periode als chapterdirecteurt, denk ik dat dit het belangrijkste is dat ik gedaan heb: op allerlei manieren de verbinding met de levenskracht opnieuw tot stand brengen en versterken, waardoor het vertrouwen en de inspiratie werd versterkt.

- Inspirerende doelen stellen helpt om de focus te richten
- Expliciet formuleren wat ons chapter zo bijzonder maakte
- Speelsheid en lichtheid in de 60 seconden presentaties brengen
- Persoonlijke aandacht voor ieder individu
- Een open dialoog over wat de leden bezighoudt en hoe we hiermee om kunnen gaan
- Expliciet waarderen van successen en individuele bijdragen

Als consultant zit ik meestal in de rol van adviseur of facilitator. Dit keer had ik een leiderschapsrol. En dat maakt een groot verschil. Als chapterdirecteur heb ik echt de druk ervaren om zaken ten goede te keren. Ik hoefde dat gelukkig niet alleen te doen: we hadden een leiderschapsteam dat gezamenlijk optrad en ook de andere BNI leden hebben bijgedragen aan het succes. Maar toch voelt het anders om ook de daadwerkelijke verantwoordelijkheid te hebben. Een waardevolle ervaring! We hebben geen complete AI cyclus doorlopen, maar vooral gehandeld en gekeken vanuit de AI filosofie.

Het was een spannende periode en als dan blijkt, dat de verschillende acties resultaat hebben, is het heel dankbaar om te zien, dat de mooie filosofie van AI ook binnen de context van een BNI chapter succes kan hebben.

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# High Performing Transient Teams in Organizations

## Integrating AI and Experiential Learning

#### ABSTRACT

Transient teams – teams with short natural life spans – need to get up and running very quickly, and remain high-performing throughout their time together. Strength-based team building approaches using tools such as Appreciative Inquiry integrated with Experiential Learning are particularly effective in contributing toward the success of these teams.

*Transient: 1 a : passing especially quickly into and out of existence : transitory (transient beauty); b : passing through or by a place with only a brief stay or sojourn (transient visitors). 2 : affecting something or producing results beyond itself.<sup>1</sup>*

In today's complex, information-based global marketplace, organizations often rely on short-term, 'transient' teams, who must work within pre-determined time and resource constraints to rapidly create and deliver value for internal and external clients. Given their relatively short life spans, transient teams must discover how to reduce learning and production cycle times in order to better utilize team member resources, rapidly complete projects and deliver results.

By their very nature, transient teams have three interdependent performance drivers: value, knowledge and speed. In order to deliver on these three drivers, individual team members must learn how to orient themselves rapidly to changing task, leadership and membership variables. And team leaders need to create an environment that welcomes and values individual member strengths and skill sets, while facilitating an intentional team development process that maximizes individual and team performance within the context of constant change.

#### Team development enablers

Transient teams perform best when members are conscious and mindful about their team's development process. Research on team and group development indicates that when team membership and/or team tasks change, even well developed, mature teams revert to previous stages of development. Therefore, having an awareness of team development models like Tuckman's – Forming, Storming, Norming, Performing, Adjourning – can help team members assess where they are in their formation, and clarify what to do in order to guide the

<sup>1</sup> <http://www.merriam-webster.com/netdict/transitory>



'Worm hole' trust building activity: emphasizes team supported risk-taking (see Appendix A)

**All photos in this article: courtesy of Executive Edge, Inc.**

team toward more effective performance. As well, teams can accelerate their development by employing specific performance enablers such as:

1. Creating organizational supports that maximize efficiencies, minimize redundancies, and collect and store institutional knowledge
2. Establishing team principles of practice that define team norms and culture
3. Developing the necessary people skills in order to rapidly build positive interpersonal working relationships

Team building processes that integrate strength-based approaches such as Appreciative Inquiry (AI) combined with Experiential Learning (EL) are effective at accelerating transient team development and performance. AI's generative dialogue kick-starts the process of building positive interpersonal relationships. And by combining AI with a set of shared, structured experiences, team members work within an experiential learning laboratory where they can safely practice people skills, and construct the norms and operating agreements necessary to improve overall team performance.

### **Benefits of strength-based team building**

So how do strength-based approaches enhance the team building process for transient teams? And what value do they bring to the teams' respective organizations?

### **Welcoming and valuing individual team member skills and capacity**

Strength-based approaches to team building help team members practice their welcoming skills. They formalize a process for valuing the strengths and skills of individual team members, which not only serves to introduce and transition new members into the team, but also allows each team member a moment to 'shine' and gain status within the team context. Such structured welcoming helps new team members quickly feel included, and committed, contributing to accelerated performance from those team members.

Also, by understanding each other's learning style (through tools like Ned Hermann's Diversity Game and/or instruments like David and Alice Kolb's ELSI – Experiential Learning Styles Inventory, among others), team members identify how to harness individual strengths, and approach conflict resolution in a healthy and productive manner. Such structured experiences illustrate that diversity is not a liability but one of the team's best assets.

### **Rapidly kick-starting positive interpersonal working relationships based on trust and mutual respect**

Strength-based approaches encourage people to build emotional bonds and friendly relationships based on mutual liking, trust and a sense that they understand and share each other's aspirations and concerns. By participating in a shared structured experience, team members develop rapport, eliciting a group memory that leads to building positive energy, relationships and community.

### **Establishing shared team history**

Strength-based approaches help teams write their story, creating a team history that is built upon 'what works' within the team, and emphasizing the experiences,

'Alien transplant' activity: requires that team members clarify roles & mutually adjust in order to complete a complex task (see Appendix A)



resources, skills and strengths that each member brings to the task. New teams benefit from the kick-start that comes from quickly establishing a team story. Existing teams benefit by re-starting and redefining their story based on current and past successes. Through a process of active experimentation, reflection and open dialogue, the team establishes a collective history based on shared experiences, goals and visions.

### Creating a resonant workplace climate

Extensive research by Hay McBer illustrates the importance of resonant workplaces, citing that up to 30% of a team's ability to achieve results is due to resonant work climates. Put into monetary terms, a team's ability to achieve up to \$3m US of a \$10m US project is due to their workplace climate.

Resonance is a combination of group alignment toward achieving shared purpose, positive emotions and the ability for all team members to bring their whole, authentic self to work. Strength-based structured learning experiences help to quickly generate resonance within the transient team context.

### Healthy conflict resolution

Strength-based team building can provide tools, resources and interpersonal skills that enable conflict resolution among team members. In order to resolve conflict in a healthy way, transient team members need to know when to concede their point-of-view in the interest of achieving the team's shared goals.

When people don't know each other, they tend to be protective of themselves and rigid in their positions on contentious issues. Strength-based approaches to team building welcome team members, establish their status and create a sense of belonging within the team. These approaches quickly align individual team members to core team goals, values and principles of practice. This in turn provides insight for team members when they are faced with deciding whether to concede their position for the sake of achieving the team's goals.



'Channeling success' activity: raises the issues of 'utilization and engagement' of all team members during task completion

### Team building across entire organizations

Quickly building collaboration between and among teams, across functional boundaries and within entire organizations is a priority for most companies. Global and national sales teams, regional manufacturing groups, even entire organizations can benefit greatly from positive interactive experiences that are designed to build internal collaboration across the organization.

Large group strength-based team building approaches (taking place on an organizational scale) allow team members to experience a 'snapshot' of the whole organization when it is performing at its collaborative and cooperative best. They learn both that cross-functional collaboration is possible, and that they can create it in their workplace. Through generative dialogue, team members gain insight into multiple perspectives on issues experienced daily by teams across the organization. They also co-create solutions that have grassroots support.

Like an injection of powerful medicine, large groups of people (hundreds or even thousands at a time), return to work feeling positive, energized and revitalized – in essence, generating a 'tipping point' that allows positive, collective energy to disseminate throughout the organization.

### Transient team case story – Bendix Knorr-Bremse ERP Kick-start

In 2006, the Bendix Knorr-Bremse SAP team (approximately 120 participants) came together for a two day ERP (enterprise resource planning) kick-start. The team consisted of many subject matter experts (SMEs), from the company SAP as well as Bendix, along with department heads and key players who were working on the SAP project in addition to their day-to-day responsibilities. A significant number of the Bendix participants were new to the concept of ERP software, and were concerned about the demands the SAP installation would place on them. The overall program goals were to:

- Create a blueprint for achieving a shared vision of a successful installation
- Build positive working relationships in order to enable collaboration and teamwork
- Practice cross-functional knowledge sharing
- Engage in a fun shared learning experience

Prior to the program, participants 'paired up' in person or via phone for appreciative interviews. The interview questions focused on past teaming 'peak experiences', and the participants' hopes and aspirations for a successful installation. The pre-program strength-based interviews kick-started team and relationship building within the group, and helped to generate positive expectations about the upcoming training. They also set the tone and generated anticipatory 'buzz' prior to the training event.

Strength-based activities and structured affirmative dialogue were integrated throughout the two-day kick-start. For example, during Discovery stage of the learning program, participants experienced a team activity called 'Power Walk'<sup>2</sup>, where they identified core values and commonalities shared by other

<sup>2</sup> See Appendix 1 on page 42.

'Group pyramid' activity: a new transient team completes a collaborative task



team members. During the Design stage, teams co-authored SAP 'Principles of Practice', and immediately lived them in a series of higher 'perceived risk' trust building (e.g. climbing and belaying) and complex multi-team activities. The program ended with a team and large group Action Planning session that the group then applied to the next phase of their SAP roll-out.

### Conclusion

Transient teams are common in today's organizations. Due to their unique, shared characteristics of defined life spans and variable membership, transient teams require team building approaches that will launch them into high performance very quickly.

Strength-based approaches to team building that are integrated with experiential learning processes are effective means for building teams varying in size from a small work team of 6 to 12 members up to hundreds of people across entire organizations. Appreciative Inquiry integrated with structured learning experiences provides practical application of interpersonal relationship building skills, effective team problem-solving and decision-making and readiness for taking action.

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### Appendix A: Design Flow and Sequence of Challenges<sup>3</sup>

Front-loading and Debrief Focus		Selected Structured Experiences with Continuous Learning Cycle Accelerate Relationships, Learning & Change
Discovery Dream	Rapport ===== Empathy	<ul style="list-style-type: none"> <li>• Power Walk</li> <li>• Celestial Express</li> <li>• Space Walk</li> </ul>
Design	Trust	<ul style="list-style-type: none"> <li>• Worm Hole</li> <li>• Alien Transplant</li> </ul>
Destiny	Mutual Understanding	<ul style="list-style-type: none"> <li>• Rocket Launch</li> <li>• Closure</li> </ul>

The column on the left reflects the AI 4-D Cycle, the middle column reflects the desired outcomes of the Relationship Building Continuum, and the column on the right shows the challenges that the teams faced during the program.

As the table illustrates, the first three challenges were specifically designed to promote rapport and build empathy. Moreover, the group front-loading and reflection periods for these challenges provided (in the form of affirmative front-loading) and generated (through debriefing) meaningful information for the Discovery and Dream phases of the AI process.

The focus shifted during the next set of challenges. These activities emphasized trust building, and encouraged the discussion toward changing the status quo. At this point, the group created principles of practice: group norms, systems and processes that nurtured best practices and enabled the future.

Finally, the culminating activities provided opportunities for applying and testing the principles of practice in a highly collaborative setting. The goal here was to establish and articulate mutual understanding (which naturally flows from the previous process) and commitment toward actions, speech and attitudes that align with and support a new Destiny.



**Kemp van Ginkel**

An appreciative facilitator for teams and other groups who want to make a positive movement in their way of working, he sees AI and systemic thinking as fundamental to an approach for teams experimenting with new ways of acting and interacting. He is a partner at Kessels & Smit The Learning Company in The Netherlands.

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# Appreciative Facilitation

## Based on Practical Rules of Thumb

**ABSTRACT**

Appreciative facilitation of teams is based on a few rules of thumb. As facilitators, we all seem to focus on the scenario that 'people in work groups or teams achieve great results, use powerful methods and use each others expertise, and also develop this competence'. What a wave of energy hope, inspiration, and success in organizations that would create!

When I was introduced to Appreciative Inquiry, it gave words and meaning to a way of working that was already familiar to me, albeit implicitly. This article contains explicit practical suggestions, based on how I encourage and support the shaping of powerful teams. I call this approach the 'appreciative facilitation' of teams.

The facilitator using such an approach needs a consistent focus on 'what is' and what works by giving meaning, identifying results, recognizing talents, creating connections, making room for reflective moments and signalling new horizons.

By appreciating the strengths team members have, the successes they have achieved and the potential of those strengths for new activities, one encourages the energy needed to actually take the next step. Thus the facilitator supports growth and development, and prevents the team from falling back into old patterns of thinking and behaviour.

Appreciative facilitation of teams is based on a few rules of thumb:

**Rule of thumb A**

**Understanding precedes being understood**

Each team most needs 'free space' to talk to and understand each other. Using dialogue to explore 'what is' as well as how team members experience reality lays the foundation for effective learning together as a team. This way of communication requires a keen, compassionate examination of those views.

**Through dialogue**

The quality of the conversation within the team determines the learning capacity of the team. If appreciative facilitators encourage dialogue, they put emphasis on an investigative approach, which considers slow and profound thinking and the suspension of judgments and assumptions. The goal of dialogue is to enable new thinking to emerge, based on 'thinking along', rather than 'thinking against'.

It is easier said than done: start from the strengths of a team member ... What you do is put a magnifying glass on and appreciate the person's uniqueness.

The result is not an immediate, concrete solution, but understanding each other's assumptions and actions. In a powerful dialogue process, team members invite each other to take their point of view, to 'be in their shoes' for awhile. This requires really understanding each other and respecting current inadequacies: in other words, to have compassion. (Senge, 1992)

### Through reframing

For some team members, it is easier to see events negatively, rather than to tend to positive interpretations. The appreciative facilitator assists in redirecting interpretations that have no added value, such as: 'Sven is working against me by not keeping to the rules', which can also be interpreted as 'Sven has decided that he can assist the customer better by not applying the rule in this case'.

Team members will use this approach when they realize that everyone's reaction is determined by their frame of reference – so you can also choose a different framework which is more effective or more consistent with team values. The appreciative facilitator will challenge a team complaining about a tyrannical boss to seek a solution through mutual support and a common approach in communicating with the boss about the perceived abuses. Thus the problem of 'difficult boss' is reframed into the solution 'strong team'. (Block, 2000)

### Rule of thumb B

#### Appreciation brings in energy

The most powerful engine for good work emerges when it makes sense for a team member to 'get going': to build something, to explore, to learn a skill or to investigate limiting beliefs in connection with others. That has an inner motivation and is increased by (external) ratification: the interest or the trust of team mates, the faith that you will succeed, the constructive feedback from the first results. Success leads to new success and encourages another step forward.

### Through making success visible

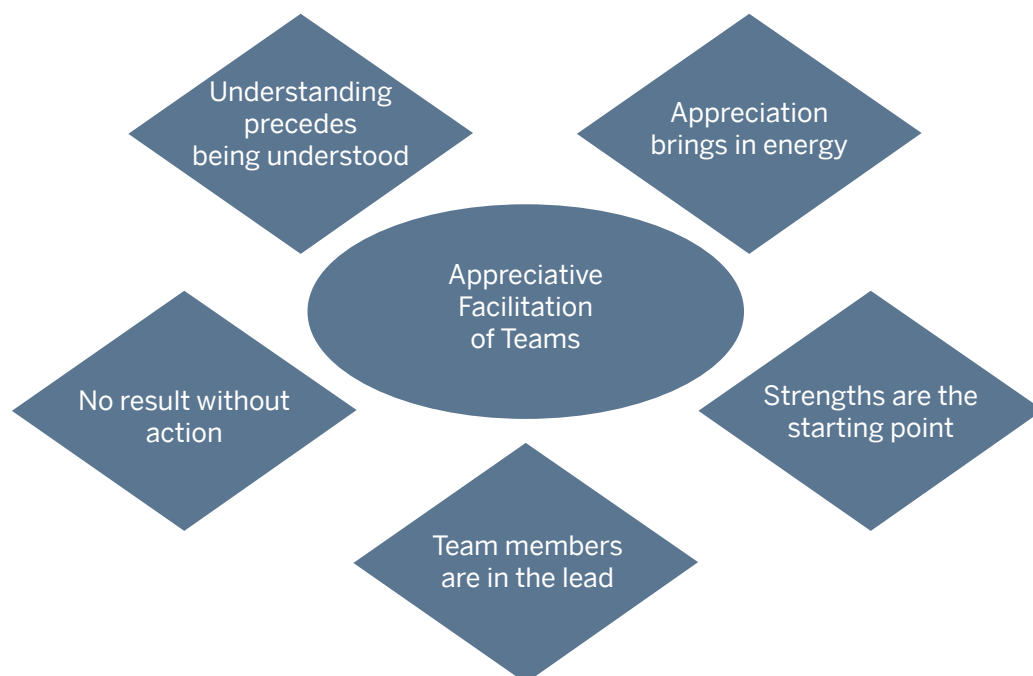
Some team members believe that they are not capable of doing or learning certain things, or that they do not know enough, or cannot make decisions. You can recognize them because they want to involve experts, embrace best practices from other organisations, avoid risks and learn in a 'consuming' way, whereas the skills, growth, responses and choices can often only be found in their own 'being'. But it requires (self-) confidence, focus and courage to tackle the issues themselves. And that is exactly where the appreciative facilitator contributes: by making team successes visible, encouraging the team to build from that, appreciating first attempts, recognising outcomes and challenging the team to continue.

Team successes provide new energy to experience even more successful experiences. Moreover, they are the key to understanding when the team is at its best. Reflection on what worked offers a motivating basis for new successes.

### Through being specific

In the first stages of a new task or assignment team members need confirmation of the things that are going well. (Smit, 2002) Their main concern at that moment is: 'How do I survive this?' and 'Do I do well?' All positive feedback in this phase of learning works as an accelerator, and it is important that all team members know and apply this knowledge.

Figure 1: the rules of thumb



Positive appreciation is the same as giving a compliment. Formulating compliments on the effort instead of the result encourages people to develop themselves. (Dweck, 2006) Being as concise as possible is also essential, especially when the facilitator says precisely what went well and what the positive effect was on the team level. If the team member thinks that his or her conduct is 'normal' or 'just lucky', you can emphasize the talent and potential you see by giving more examples where the person also showed this behaviour. (Landsberg, 1999) Thus a pattern of strength becomes visible.

### **Rule of thumb C** **Strengths are the starting point**

Each team member possesses qualities, more or less visible. Some qualities are only visible as pitfalls or drawbacks, such as 'perfectionism'. By rephrasing them as underlying strengths (eg 'care') as a basis for development in the team, the effect is immediately noticeable. The team member will use his skills more, which has an impact on the rest of the team. Not everyone is good at everything, and need not be. It is therefore essential to have insight in your personal strengths and undertake activities that use that unique combination.

### **Through investigating**

It is easier said than done: start from the strengths of a team member. Some team members are mainly seen as 'being difficult'. Yet the investigation of their behaviour is the key. Some people do not show the behaviour they really want to show or they simply do not know which behaviour is appropriate for team effectiveness.

Through addressing behaviour and trying to figure out what the intentions of team members are, you will get closer to their strengths. Someone who lingers in a highly detailed formulation of goals and results can do that from a talent of 'caring'. If you can tap into the quality and help to deploy it effectively, everyone

The facilitator can contribute to the appreciation of the differences between team members.

in the team benefits. What you do is put a magnifying glass on and appreciate the person's uniqueness.

### Through developing uniqueness

The next step might be to support the development of strengths. Sometimes that is about becoming even better at what you are already good at. Sometimes it is about the search for 'levers' (Dewulf, 2009), additional abilities that help to increase the use of strengths. Sometimes it is about applying the same quality in other situations. Sometimes it is just more conscious deployment of the strengths that leads to magnification.

In addition, the facilitator can contribute to the appreciation of the differences between team members. Genuine collective learning occurs only then when team members let themselves be influenced by each other's approaches, perspectives and expertise, working together toward improvements or innovations.

### Rule of thumb D

#### Team members are in the lead

It is perhaps not always consciously done, but the team members themselves completely determine their own work and learning process. Their motivation and strengths lead. The facilitator can 'merely' support the conscious use of this fact. Not every team member will consciously take control of the working and learning of the team. This often leads to a dependent attitude: trainers should indicate what and how to learn, or the manager must determine whether the result is 'good enough'. The appreciative facilitator helps the team become aware of its own responsibility, the opportunities for self-management, and ways to assess their impact.

### Through focus on solutions

Appreciative facilitation of teams is sometimes very subtle, in the things that you don't do as a facilitator. This applies particularly to a focus on solutions instead of problems. Problems and failure experiences are often discussed in the team with the (implicit) intention of appointing a culprit, or these issues are not discussed and the tension goes underground, so energy goes on what they do not want. The alternative is to make clear that something is going on or went wrong, then jointly decide how things should be and change it. Then the energy flows toward what the team does want.

### Through impact thinking

Subsequently, 'impact thinking' is very helpful in appreciative facilitation. Impact thinking means that the facilitator requires the team members to reflect on the impact of their actions again and again. Team members evaluate their behaviour or approach in relation to the question: is this action effective in light of what we want to achieve? (Visser, 2005) If yes, let's go on! If not, what is needed is to achieve the desired impact?

Thinking in the terms that 'this action is more effective than' is a more powerful – guiding – approach than 'this action is wrong'. When used from this perspective, feedback from others on the impact of your actions is supportive.

For me the art of appreciative facilitation is about its minimalist nature. With minimum steering interventions, the facilitator ensures the most effective support.

### **Rule of thumb E**

#### **No result without action**

The main direction given by a facilitator is the insistence on creating an experience. Just thinking about a quality or expressing an ambition does not lead to a tangible change in the outside world. Experiencing the impact of one's strengths through action offers the potential to give new meaning to these strengths.

#### **Through practical support**

The facilitator does not seem to play a major role in this phase: the team must do this themselves. But sometimes practical support can be a good way to support the team in maintaining upward momentum. A facilitator can assist in preparations, be co-executor or pioneer within the organization. As long as the initiative and the implementation of the solution remains with the team, the facilitator serves the interest of the team.

#### **Through using the network**

In this phase of putting things into action, the appreciative facilitator can encourage the involvement of others in the team network. Who would be a critical person to support the team's action? Who has the necessary expertise? Who knows the way? What would encourage that person to help? So you acknowledge that the team has a whole arsenal of support people available and that using this expertise is effective.

#### **Through challenging and re-calibrating**

Dealing with new practices and collaborations can be exciting; the daily practice can sometimes feel like complete chaos. Reason enough for team members to only partially put new insights into practice, or avoid them altogether. The appreciative facilitator helps not to fall back into old patterns by constantly putting the feelings, the dilemmas, the choices and constraints experienced by the team on the agenda. By encouraging the exchange of experiences, by appreciating the steps that have been taken, by acknowledging feelings and by supporting next steps, the facilitator establishes an environment in which team members can experiment and are allowed to make mistakes. Followed, of course, by the invitation to learn from these mistakes and try again...

#### **Appreciative facilitation 'with your fingertips'**

My experience is that it is important to make the connection between the rules of thumb: each team member has his own strengths, but one needs to recognize them to be able to work with them for the benefit of the team. And only when people harvest success from using their qualities in their team are they able to see the impact they have had and how they have helped their team develop.

For me the art of appreciative facilitation is about its minimalist nature. With minimum steering interventions, the facilitator ensures the most effective support. The intended effect is that the team itself takes on responsibility, takes up initiative, perform actions and takes care of follow-up.

In this contribution, by reflecting on my five rules of thumb, which determine my behaviour as an appreciative facilitator of teams, I hope to inspire fellow facilitators to make explicit and share their own practical wisdom as well.

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## What's in AIP May 2011

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### AI++: Innovations in AI through the Australian Lens

**Guest editors: Sallie Lee, USA and Dayle O'brien, Australia**

This issue will explore AI evolution and innovation in Australia and New Zealand, a part of the Southern Hemisphere known for putting their own special creative stamp on all their endeavors. We will hear about experiments, combined approaches, and new thinking about the practice of AI.

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[www.aipracticitioner.com](http://www.aipracticitioner.com)

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is CEO of van Harte & Lingsma, a Dutch training and consulting agency, Chair of the Global Council of AI Consultancy and a member of the International Advisory Practitioners Group of AI Practitioner. As Director of Learning Solutions at British Telecom from 1998 to 2009, he used AI to facilitate change and innovation.

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# Interview with Joep C. de Jong

## an AI leader of Teams

**ABSTRACT**

Joep C. de Jong is one of the few Dutch leaders who has been working with AI consistently for many years. We interviewed him about AI leadership, how he practices it and what are the challenges for an AI leader. He told us too about the essence of teambuilding and how he deals with conflicts in teams. Finally he shed light on the use of AI in team questions.

We talked with Joep about the essence of teambuilding, the way he uses AI with teams as a leader and his farewell at BT last year.

**In your opinion, what is the essence of teambuilding?**

For me, it is the inquiry – the questions into what you want to be and what you want to deliver as a team. The process is about connecting and sharing. This begins with the discovery and the storytelling. The sharing continues in the dream phase. Co-creating (design and destiny) is often a self-directing process that doesn't need a lot of intervention when the connecting and sharing have been successful.

**What if there is a conflict situation. What happens then and how do you cope with it?**

In case of severe conflict the parties have lost their connection with each other. They don't see each other as human beings any more. Reconnecting is the issue. As a leader you can certainly help with that. It is important to work on bringing back trust by truly appreciating each person's emotions and points of view.

There is always some ground where you find alignment. This may mean tapping into a fundamental value such as honoring mothers in that society. In the most extreme conflict situations when I was working in Asia and Africa, I found that when you appeal at this fundamental level, you can re-create alignment between the parties. Searching for this deeper experience like the love of a mother for her children can be especially important when a common vision is way out of sight. This image can be a theme which creates the possibility of making contact again.

**How can you use Appreciative Inquiry with teams?**

You can always use AI principles with team issues. This is important when there is no time to intervene with the full 4 D-cycle. For instance, take the story of when Apollo 13 was in serious difficulties in space. The leader in Cape Canaveral

**“Problems are frustrated dreams. But dreams come first.” Joep C. de Jong**

said to his team: ‘it is not a question of “if” but “how” we bring them back with everything we have.’ And he showed them a toolbox containing the tools available.

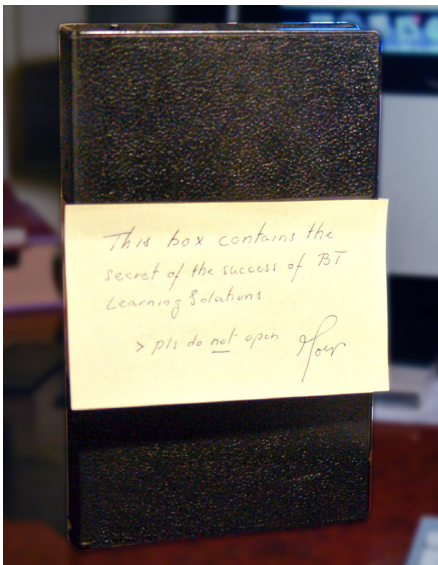
You can always use this way of looking at the world – looking for what is possible – in teams. It means that even problems are signs that there is something to appreciate. You can discover this by storytelling about the best there is and how that can change the team’s situation.

Often there isn’t time to use the AI process to its full extent. For example, when task forces are under a lot of time pressure: even in a lunch session of two hours people can see new possibilities.

### **What do you see as the role of the leader?**

The leader has to show that social constructionism can exist in the day-to-day business environment. He provides the space for the differing opinions and emotions, he appreciates and inquires. As a consequence there is room for all views and perspectives. It is not about having the same opinions and agreeing with each other or becoming friends. It is about the appreciation of differences. So he creates space for different views to be and afterwards connects these again with the teams vision.

I would like to stress the importance of including the wider community in team issues. Stories become richer and have more variation when all stakeholders join the sharing. The results are better, more differentiated, in the discovery as well as the co-creation process.



Joep's box with his secrets for success

There is often tension for managers between setting rules for the team and giving room for improvisation. In today's business environment teams have to be more flexible; because of the speed required to react to new developments in the world around us there is less room for bureaucracy. My conclusion is that the traditional control management model that suggests predictability is easier for traditional managers than the AI way of leadership. True AI leaders and practitioners can live very well with the knowledge that they don't know what exactly the destination of the team is.

### **Joep's farewell at BT/Learning Solutions**

We end with a story of Joep's goodbye at the department he guided successfully for 15 years. Since 2005, he had kept a little box on his desk, visible for everybody. On the box was a note saying: 'This box contains the secret of the success of BT Learning Solutions'. Inside were two quotes. Nobody was allowed to open the box. For his farewell meeting Joep asked his team and others related to the community what they thought the secret was. Or rather, what they wished it was. Nearly everybody mailed a reply. These replies and stories were a key part of his farewell speech. After more than ten years of 'applied AI' it was wonderful to see the stories shared as they said why they thought the group had been successful! In the end, some people wanted to know what was in the box, while others wanted the secret to stay a secret. Joep gave the box to two team members, one who wanted to open the box and one who would rather it stay closed, asking them to be the guardians of the spirit of the success of BT's Learning Solutions group.

Ronald and Cora, May and June 2010

**Cora Reijerse**

Consultant, trainer, coach and project manager, she has roots in client-centered psychotherapy. She likes to contribute to learning and development in organizations. A moderator at the NIP (a Dutch psychology institute), she writes about AI, teambuilding and individual career coaching, and is the founder of All About Change.  
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# In Conclusion: Teambuilding the AI way

## Advantages and New Perspectives

Having worked with the articles in this AI Practitioner we wanted to bring together our thoughts about the following question: What does teambuilding the AI way contribute and add to traditional theory about ways of working with teams?

Our conclusion is that Appreciative Inquiry gives us several advantages and new perspectives including:

1. AI is a good way to create connection in a team or group. One of the strengths of the approach is the 'I' to 'we' connection focused around a specific theme ('it') which starts with the discovery phase. Through storytelling, people quickly learn about each others' strengths and ambitions and dreams in a natural way. Then as a simple unforced process, generative relations develop that are the vehicles of inspired co-creation.
2. AI can be used in a broad number of situations, both in teams and in groups. Whether in a transient team, a team in conflict, a team of long-standing that wants better delivery, or a project team, the AI way helps. We are pleased to realize that the AI way is not restricted in its use, but creates possibilities to be meaningful for different questions and contexts.
3. It is not necessary to use the whole 4-D cycle to be successful. It is the basic approach and the use of the principles that can make a big difference. Also when there is not as much time, you can still inquire and appreciate.

However, we do wonder if the change in some of our own projects would have been more sustainable if there had been more attention to renewal, improvisation and learning aspect in the co-creation process and the delivery phase. But that is a question about the nature of change results and what contributes to enduring and transformational change, and is not the subject of this issue. Also our doubts can be an indication of overly-devoted facilitators who think they can't be missed!

4. The role of a leader and facilitator working in an AI way is different from the traditional roles of authority or expert. Instead of managing and controlling, the

'Even problems are signs that there is something to appreciate.' Joep C. de Jong

AI leader gives his team members the lead and helps create a high energy level in the team. An important challenge for the leader is to keep appreciating even in hard times. 'Even problems are signs that there is something to appreciate.' (Joep C. de Jong)

The facilitator is not the expert who gives feedback on dysfunctional communication or explains team test profiles: it is about putting the individual's uniqueness and the creation of energy and hope under a magnifying glass. We could not agree more with Kemp when he states that: 'For me, the art of appreciative facilitation is about the minimalist nature of it. With minimum steering interventions the facilitator ensures the most effective support. The intended effect is that the team itself takes on responsibility, takes up initiative, perform actions and takes care of follow-up.'

5. Two years ago, in a chapter about teams in the first Dutch Appreciative Inquiry Handbook, *Waarderend organiseren*, one of us asked whether AI could be used in combination with other techniques. The articles in this issue show that the answer is 'yes'. AI has been used in combination with the STAR model, Future Design, working with the different selves and Experiential Learning.

At the same time, we also raised the question: Can you start directly with the Inquiry when there are severe conflicts in a team? Since Cora trained as a psychologist and psychotherapist and is regularly asked to help with teams in trouble, we would like to conclude by sharing a story about using AI in these situations.

#### **From a fragmented to a professional team valuing differences**

An HR team in a Dutch multinational was in severe trouble. For some years the team had been gradually falling apart. Members of informal subgroups did not work together on projects, people ignored each other in meetings and in the hallways, turned their head away when they met in the elevator and some had office affairs. Their old manager had a laissez-faire management style. The new manager had been in the job for six months. A number of people did not trust him because he had fired three of the most dysfunctional and disloyal team members. On top of that, the stakeholders in the organisation became more and more dissatisfied.

Everyone longed for a better future, but felt it was very far away. As a team facilitator, it felt unnatural to work with this team from the start on the discovery of the best team experiences and stories. There was misery and pain everywhere.

But there was room for appreciation and inquiry. By beginning to appreciate the deeply felt, shared longing for a better tomorrow together and accepting and valuing the situation as such, the manager, some team members and I arrived at the following assumptions:

- We are working on trusting each other again
- We all want an inspiring and successful team
- We will cope with the issues that are currently in the way first, to have a better future in the shortest time

We had a very emotional, tense and exciting session in which everyone expressed their feelings about the others, including the manager. At the end of the session, there was great relief and tiredness.

A month later, the discovery and dream phases of the best team experiences resulted in a dream of an innovative, active successful team that respected differences within the whole. The design factors were named.

A year later, I was told by the manager and a team member that the team was doing much, much better.

We would like to conclude by saying that we see a great future for teams the AI way. AI fits perfectly into modern organizations and teams. While some people still think it is necessary to engage in some special form of fighting or arguing with one another to get better at teamwork and is one reason people partly dread being assigned to new team or projects, we see teamwork differently.

People don't take the traditional, mechanical planning and control approach any longer. We see more and more organic forms of organizations and teams. We also see that working the AI way strengthens the team's cooperation and goal orientation and we are excited that we have come to know more about AI in worldwide practice.

**Ronald and Cora**

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## What's in AIP August 2011

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### Impact of Appreciative Inquiry in International Development

**Guest editors: Irene Norlund and Mette Jacobsgaard, Denmark, UK**

International development is based on the assumption that one part of the world has great needs and wants which can be fulfilled by those living in another part of the world. The greater the problems and needs, the more likely it is that aid will come forward. This issue will address the social construct of development aid and how AI is being used around the world to change and impact this construct through empowering recipient groups of aid.

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### Lena Holmberg

has a PhD in Educational Research, worked as a consultant and manager in an IT company and started the AI consulting company Apprino. With Jan Reed, she was guest editor of the November issue of the AI Practitioner in 2007 that focused on AI and research. Contact: [lmholmberg@gmail.com](mailto:lmholmberg@gmail.com)  
[lenamholmberg.blogspot.com](http://lenamholmberg.blogspot.com)



### Jan Reed

PhD, BA, RN has been involved in research for many years. She has a nursing qualification, and teaches and supervises healthcare students at Northumbria University. Her interest in the possibilities and contributions of Appreciative Inquiry research to the processes of change has recently resulted in a book. Contact: [jreedhexham@gmail.com](mailto:jreedhexham@gmail.com)



# AI Research Notes

## edited by Lena Holmberg and Jan Reed

AI Research Notes carries news of AI research developments. We'd like to make it as collaborative and appreciative as we can – we know that many of you are working and thinking about the relationship between academic research and AI, and that you have news, comments and questions which we'd like you to contribute.

### Editors' note

The following paper describes a study which used a quantitative approach to explore changes after applying Appreciative Inquiry. The paper is interesting because AI research has often been qualitative and has explored the ways in which change is perceived rather than the impact AI has on behaviour. The study described below has gone through the process of identifying and defining this potential impact, and developing measures for change. This process of reflection has value as an exercise that all researchers might undertake, whatever their methodological persuasion.

### Invitation to contribute

So AI research is entering the academic arena! We know that there are many more students at various levels who are using Appreciative Inquiry in their academic work as a framework, as a method, as inspiration, as a research focus and much more. Are you interested in presenting your work? Please get in touch.

Please send suggestions and material to [jreedhexham@gmail.com](mailto:jreedhexham@gmail.com) or [lmholmberg@gmail.com](mailto:lmholmberg@gmail.com)

## A Quantitative Approach to AI Research

Bert Verleysen

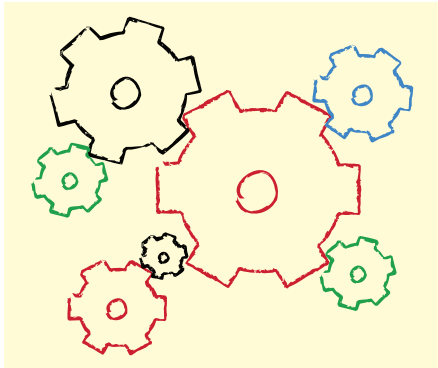
Stebo vzw, Genk (Belgium)  
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Frederik Van Acker

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Appreciative Inquiry started as an action research method. Its growing success shows that AI is not only a research method, but a method for action: AI has the ability to create a new spirit in an organisation. Participants in this process co-create the organisation with their own strengths and possibilities.

The success of AI has mainly been researched with qualitative methods and only a limited number of quantitative studies on the impact of AI have been reported in recent literature. In a linear process where A is affecting B, it is easy to set up a quantitative study. AI, however, is not a linear process: AI is an organic process of emerging organisational life. In an AI-process, people strive toward a new wholeness of the reality, based on relatedness. This togetherness-concept of AI is the complete opposite of the quantitative approach: dividing reality into measurable components indicating causes and effects. Moreover to enable systematic research into AI, these measurable components must be clearly defined while many concepts related to AI remain vague.



One of the advantages of quantitative research into the AI domain is that people can see the impact that AI has on organisations. Reports of this are currently largely anecdotal and seldom based on objective research. The success of an AI-process is multi-faceted: What is changing in the organisation? What is changing in a person? These questions tend to gauge the evidence-based reality behind the happy and shiny story telling in AI. Quantitative methods can point out these underlying processes, and allow a greater generalisability of the results.

### Operationalising a study into AI

Operationalisation in a scientific study involves the effort to define fuzzy concepts, making them measurable. This was done by a research team in 2009 studying the impact of AI on different psychological variables. What follows are the experiences of the involved researchers (Verleysen and Van Acker, 2010).

In this study, AI was investigated by comparing two groups of organisations: organisations working with AI, or without, AI. A questionnaire was developed measuring experienced AI (eAI). The questionnaire contained 15 items, with a focus on two approaches: the 4D cycle and critical situations in the organisation.

The results of the AI questionnaire showed a different level of eAI in organisations with and without AI-practice. Although the results were statistically significant, the difference between the level of eAI was small. One possible explanation for this limited effect is the choice of participating organisations. Are there any objective measures to identify organisations adopting AI? AI is more than going through the 4D cycle: AI is a complex process. Organisations which allegedly practice AI may not do so effectively, while organisations which have never heard of AI may implement some of its techniques implicitly.

A second issue is that although AI is presented as a specific method with distinct steps, there are many differences in implementing the AI-method, depending on the organisation's aims. Comparing organisations which have adopted AI with other organisations would thus imply neglecting the complexity of the AI construct. It would probably be more useful to measure the extent to which organisations use AI, instead of working with a dichotomy of adopters and non-adopters. Moreover it is not the fact of implementation *per se*, but rather the subjective experience of this implementation which is of interest to many scientists.

The result could also be due to the questionnaire itself, which was not able to differentiate the actual behaviour in organisations with or without AI-practices. When developing a questionnaire it is possible to choose different focuses. First, one can investigate whether an employee thinks that the organisation is adopting the AI-method by asking the employee about his or her 4D cycle knowledge and awareness.

Secondly, one could focus on typical organisational situations and behaviour: is there a difference behaviour between employees in organisations with or without an AI practice? Finally, one should focus on the attitude of the employee: does the employee report a daily AI-life attitude in appreciating possibilities? Is he or she striving toward exploring and co-creating, appreciating and giving life to those possibilities? All of these aspects need to be translated into specific questions which are relevant for different organisational contexts.

### Challenges for future research

Constructing a subjective AI measure on an individual level is a necessary and important step toward fundamental research on AI. Once the AI-level in a person can be determined, researchers can relate this to other psychological factors (e.g. stress and motivation).

On an organisational level, the challenge is to identify those elements which distinguish between AI and non-AI practices. On an individual level it seems important to look at situations eliciting behaviour: which are the critical situations where AI behaviour can make a real difference? What is typical behaviour in those situations for someone living up to the AI-principles? Moreover it is important to identify the behaviour which provides evidence for a genuine AI-life.

Constructing and validating the aforementioned questionnaire is important for further scientific research on AI, moreover it could be useful in daily organisational practices. Knowing how successful the implementation of AI is, assessing the level of AI attitude and behaviour of employees could help to evaluate and adjust the ongoing AI-process.

### References

Verleysen, A.L.J., and F. Van Acker. (2010). 'Appreciative Inquiry Evaluated from a Self-deterministic Perspective: The Impact on Psychological Capital.' *Fifth European Conference on Positive Psychology*, Copenhagen, Denmark. Retrieved from [http://www.talent-bezieling.be/images/stories/documenten/poster\\_def.pdf](http://www.talent-bezieling.be/images/stories/documenten/poster_def.pdf)

### Advertisement

## Useful tools for AI and Research

### Impact of Appreciative Inquiry on Research: Experiences, Reflections and Thoughts for the Future.

AI Practitioner, November 2007

Guest editors: Professor Jan Reed and Dr. Lena Holmberg.

### Impact of AI on Research – the Latest Experience DVD

DVD documentation of the workshop led by Professor Jan Reed and Dr. Lena Holmberg on 9th November 2007 in Gateshead, UK.



**Both are available from [www.aipractitioner.com](http://www.aipractitioner.com)**



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# AI Resources

## edited by Jackie Stavros and Dawn Dole

AI Resources features a rediscovery of classic and new resources for your use. Resources include list-serves, books, journal articles, book chapters, DVDs, websites, blogs, podcasts, etc ... all in one place to help with your consulting practice, internal work, teaching, training and extending your knowledge base and resources.

### Editors' Note

The August 2010 issue answered a frequently asked question at AI workshops, presentations, and trainings or on a list-serve: 'What's a good book to learn more about the basics of AI?' The column featured eleven primer AI books.

In this November 2010 issue, we present a list of practitioner books on specific AI topics such as evaluation, coaching, knowledge management, strategy, nonprofit management, project management, personal living, community building, relationships, research, schools, teamwork and more.

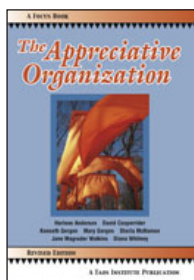
In the February 2011 issue, we will be featuring books on Appreciative Leadership. If you know of one that should be considered please email us. If you know of other books that focus on Appreciative Inquiry, we invite you to submit a book to the AI Commons at: <http://appreciativeinquiry.case.edu/intro/bookReview.cfm>

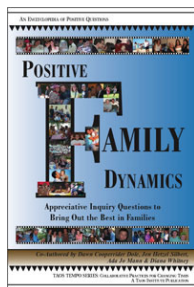
We have listed the books alphabetically by author:

### The Appreciative Organization (Revised Edition)

Anderson, H., D. Cooperrider, K. Gergen, M. Gergen, S. McNamee, J. Watkins, D. Whitney. (2008). Chagrin Falls, OH: The Taos Institute Publications. ISBN: 978-0-9712312-7-6

The authors are unanimous in their view that the appreciative construction of meaning is essential to the efficacy of an organization and the fulfillment of its participants. This book addresses the challenges of decision making, leadership, group functioning, personnel evaluation and the relationship of the organization to its context.

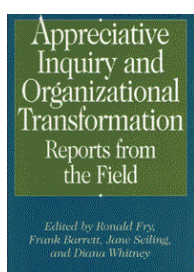




### **Positive Family Dynamics: Appreciative Inquiry Questions to Bring Out the Best in Families**

Dole, D., J. Hetzel-Silbert, A.J. Mann and D. Whitney. (2009). Chagrin Falls, OH: Taos Institute Publication. ISBN: 978-0-9712312-9-0

The questions, stories and activities in this book will help you create positive dynamics within your family. The book's questions, exercises, and positive spirit create simple approaches for helping families discover reserves of strength and opportunities for better living. This book contains 56 appreciative questions designed to increase learning, listening and positive dynamics within your family.



### **Appreciative Inquiry and Organizational Transformation: Reports from the Field**

Fry, R., D. Whitney, J. Seiling and F. Barrett. (2002) Westport, CT: Quorum Books. ISBN: 1-56720-458-9

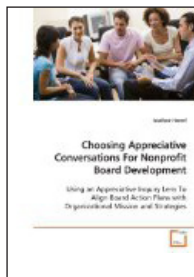
This is a collection of articles by some of AI's most renowned practitioners. They provide detailed reflections by leading practitioners on the use of AI. These reports from the field show how this unique approach is applied as well as its consequences. Readers will learn to identify the 'positive core' of any system: the practices and principles that encourage the best in organizational capacity and performances.



### **Birth of a Global Community: Appreciative Inquiry in Action**

Gibbs, C. and S. Mahe. (2003). Brunswick, OH: Crown Custom Publishing, Inc. ISBN-13: 978-1933403168

The birth of the United Religions Initiative (URI) is the story of how thousands of people across cultures, oceans and faith traditions began to share a common call to make the world they lived in more like the world they yearned for in their dreams. This book tells how one person's vision and conviction evolved to include a global community working together to make their dreams real – dreams reflected in a call of the sacred within a world-wide, faith-based organization.



### **Choosing Appreciative Conversations for Nonprofit Board Development**

Hamel, J. (2009). VDM Verla, ISBN: 9783639138535

This action research project explored how sharing stories of board excellence through an AI process could strengthen a nonprofit board. By participating in the AI 4-D cycle, board members shared stories, identified themes that contributed to higher board efficacy, constructed a shared vision, and developed an action plan. Through interviews, the researcher

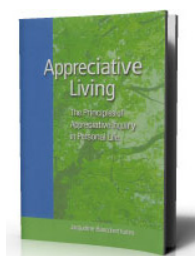
assessed participants' perceptions regarding the effect of the process on individual and team learning, commitment to action, and group effectiveness.



### **Appreciative Moments: Stories and Practices for Living and Working Appreciatively**

Jacobson, E. (2008). iUniverse. ISBN: 978-0595429110.

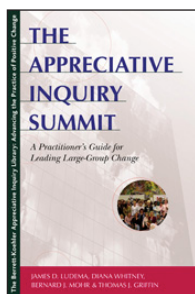
With true stories, humor, self-reflection and practical exercises, this book shows how to enrich your everyday life, starting right now. Appreciative Moments uses positive psychology and an AI approach to affect personal and organizational change. Topics: welcoming your life's work, letting your soul catch up with you, and refrigerator magnet thinking.



### **Appreciative Living: The Principles of Appreciative Inquiry in Personal Life**

Kelm, J. (2005). Venet Publishers. ISBN: 978-0977216109

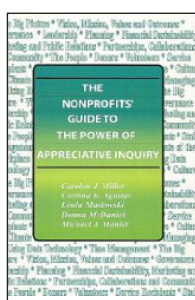
This book is an encyclopedia for living. It covers the AI principles supported with theories from positive psychology and the New Sciences. It includes five new AI principles suggested by AI practitioners, and introduces the 3-step AIA process.



### **The Appreciative Inquiry Summit: A Practitioner's Guide for Leading Large-Group Change**

Ludema, J., D. Whitney, J. Mohr and T. Griffin. (2003). San Francisco, CA: Berrett-Koehler Publishers. ISBN 1576752488

This book is guide to the AI Summit – a methodology when applying AI to whole-scale change and large groups. This book explores the underlying theories of organization change and large-group process and walks the reader step-by-step through planning, conducting and following up on an AI Summit. Examples include John Deere, Verizon, British Airways, the United Religions Initiative, World Vision and many others.

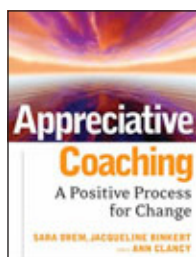


### **The Nonprofits' Guide to the Power of Appreciative Inquiry**

Miller, C. J., C. R. Aguilar, D. McDaniel and L. Maslowski. (2004). Denver, CO: Community Development Institute. ISBN: 0-9761843-0-3

This book provides a variety of sample questions in many topic areas useful for non-profits (e.g. fundraisers, boards, volunteers, etc.) as well as a theoretical background of the use of AI in non-profits and other organizations. It

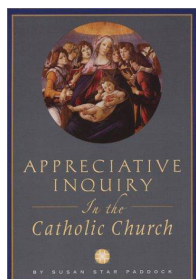
presents an emerging model for organizational theory of 'organizations as a network of conversations'.



### **Appreciative Coaching: A Positive Process for Change**

Orem, S., J. Binkert and A. L. Clancy. (2007). San Francisco, CA: Jossey-Bass. ISBN: 978-0787984533

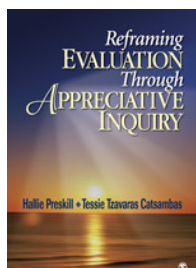
This book describes an approach to coaching rooted in AI. At its core, the Appreciative Coaching method shows individuals how to tap into their sense of wonder and excitement about their present life and future possibilities. Rather than focusing on individuals in limited or problem-oriented ways, Appreciate Coaching guides clients through an AI 4-D Cycle that inspire them to an appreciative and empowering view of themselves and their future.



### **Appreciative Inquiry in the Catholic Church**

Paddock, S. S. (2003). Bend, OR: Thin Book Publishing. ISBN: 978-0966537345

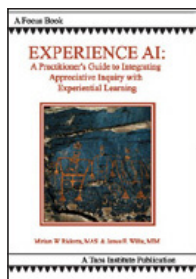
This book highlights AI as a way of looking at the world that turns problem-solving upside-down by looking within our heart-felt memories for the undiscovered solutions that already exist. It provides information for those who use AI in Catholic communities for strategic planning, parish planning, relationship building, transition, community development and for spiritual renewal. There are stories of Catholic Relief Services, the Diocese of Cleveland, the Catholic Health Association of Canada and many others.



### **Reframing Evaluation Through Appreciative Inquiry**

Preskill, H. and T. T. Catsambas. (2006). Thousand Oaks, CA: Sage Publications, Inc. ISBN: 1412909511

This book offers evaluators a generative to view their work. AI is the search for what aspects of an organization are effective and holds the key to innovation and growth. Illustrations are provided that have been used to frame, design and conduct evaluations in various sectors worldwide. The authors show how to apply AI to various aspects of evaluations. The book is helpful for evaluation workshops.

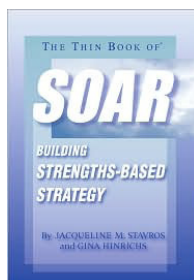


### **Experience AI: A Practitioner's Guide to Integrating Appreciative Inquiry and Experiential Learning**

Ricketts, M. and J. Willis. (2001) Chagrin Falls, OH. Taos Institute Publications. ISBN 978-0-9712312-2-1

This volume invites you to share in a conversation around the power and efficacy of embedding experiential learning models, tools and techniques into appreciative inquiry in order to accelerate positive change, motivate teams and individuals, generate buy-in and engage people at all

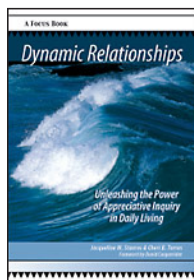
levels. By sharing and learning from experience, people attain the high levels of rapport, empathy, trust and mutual understanding necessary to risk and embrace change together.



### **The Thin Book of SOAR; Building Strengths-Based Strategy**

Stavros, J.M. and G. Hinrichs. (2009). Bend, OR: Thin Book Publishing. ISBN: 978-0982206805

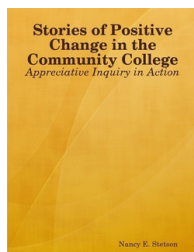
SOAR is an approach for framing strategy through an appreciative lens. SOAR stands for Strengths, Opportunities, Aspirations, and Results. SOAR takes the AI philosophy and applies it to provide a strategic thinking and dialogue process. This book highlights several organizations throughout the world that have used it and achieved measurable results.



### **Dynamic Relationships: Unleashing the Power of Appreciative Inquiry in Daily Living**

Stavros, J. M. and C. B. Torres. (2005). Chagrin Falls, OH: Taos Institute Publishing. ISBN: 0971441669

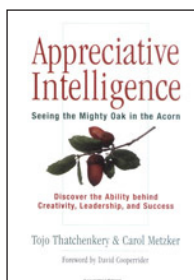
This book invites us to step into the appreciative paradigm, where the principles governing our actions and relationships offer a means for increased value and meaning in our lives and our communities of work and play. Dynamic Relationships offers us the opportunity to practice these principles through cycles of reflection and action in ways that empower us to become a force for creating and sustaining life-affirming relationships and success in daily living.



### **Stories of Positive Change in the Community College: Appreciative Inquiry in Action**

Stetson, N. E. (2008). Palm Springs, CA: Company of Experts.net. ISBN: 9780615239730

This book is designed to help community college and other educational leaders bring about positive change. The book features 40 colleges that are using AI for areas from teambuilding, planning, teaching human resource development, self-study for accreditation to assessing organizational strengths, culture, student engagement, student recruitment and retention.

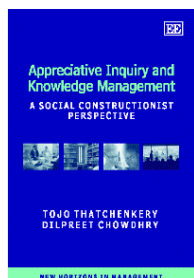


### **Appreciative Intelligence: Seeing the Mighty Oak in the Acorn**

Thatchenkery, T. and C. Metzker. (2006). Berrett-Koehler Publishers. ISBN: 978-1576753538

This book argues that the keys to Appreciative Intelligence are revealing the hidden value in others and building an

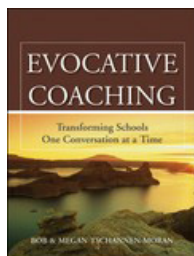
infrastructure, environment or culture that spreads the leader's Appreciative Intelligence. The authors draw on real-life examples and thorough interviews with top executives to identify actual examples of this elusive ability. They show how a knack for creatively dealing with unexpected situations is the common bond among a diverse range of success stories.



### **Appreciative Inquiry and Knowledge Management: A Social Constructionist Perspective**

Thatchenkery, T. and D. Chowdhry. (2007). Edward Elgar Publishing. ISBN: 978-1845425906

The authors of this book advance the Appreciative Sharing of Knowledge (ASK), by which organizations create a culture which facilitates the sharing of information. Using social constructionist approaches, historical data and case studies, the authors demonstrate that appreciation – or affirmation – is the key ingredient for people to trust each other and overcome their inhibitions and concerns about sharing what they know.



### **Evocative Coaching: Transforming Schools One Conversation at a Time**

Tschannen-Moran, B. and M.Tschannen-Moran. (2009). Jossey-Bass, ISBN 978-0470547595

This book maps out a way to change the conversations within schools. By taking a teacher-centered, no-fault, strengths-based approach to performance improvement, the Evocative Coaching model generates the motivation and movement that enables teachers and schools to achieve desired outcomes and enhance quality of life in four steps – Story, Empathy, Inquiry and Design. Each step is presented with illustrative materials and end-of-chapter discussion questions to prompt further reflection.



### **Recharge Your Team: The Grounded Visioning Approach**

Vogt, J. W. (2008). Praeger. ISBN: 978-0313355424

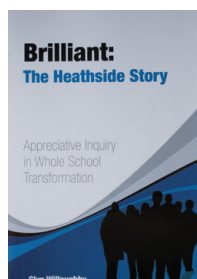
The author shows managers how to come up with a vision for a company, division or department – in less than one day. Grounded Visioning focuses on the positive, giving organizations a process for overcoming even bitter disappointments, efficiently setting the groundwork in place to move together toward a more positive future. This book describes a group planning process utilizing a variation of Appreciative Inquiry that is simple, short and easy to use.

### **Appreciative Team Building: Positive Questions to Bring Out the Best in Your Team**

Whitney, D., A.T rosten-Bloom, J. Cherney and R. Fry. (2004). iUniverse. ISBN 0595335039



This book provides your team with everything needed to discover the keys to past successes and future possibilities by igniting engaging conversations. Providing 48 positive questions, sample interview guides and a step-by-step process for self-managed inquiry, this book demonstrates the development of high performance teams. Choose positive questions on any one of eight topics that are pivotal to team development; then follow a step-by-step self-managed AI process that guides your team.



### **Brilliant: The Heathside Story – Appreciative Inquiry in Whole School Transformation**

Willoughby, G. and N. Samuels. (2009). London, United Kingdom: Kingsham Press.

In this book, the authors brought their best skills to helping students, teachers, staff and governors in Heathside develop an image of their future and then live it. Everyone at Heathside got involved, experienced a new way of working with each other and achieved more than they thought they could.

## What's in AIP November 2011



[www.aipractitioner.com/aip2011](http://www.aipractitioner.com/aip2011)

### **Appreciative Governance: The Principles and Practice**

**Guest editors: Bernard J. Mohr, Cheri Torres and Sallie Lee**

This unique issue of the AIP initiates an on-going inquiry into the principles and practices of Appreciative Governance. A group of 13 AI practitioners began this inquiry during a Collaboration Studio fall of 2010. The articles in this issue reflect their effort in developing a set of governance principles for strength-based organizations and their work and research into how Appreciative Governance models allow members of these organizations to generate sustainable value.

For a limited time, get 2011 AIP subscriptions @ 2010 rates at [www.aipractitioner.com](http://www.aipractitioner.com)



**Sarah Lewis**

is an organizational psychologist, author of the forthcoming text *Positive Psychology at Work* and lead author of *Appreciative Inquiry for Change Management*.

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**Lesley Moore**

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# About the February 2011 Issue

## Positive and Appreciative Leadership

This issue will focus on engaging, stimulating, challenging, unexpected, surprising, oblique, inspiring and quirky accounts of Positive and Appreciative Leadership. We will be featuring stories, articles, and accounts of practice that go beyond the commonly used '5D' model, accounts that take the AI philosophy and approach and apply it in emerging and unfolding contexts.

**We expect to be featuring accounts of:**

- positive and appreciative leadership, recognising that leadership can be offered from many different positions within organizations and groups.
- acts or interventions that call on an understanding of organizations as living systems and that privilege a positive and appreciative approach to achieving organisational change.
- interventions that have made significant and measurable impacts on an organisation's efficiency or effectiveness, both in terms of financial and staff resources and enhanced delivery outcomes.
- effective ways of helping others develop appreciative leadership skills through formal leadership development programmes, and, how to encourage appreciative leadership through consulting and mentoring
- what it means to be an appreciative leader in the hurly burly of organisational life
- that provide sufficient context to situate the story, and, sufficient detail about significant moments or episodes to reveal key moments of felt and perceived change.

We plan to feature accounts from around the world, all offering a locally situated exploration of a growing global phenomena: appreciative leadership for the twenty-first century.



[Back to Table of Contents](#)

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