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The Appreciative Inquiry Summit
Explorations into the Magic of Macro-Management and Crowdsourcing

Guest Editors: David Cooperrider, Lindsey Godwin, Brodie Boland and Michel Avital

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Cover photo courtesy of Nextel del Peru

International Journal of Appreciative Inquiry

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The Appreciative Inquiry Summit
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ABSTRACT

The AI Summit will continue to grow in significance and positive possibility. We need to expand our conceptual and practical understanding of the AI Summit, and how to further grow and leverage its transformational potential.

Over two decades ago, David Cooperrider and Suresh Srivastva's Appreciative Inquiry into Organizational Life (Cooperrider and Srivastva, 1987) forever changed the way we look at organization development and change – it shifted our attention from the world of organizational life as 'a problem-to-be-solved' to the world brimming with innovation and a 'universe-of-strengths.' Since then, the Appreciative Inquiry Summit methodology has emerged as a key methodology for bringing together 'whole systems' to identify the strengths that exist within the organization and to co-create the future vision for the organization.

From one-day to four-day events, AI summits may bring together anywhere from 50 to 3000 people to work together on a strategic change initiative. The idea of the summit may appear bold at first, but it is based on a simple notion: when it comes to enterprise innovation and integration, there is nothing that brings out the best in human systems – faster, more consistently, and more effectively – than the power of 'the whole'.

Today, the Appreciative Inquiry Summit method (Ludema et al, 2003) and theory of whole-system, strength-based inquiry is transforming every domain of management imaginable: organization strategy formulation; mergers between large companies and multi-sector partnerships; OD and organization culture development work; product design and branding; information systems design. It is igniting networks: transforming world summits at the United Nations and other global change bodies; launching the design of green innovation possibilities in cities like Cleveland and Worcester in the United States, and others around the world; making operational improvements and taking costs

We are convinced that the AI Summit will continue to grow in significance and positive possibility.

out of a business; transforming customer partnerships and relationships; and turning global issues into business and society opportunities for doing good and doing well. (Cooperrider and Avital, 2003-present).

We have seen AI summits used in large corporations like Hewlett Packard, Fairmont Minerals, Green Mountain Coffee Roasters, US Cellular, the BBC, Nextel; in government agencies like the US Navy and the Environmental Protection Agency; in national associations like the American Society for Association Executives; in industry-wide initiatives like the National Dairy Council; in school systems like Houston Independent School District; in non-profit organizations like World Vision; and in world-wide initiatives like the United Nations and United Religions. From the US to Peru, to Nepal, to Belgium, to Brazil – the AI Summit methodology has reached across the globe in a myriad of shapes and sizes to create astounding results.

Changing the whole

But this only the beginning. We are convinced that the AI Summit will continue to grow in significance and positive possibility as our aching world calls for mindsets, management methods and governance structures that go beyond enterprise resource planning and value-chain optimization, and move toward design – to the joint design of whole systems and bio-regions, whole organizations and whole communities by everyone. With case after case, we have mounting evidence to support our hypothesis that lasting transformative change does not come from a top-down approach, nor does it come solely from a bottom-up approach – rather it comes when organizations embrace a third alternative – change from the whole.

We believe that this newly emerging form of 'macro-management' brings out the better angels of both the traditional top-down and bottom-up approaches. As Diana Whitney insightfully captures in her article in this issue, 'Macro-Management of Meaning and Identity: Communication Strategies for Collective Wisdom and Transformational Results,' we have seen time and time again that something magical truly does happen when we tap into the wisdom of the collective. Diana reminds us that the AI Summit invites organizations to transcend the quest to manage people, and instead focus upon the macro-management of meaning.

We know, however, that we have just begun to scratch the surface of what is possible when whole systems and empowered collectives come together in appreciative, generative ways to leverage their combined strengths and innovate for the future. We need to expand our conceptual and practical understanding of the AI Summit, and how to further grow and leverage its transformational potential.

This special issue begins to do just that. Through the insights provided in the following portfolio of 13 articles, we aim to highlight a variety of advances we see emerging in the usage and application of the AI Summit, specifically advances in: fields of application; bridging sustainability and design; crowdsourcing and leveraging technology; post-summit processes; and the non-deficit theory of change.

How AI summits changed Hewlett Packard, page 46

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Advances in fields of application

One of the most exciting developments with the AI Summit is its expanded use in different organizational domains. Educational institutions are increasingly implementing AI summits to create positive change at the system level, such as those described by Joan McArthur-Blair and Jeanie Cockell in their article, 'Tapping the Soul of Higher Education' – they provide a rich overview of the elements, purposes and examples of AI summits in higher education. Lea Waters, Mathew White and Simon Murray's article, 'Toward the Creation of a Positive Institution: St. Peter's College,' gives us a powerful case study of how they used a summit to create transformative change at their school; and Pascal Kaplan, Lindsey Godwin and Kristin Bodiford also share how Houston Independent School District applied AI to create innovative approaches to improve nutrition and physical activity.

In the business community, we are seeing AI being applied in every size and type of organization. Mary Peery's article, 'Creating Change Ahead of the Curve: How AI Summits Transformed the Culture of Hewlett Packard,' describes how a series of AI summits helped to create lasting cultural changes in her organization – even when they were already at the top of their game. Ron Fry's article, 'Improving Safety in a Steel Mill: Words Really Can Create Worlds,' provides a powerful case study of how AI summits were effectively used in a manufacturing industry. 'Taking Enough Time: Keeping the Organization at the Center of the Process,' by Mauricio Puerta and Isabel Wong, illustrates how Nextel in Peru embraced the AI Summit as a methodology to help empower their employees.

What these myriad cases reveal is that the AI Summit has increasingly become a tool for managers to create change at all levels of their organization. Again the changes here were not top-down or bottom-up, but embraced the wholeness of the system. Whether a manager of a steel mill is trying to improve safety for his workers, or a VP wants to create a culture of employee engagement, the AI Summit effectively addresses every-day managerial issues in a variety of contexts.

 Bernard Mohr and Neil Samuels' work in 'The Appreciative Governance Summit' takes us even further in this realm to show how the summit process can be used to help organizations completely transform their management process by designing a more distributed and strengths-based governance architecture. Then, in the final article of our special issue, 'Making Change Easy: The Tiniest AI Summit in the World,' David Cooperrider shows us how we can even apply the success factors of the AI Summit to our own individual lives to create lasting personal change.

Advances in bridging sustainability and design

As society increasingly demands more than just financial profitability, organizations have sought to create sustainable value. A new form of the AI Summit – The Sustainable Design Factory – is proving to be a powerful tool to help businesses – and entire regions – accomplish this feat. Leveraging the principles of design thinking, David Cooperrider and Chris Laszlo elaborate in their article on the ways in which the Sustainable Design Factory is helping organizations like Fairmount Minerals, one of the largest sand mining and manufacturing organizations in the United States, embed sustainability into the heart of their enterprise.

The AI Summit has increasingly become a tool for managers to create change at all levels of their organization.

John Whalen's article, 'Big Change Fast: Systemic Change and Sustainability,' offers further evidence of the capacity of AI to shift entire industries with the pioneering work of the U.S. dairy industry, which used AI to create an unprecedented industry-wide collaboration around reducing greenhouse gas emissions across the dairy value-chain. In 'Beyond the Room: Leveraging Collaborative Technology to Engage the Whole System,' Pascal Kaplan, Lindsey Godwin and Kristin Bodiford discuss how the American Society for Association Executives (ASAE) used AI to help them design industry-wide social responsibility initiatives that are helping to put sustainability on the agenda of every major association in the country.

Advances in crowdsourcing and leveraging technology to move us from the micro to the truly macro

Our increasingly networked world offers an exciting backdrop against which to explore how to leverage developed and emerging collaborative technologies to design AI summits for true macro whole-system engagement. We are seeing how technology is become interwoven throughout the AI Summit process. Increasingly, there is large-scale crowdsourcing pre-summit discovery work that can occur thanks to online systems such as the one described in the article 'Taking Enough Time: Keeping the Organization at the Center of the Process by Mauricio Puerta and Isabel Wong.

In their summit with Nextel in Peru, they had over 360 interviews officially reported and systematized through an online system. In 'Beyond the Room: Leveraging Collaborative Technology to Engage the Whole System,' Pascal Kaplan, Lindsey Godwin and Kristin Bodiford also describe different ways they have innovatively interwoven collaborative technology into the entire summit process, illustrating how we have gone from having representative stakeholder groups participate in a traditional face-to-face event to having all co-located stakeholders engage in the summit in real time.

Advances in the post-Summit process

Anyone who has ever facilitated – or attended – an AI Summit can attest that there is nothing quite as exhilarating as seeing an organization come together to collectively envision and design the future. As Lisa Rees describes in her article, 'The Participant's Perspective: A Story from an External Stakeholder,' the enthusiasm on the last day of a summit is palpable. Then, the crowd disperses and the calendar pages begin to turn and the real work of the summit begins: implementing and sustaining the momentum. As Molly McGuigan details in her article 'After the Wedding: How to Plan For and Maintain a Successful Post-Summit Process' the need to design effective post-summit processes is critical to helping organizations realize the dreams that were envisioned during the summit.

Molly's article provides best practices that she has been developing for how to ensure that the possibilities of the summit process become a reality. We see the importance of post-summit follow-up echoed in Lisa's article; the communications she received from the summit hosts after the event that crystalized her commitment as an external stakeholder to continue to engage with the work that emerged during the summit. These insights, coupled with the collaborative online tools that Pascal Kaplan, Lindsey Godwin and Kristin Bodiford discuss in their article, help us appreciate both the process and tools by
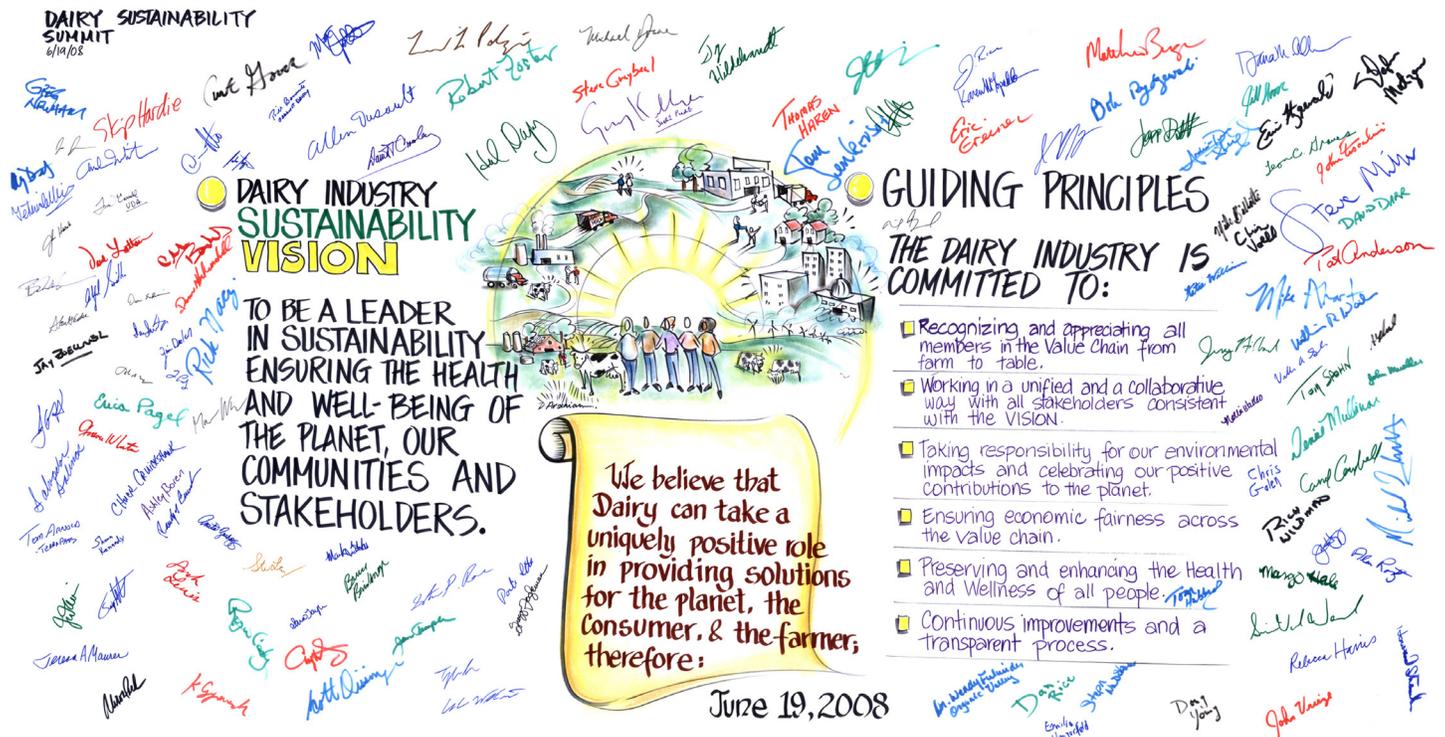
Signatures from ledger of the Dairy Industry summit, page 66

which organizations can effectively ensure that the summit is a beginning rather than an ending for creating positive change throughout a system.

Advances in the non-deficit theory of change

Looking across all the exciting contributions as a whole, we are perhaps most inspired to see the implications this collective body of work has for advancing a non-deficit theory of change. Each of these cases, models and essays illustrate in their own way that sustainable, transformative change occurs when we take the positive to the hilt. As outlined in David's article 'Making Change Easy' the positive change theory he and Lindsey Godwin are developing suggests that for any change agenda – be it an entire region working to create change, or simply an individual striving to improve themselves – one would: pre-frame it; macro-strengthen it; design-think it; prototype it; reverse innovate it; invest it; and then finally, appreciate it.

Reflecting different elements of this theory, these articles invite us to consider how human systems develop most rapidly, effortlessly and enthusiastically through analysis of strengths, aspirations and tomorrow's opportunities instead of working to correct defects, weaknesses, symptoms and yesterday's root causes of failure. The AI Summit is helping to create a turning point in our understanding of organizational realities and move us toward the creation of transformational positivity – the intentional use of positive phenomena, including assets and strengths, positive emotions, wealth-creating opportunities and whole-system network effects to initiate, inspire and better manage change. We have organized the issue in three sections: *AI Summit Theory and Concepts*; *Cases and Applications* and *Post-Summit and Beyond*. Collectively, these rich articles invite us to push the frontiers of our theories and practice of change at the level of the whole.

The Sustainable Design Factory is helping organizations embed sustainability into the heart of their enterprise.

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About the August 2012 Issue
Inclusive Spaces: Using Appreciative Processes to Transform Social Structures

This issue is devoted to multiple viewpoints on using AI to create inclusive spaces in organizations of all kinds through Critical Appreciative Inquiry, an emerging theory grounded in AI, critical theory and social constructionism.

In this special issue of Appreciative Inquiry Practitioner, readers are invited into multiple viewpoints on using AI to create inclusive spaces which transform social structures based on race, religion, age, culture, ability, language and so on. These viewpoints illustrate elements of Critical Appreciative Inquiry (CAI), an emerging theory grounded in AI, critical theory and social constructionism. The contributing authors share their passions for working with AI through social justice and emancipatory lenses. Their stories range from community policing in New Zealand to capacity building of racialized youth and residents of a large city in Canada.

This issue focuses on how the practice of AI fosters and opens inclusive spaces in organizations of all kinds. Authors illustrate ways in which working for emancipation around diversity, power, privilege and difference intersect with the practice of AI. The co-editors present Critical Appreciative Inquiry (CAI), an emerging theory grounded in social constructionism, the principles of AI and which draws into that work critical theory and transformative practices in order to create inclusive spaces. They began to work with these ideas because of their background in diversity and inclusion dealing with issues of power and difference based on race, gender, age, ability, social status etc. There is an opportunity to expand the already inclusive nature of AI through a strong focus on critical social issues that may influence participation, topic development and outcomes.

Writers from around the world bring to this issue an examination of their work in areas from religion, policing, language acquisition, development of non-government agencies, the L'Arche movement, intergenerational dialogue, immigrant parents, and racialized youth. Every author brings to their writing a deep commitment to creating inclusive spaces. They illustrate how, in their contexts, they align AI with their own practices and how it can transform in arenas where social differences are a powerful influence on the process.

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