Using Appreciative Inquiry to Set a Collaborative Vision

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Today’s presenters

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Collective Impact Forum

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About FSG

• Nonprofit consulting firm specializing in strategy, evaluation and research with offices in Boston, Seattle, San Francisco, DC, Geneva, and Mumbai

• Partner with foundations, corporations, nonprofits, and governments to develop more effective solutions to the world’s most challenging issues

• Recognized thought leader in social impact, philanthropy and corporate social responsibility

• Staff of 150 full-time professionals with passion and experience to solve social problems

• Advancing collective impact via publications, conferences, speaking engagements, client projects
FSG facilitates effective cross-sector collaboration in three mutually reinforcing ways

**HANDS ON SUPPORT**

- Juvenile justice in NY State
- Substance abuse on Staten Island
- Cradle to career in King County
- Health in the Rio Grande Valley
- Early childhood in Houston

**THOUGHT LEADERSHIP**

www.collectiveimpactforum.org

The Collective Impact Forum is a field-wide partnership between FSG and the Aspen Institute to help curate and disseminate knowledge, tools, and best practices that support effective collective impact
Please introduce yourself

• Your **name**

• Your **organization**

• Your **city/state**

• Your **level of familiarity with collective impact**
  
  - Not at all familiar with collective impact
  
  - I have heard the term “collective impact” but am not really sure how it differs from other forms of partnership
  
  - I know about the collective impact approach but am not currently involved in a collective impact collaboration
  
  - I am involved in a collective impact collaboration
Agenda for today’s webinar

• Refresher on the nuts and bolts of collective impact

• Using Appreciative Inquiry to establish a collaborative vision (with time to practice)

• Examples of engaging “warm up” exercises to facilitate group conversations
A Refresher on the Nuts and Bolts of Collective Impact
Achieving large-scale change through collective impact involves five key elements

1. Common agenda
   - Common understanding of the problem
   - Shared goal and framework for change

2. Shared measurement system
   - Collecting data and measuring results
   - Focus on performance management
   - Shared accountability

3. Mutually reinforcing activities
   - Differentiated approaches
   - Coordination through joint plan of action

4. Continuous communication
   - Consistent and open communication
   - Focus on building trust

5. Backbone support
   - Dedicated staff
   - Resources and skills to convene and coordinate participating organizations
How long does the process of collective impact usually take?

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<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
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</thead>
<tbody>
<tr>
<td>Stage</td>
<td>Scope &amp; readiness</td>
<td>Initiate action</td>
<td>Organize for impact</td>
<td>Develop strategies &amp; sustain impact</td>
</tr>
<tr>
<td>Time</td>
<td>~3 months</td>
<td>~4-6 months</td>
<td>~4-6 months</td>
<td>~6 months + ongoing</td>
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Is collective impact the right approach?

Who needs to be at the table?

How do we break up the work?

How do we build momentum for the long haul?
Collective impact initiatives often develop a distributed leadership and governance structure

Backbone support is critical to all collective impact efforts, and they perform six major functions:

- Guide Vision and Strategy
- Support Aligned Activities
- Establish Shared Measurement Practices
- Cultivate Community Engagement and Ownership
- Advance Policy
- Mobilize Resources

Backbones must balance the tension between coordinating and maintaining accountability, while staying behind the scenes to establish collective ownership.

Source: FSG Interviews and Analysis
Several elements make up a common agenda

**PRINCIPLES**
How are you going to work together?

**PROBLEM DEFINITION**
What is in and what is out?

**GOAL**
How will you define success?

**FRAMEWORK FOR CHANGE**
How are you going to split up the work and prioritize?

**PLAN FOR LEARNING**
How will you track progress and learn?
How to set guiding principles

Key Considerations

• Promote your shared values
• Set the “rules of engagement”
• Draw on best practices for collaboration in your community

Illustrative Example

Serve the whole community through a systems oriented approach
Take an asset-based approach
This is everyone’s responsibility
Empower people and families
How to define the problem

Key Considerations

• Set boundaries

• Use quality data to inform thinking

• Allow to change over time

At risk for diabetes: 23
Diagnosed Prediabetes: 17
Diagnosed Diabetes: 7
Uncontrolled Diabetes: 3
How to set your goal

Key Considerations

• Choose a population goal that can be measured

• Make it audacious and inspiring

• Add considerations for issues of equity

Illustrative Example

The goal of Unidos Contra Diabetes is...

to reduce the number of new cases of type II diabetes...

... in 5 years

...such that we cause a 10% reduction in the prevalence of diabetes by 2030.

We are committed to doing this by integrating primary and behavioral health for people at risk for diabetes in our community, with a particular emphasis of meeting the needs of low-income and underserved populations.
How to build your framework for change

Key Considerations

• Prioritize the strategies you want to work on first

• Build your groups for action

• Respect that this is an art and a science

Illustrative Example

Steering Committee

Working Groups

Use media to engage the community broadly to raise awareness of diabetes and create a culture of health

Increase screening and testing of diabetes, and connect those at risk to prevention programs

Provide more diabetes education and lifestyle change programs for prediabetic/at-risk individuals and their families

Advance and integrate the medical system to better serve at risk individuals and families

Data Task Force

Research, compile, interpret, and share important data

Partners & Community Members
How to plan for learning

Key Considerations

• Incorporate early thoughts on shared measures

• Note change on different scales

• Strongly emphasize learning

Illustrative Example

Working Groups

1. Awareness
2. Screening
3. Programs
4. Integration

Healthy Community

Health Behaviors

Risk Factors
Diabetes
Group discussion: where are you in developing your veterans-serving collaborative’s common agenda?

**PRINCIPLES**
How are you going to work together?

**PROBLEM DEFINITION**
What is in and what is out?

**GOAL**
How will you define success?

**FRAMEWORK FOR CHANGE**
How are you going to split up the work and prioritize?

**PLAN FOR LEARNING**
How will you track progress and learn?
Using Appreciative Inquiry to Establish a Collaborative Vision
The five conditions build a foundation for collective impact, but leadership is necessary to achieve results.

- Backbone Support
- Continuous Communication
- Mutually Reinforcing Activities
- Shared Measurement
- Common Agenda

Leadership
Progress in collective impact

Level One Progress: Incremental

Level Two Progress: Transformational

To make transformational progress, we need to catalyze leadership in others, and we need leaders who are dedicated to the health of the whole.
Most change processes don’t go deep enough in learning to lead to transformative change

<table>
<thead>
<tr>
<th>Most Change Processes</th>
<th>Transformative Change Processes</th>
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<tbody>
<tr>
<td>Analyze</td>
<td>Sense</td>
</tr>
<tr>
<td>Act</td>
<td>Realize</td>
</tr>
<tr>
<td>Decide</td>
<td>Presence</td>
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“Observe, observe, observe”

“Act swiftly, with a natural flow”

“Retreat and reflect” and allow inner knowledge to emerge

Social change leaders transform into “systems leaders” by developing certain capabilities

- **Capability**: See the system in which actors are embedded
  - **Tool**: Actor Mapping

- **Capability**: Foster reflection and generative conversation
  - **Tool**: Learning Journeys

- **Capability**: Shifting collective focus from reactive problem-solving to co-creation
  - **Tool**: Appreciative Inquiry

*Today we will practice Appreciative Inquiry*
Appreciative Inquiry is a tool that supports the practice and discipline of *Positive Change*

- Appreciative Inquiry looks at **what works well** and uses that as a foundation for future development

- It is essentially **life-affirming** rather than deficit-based. As a result, it **increases the amount of energy and enthusiasm** for moving the organization forward

- The focus is on what is happening in an organization or system when **it is at its best**

- The objective is to **learn from the successes** and use that newly created knowledge to generate positive change and innovation

- Useful conversational tool for **diagnosing system patterns**, producing alignment, and gathering collective wisdom
The Appreciative Inquiry process has four phases; we are going to practice an *abbreviated* part 1

**Inquire** - *what gives life? (best of what is)*
- Appreciating, acknowledging, valuing, interviews, stories
- Asks, “What’s working?”
- Involves paired interviews, sharing stories, identifying themes (60-90 minutes)

**Imagine** - *what might be? (what the world is calling for)*
- Envisioning impact, stories, presentations
- Asks, “What makes it work?”
- Involves individual reflection, small group conversation, identifying themes, visualizing the future (45-90 minutes)

**Innovate** - *what should be? (the ideal)*
- Co-constructing, proposing, design statements
- Asks, “What’s next, and who will benefit?”
- Involves individual, pair and/or small group brainstorming, sharing, development of themes (75-120 minutes)

**Implement** - *how to empower, learn, and adjust and improvise*
- Sustaining, acting, activating, propositions, next steps
- Asks, “Who will do what, by when?”
- Involves individuals/groups choosing which actions they wish to be responsible for making a reality (60-120 minutes)
Facilitating systems change requires *connecting* key actors, institutions, and programs

**PROGRAM LEVEL OUTCOMES**

- Improved health outcomes for *participating children*
- Evidence of success in implementing the program (e.g., ready to scale)
- Increased program participation
- Increased rates of physical activity among target population

**ULTIMATE GOAL**

**INTERMEDIATE OUTCOMES** (3-5 years)

- Evidence of success in implementing the program (e.g., ready to scale)
- Increased program participation
- Increased rates of physical activity among target population

**SHORT-TERM OUTCOMES** (1-3 years)

- Changes in individual behavior (e.g., individual kids)
- Changes in professional practice (e.g., teachers)
- Changes in cultural norms (e.g., exercise, healthy eating)
- Increased funding / improved alignment
- Changes in policy / regulations
- New relationships/connections
- Improved communication
- Increased engagement
- Changes in attitudes or beliefs
- Increased alignment of activities / programs

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*Adapted from Guide to Evaluating Collective Impact. FSG, 2014.*
Appreciative Inquiry exercise

Let’s explore your experiences with “Systems Change” through Appreciative Inquiry. Refer to worksheet, pages 1-2

As you reflect on your own (and as a group), remember these illustrative systems change outcomes from the prior slide:

*ILLUSTRATIVE EXAMPLE FROM CHILDHOOD OBESITY COLLABORATIVE*

**PROGRAM LEVEL OUTCOMES**
- Improved health outcomes for participating children
- Evidence of success in implementing the program (e.g., ready to scale)

**ULTIMATE GOAL**
- Improved health outcomes at scale (for all affected children)

**INTERMEDIATE OUTCOMES**
- Changes in individual behavior (e.g., individual kids)
- Changes in professional practice (e.g., teachers)
- Changes in cultural norms (e.g., exercise, healthy eating)
- Increased funding / improved alignment
- Changes in policy / regulations

**SHORT-TERM OUTCOMES**
- New relationships/connections
- Improved communication
- Increased engagement
- Changes in attitudes or beliefs
- Increased alignment of activities / programs
Group debrief

• What were your reactions to participating in the Appreciative Inquiry activity?

• How could you apply this visioning approach with your veterans collaborative work at home?

• What other questions or reflections do you have about Appreciative Inquiry?
FSG’s Guide to Appreciative Inquiry provides guidance on facilitating Appreciative Inquiry with your partners.

Examples of “Warm Up” Group Discussion Activities
Warm-up Exercise #1: helping people “go deep” in getting to know each other

• Find a partner you don’t know well. Ask,
  • What do you do?
  • Why is it important to you?
  • Hmmm, why is that important to you?

• Keep asking, “Why is that important to you? why…” until you make a discovery about the fundamental purpose behind why your partner’s work is important
Tell me about a time when you felt particularly proud of the impact you made on veterans and their families

Instructions

1. Find a partner who you don’t already know

2. Discuss the question with a partner. Be sure to note your partner’s response. (~ 4 min)

3. Share your partner’s story with the group (~ 1 min each)
Warm-up Exercise #3: making connections between people’s day jobs and the work of the collaborative

**Full Group “Two-Minute Drill”**

- **Approach:** Individual participants each share something top of mind for them with the full group (2 minutes max per person) – either something they’re excited about, or struggling with, or a new update about the work

- **Purpose:** Learn from one another and make connections that might not happen otherwise, by putting rigor and structure around those connections

- **Benefits:** Helps to reinforce heightened level of vigilance that enables participants to collectively see and respond to opportunities that would otherwise have been missed
Group discussion on group facilitation techniques

• Do you have any facilitation exercises or small group / large group discussion activities that have worked particularly well in your collaborative work?

• What made those facilitated discussions so effective (e.g., time allocated for the discussion, balance of small vs. large group)?

• What are potential pitfalls to avoid when facilitating group conversations with your partners?
### Collective Impact Webinars for NVI Partners

**Monday, Nov. 18: 1-2:30pm EST:**  *Creating a Culture of Learning and Continuous Improvement in Your Collaborative,* with FSG’s Joelle Cooke

### Collective Impact Office Hours with Robert Albright and Jennifer Juster

- **Thursday, Nov. 21: 4-5pm EST**
- **Thursday, Dec. 19: 4-5pm EST**
- **Tuesday, Jan. 21: 4-5pm EST**

*We will record each webinar for you to access afterward, if you are not able to join real-time*