Facilitating Organizational Change

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19 May 2006

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Using Appreciative Inquiry for Inspiration and Engagement…

Because Positive Images Lead to Positive Action

Today's objectives

Learn how AI can be used to:

◆ Access collective wisdom about what gives life to organizational systems

◆ Inspire people to imagine possibilities for innovation and change

◆ Engage personal commitment and strategic alignment for implementing change

Agenda

◆ Burning issues

◆ Typical change approaches

◆ What makes AI different?

◆ Experiencing AI for yourself

◆ 5 cases

◆ Imagining change in your organization

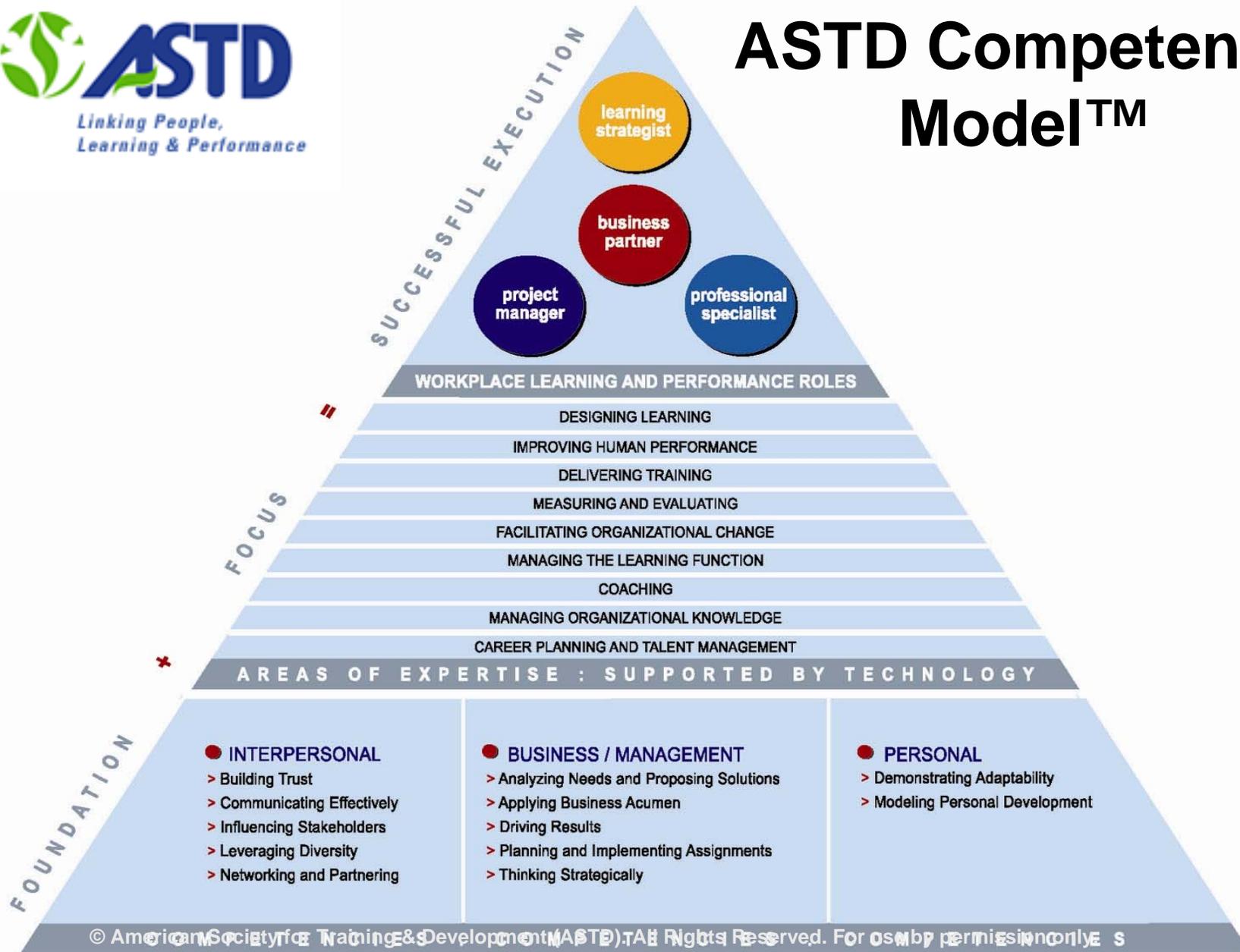◆ Q&A

Setting the stage

What are your

"burning issues"

about facilitating organizational change?

ASTD Survey Research: Implications for the WLP Profession

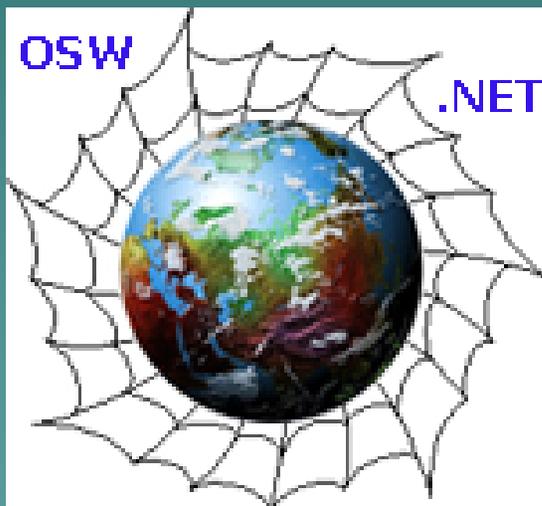| Rank	Implication	% Agree Very Important or Essential	Mean 5-point scale
1	**Aligning learning and performance strategies with the organization's strategy**	**93%**	4.62
2	Demonstrating a payback from your efforts in the form of **improved organizational performance** and measurable results	**85%**	4.32
3	Operating ethically and with social responsibility	83%	4.38
4	Developing or offering learning tools to meet the need for just-in-time learning and knowledge	82%	4.25
5	Developing and implementing strategies for retaining and developing talent	81%	4.26

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ASTD Competency Model™

ASTD logo — Linking People, Learning & Performance

SUCCESSFUL EXECUTION

- learning strategist
- business partner
- project manager
- professional specialist

WORKPLACE LEARNING AND PERFORMANCE ROLES

FOCUS

- DESIGNING LEARNING
- IMPROVING HUMAN PERFORMANCE
- DELIVERING TRAINING
- MEASURING AND EVALUATING
- FACILITATING ORGANIZATIONAL CHANGE
- MANAGING THE LEARNING FUNCTION
- COACHING
- MANAGING ORGANIZATIONAL KNOWLEDGE
- CAREER PLANNING AND TALENT MANAGEMENT

AREAS OF EXPERTISE : SUPPORTED BY TECHNOLOGY

FOUNDATION

● **INTERPERSONAL**
> Building Trust
> Communicating Effectively
> Influencing Stakeholders
> Leveraging Diversity
> Networking and Partnering

● **BUSINESS / MANAGEMENT**
> Analyzing Needs and Proposing Solutions
> Applying Business Acumen
> Driving Results
> Planning and Implementing Assignments
> Thinking Strategically

● **PERSONAL**
> Demonstrating Adaptability
> Modeling Personal Development

ASTD Pilot Certification CPLP Knowledge Test

1. Designing Learning   15%
2. Delivering Training   15%
3. Improving Human Performance   15%
4. Measuring and Evaluating   12%
5. **Facilitating Organizational Change   12%**
6. Managing the Learning Function   9%
7. Coaching   8%
8. Managing Organizational Knowledge   8%
9. Career Planning & Talent Management   6%

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What are some common change models and tools?

My favorite change models

ASTD's CHANGE Model

![ASTD — Linking People, Learning & Performance]
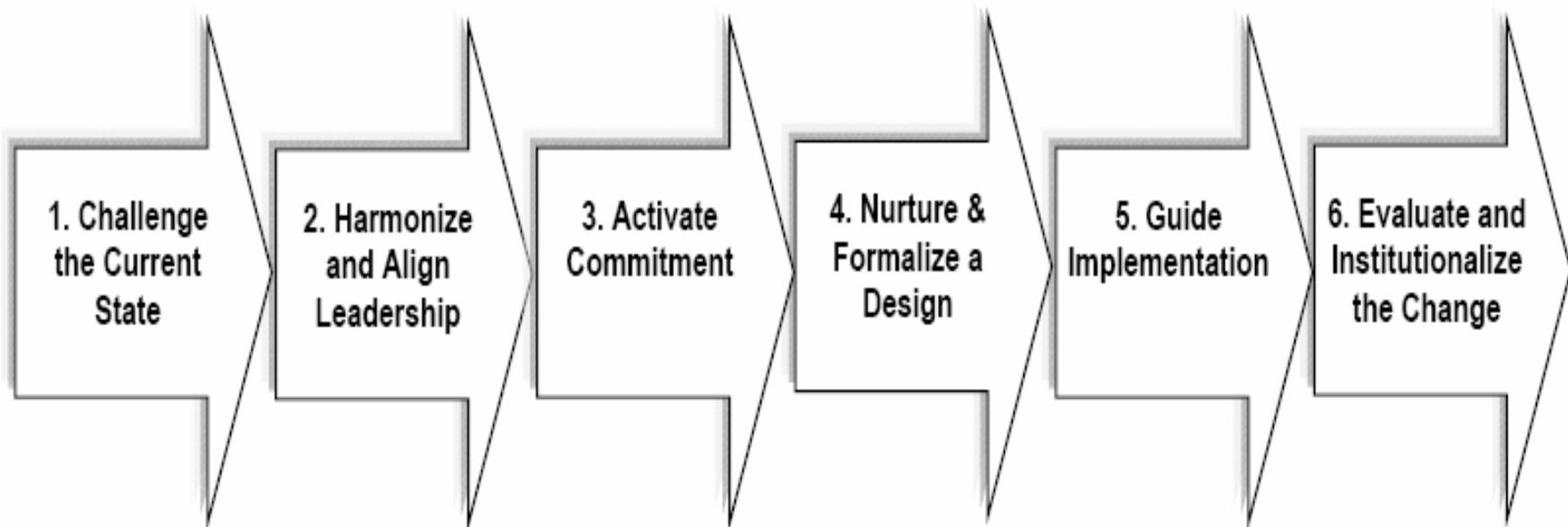
| 1. Challenge the Current State	2. Harmonize and Align Leadership	3. Activate Commitment	4. Nurture & Formalize a Design	5. Guide Implementation	6. Evaluate and Institutionalize the Change
▪ Gather and analyze data. ▪ Establish a sense of urgency. ▪ Establish change management roles ▪ Determine organizational readiness.	▪ Consider your change leader's qualities. ▪ Select a change implementation team. ▪ Create a compelling change vision. ▪ Define alignment. ▪ Design a change communication plan.	▪ Design the implementation plan. ▪ Prepare for reactions to change. ▪ Plan to manage resistance.	▪ Identify systems and solutions to support a successful change effort. ▪ Select appropriate metrics. ▪ Conduct a risk assessment. ▪ Select appropriate implementation and planning tools.	▪ Clarify the change agent's role during implementation. ▪ Identify ways to generate short-term gains. ▪ Determine ways to increase motivation.	▪ Create a process to evaluate the change effort. ▪ Identify ways to institutionalize change elements.

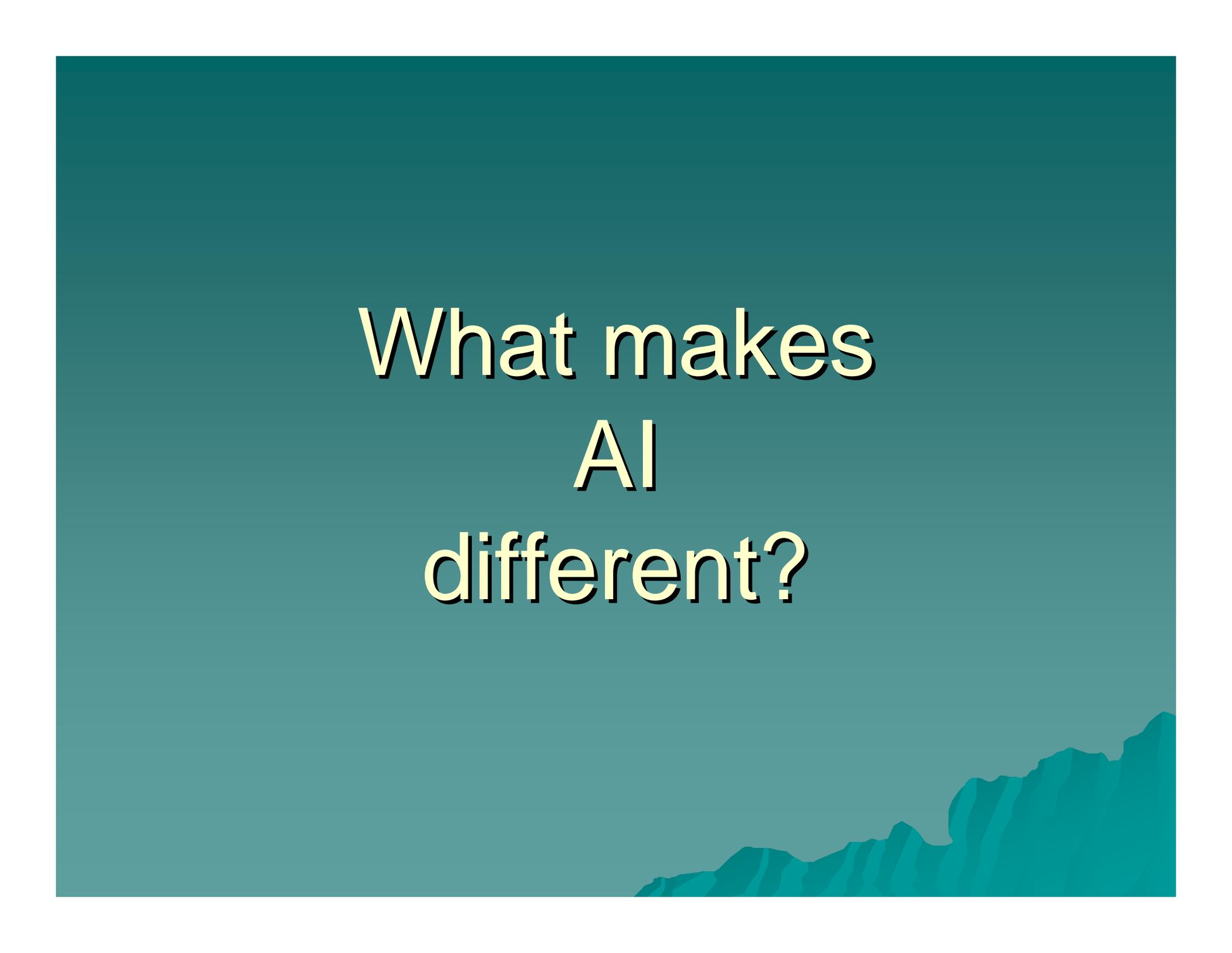# What do most change models have in common?

Typical change process

1. Analyze the situation (i.e., problems)
2. Define ideal state
3. Develop a plan to close the gap
4. Implement the plan
5. Deal with resistance
6. Monitor and evaluate progress

How many times have change efforts failed or missed their mark?
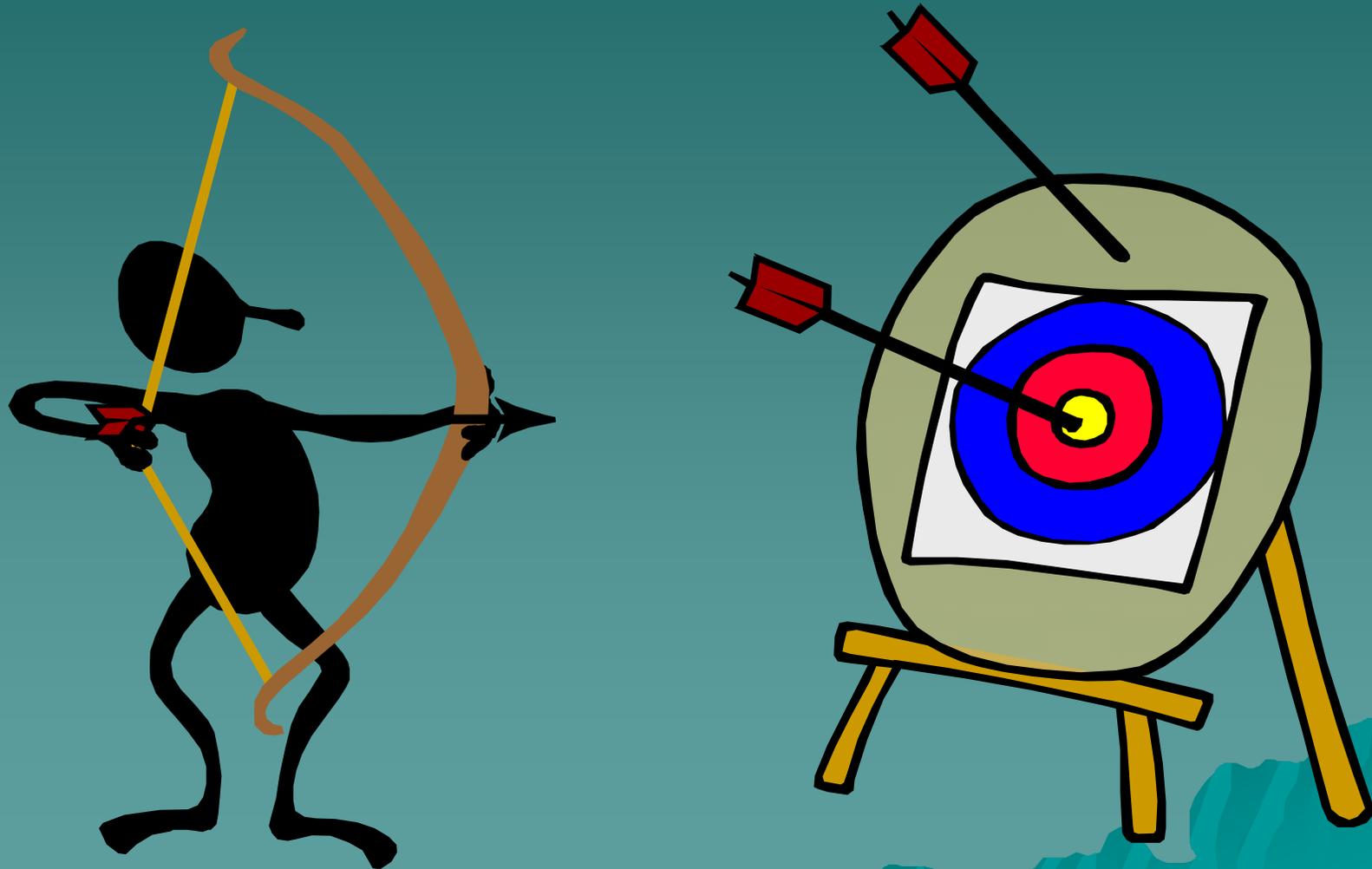
What makes AI different?

"No problem can be solved from the same level of consciousness that created it. We must learn to see the world anew."

… Albert Einstein

Appreciative Inquiry (AI) as

"a collaborative search to identify and understand the organization's strengths, its potentials, the greatest opportunities, and people's hopes for the future"

Appreciative:

- ◆ Valuing

- ◆ The act of recognizing the best in people's strengths, successes and potentials - to perceive those things that give life (health, vitality, excellence) to living systems

- ◆ To increase in value such as the economy has appreciated in value

Inquiry:

- The act of exploration and discovery
- Asking questions
- Openness to seeing new potentials and possibilities

AI origins & linkages

- David Cooperrider & Suresh Srivastva at Case Western Reserve

- Cleveland Clinic in 1980

- Diana Whitney and other collaborators

- AI Commons
  http://appreciativeinquiry.case.edu

- Business as an Agent for World Benefit

- Positive Organizational Scholarship
  http://www.bus.umich.edu/Positive/

People move in the direction they focus on

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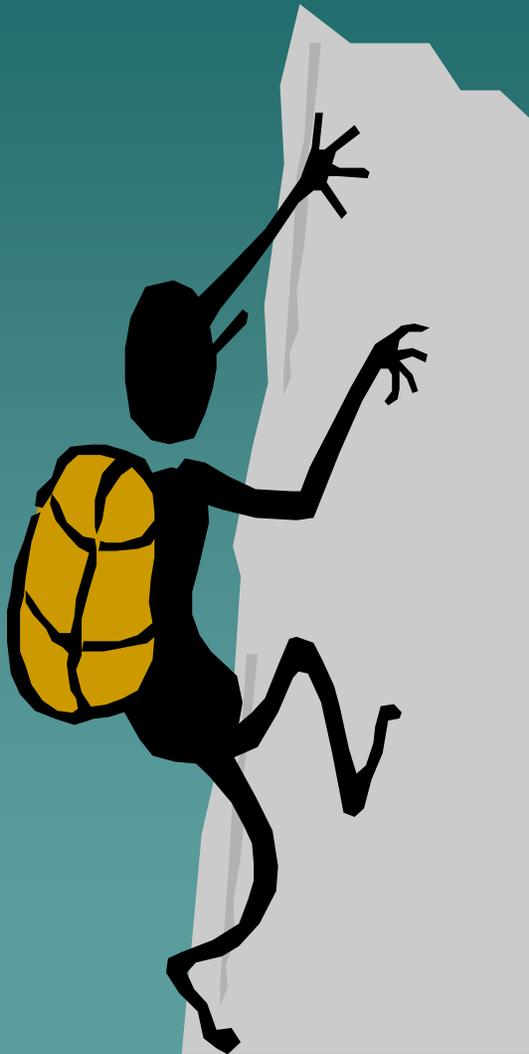
Deficit focus

- ◆ Fragmentation
- ◆ Few new images of possibility
- ◆ Exhaustion and visionless voice
- ◆ Reliance on Experts
- ◆ Dependency on Hierarchy
- ◆ Deficit vocabularies
- ◆ Breakdown in relationships
- ◆ Change is slow

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Strength focus

◆ Enhances relationships

◆ Respects the community and its members

◆ Looks at the whole picture

◆ Produces quick, enduring changes

◆ Helps individualize work

◆ Keeps the intervention focused

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Positive Images
lead to
Positive Action

Examples of positive imagery

◆ Placebo effect

◆ Pygmalion research

◆ Positive emotions fuel resilience, build resources, are contagious in leaders (Barbara Frederickson, POS)

◆ Positive networks (Wayne Baker)

◆ "Now, Discover Your Strengths" (Marcus Buckingham)

◆ Bowling story

4 phases of Appreciative Inquiry

Discovery – Finding what works and when are we at our best – by *Appreciating*

Dream – imagining what might be or how it could be better - by *Envisioning*

Design – determining what should be, the ideal, and how are we going to get there – by *Co-constructing*

Destiny – creating what will be and committing to action – result, *Sustaining*

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A taste of Appreciative Inquiry

◆ Find a partner

◆ Interview each other for 5 minutes apiece

◆ ASK/ANSWER: "What has been a highpoint experience for you in working with your organization?"

◆ OR: "What has been a highpoint experience for you in facilitating organizational change?"

Appreciative Inquiry applications

◆ Global peace development

◆ Community development

◆ Organization development

◆ Leadership development

◆ Team development

◆ Personal development

◆ Child-rearing

◆ And more!

Case #1:
Leveraging strengths in yourself and others

Maximizing the Sweet Spot
(adapted from "Hedgehog Model" - Jim Collins)

◆ Where are you most **passionate**?

◆ Where can you make the most **unique** contribution?

◆ Where can you add the most **value** (and be most valued)?
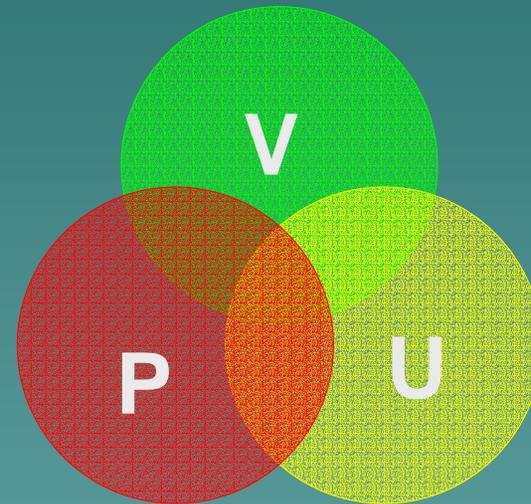
Compare 2 executives referred for coaching

1) Mandate to change (or else!)
2) Invitation to better manage strengths

Who was most engaged?

PACE Matrix

360° PERSPECTIVES		EXPECTATIONS	
Strengths	**Challenges**	Job	
		Boss	
		Organization	
		Family	

ABILITIES		CONTEXT		
Strengths	**Challenges**		**Business**	**Personal**
		Short Term (6-18 mos)		
		Long Term (2-5+ yrs)		

Challenges as opportunities to build on strengths

Strengths	Opportunities
Passionate commitment: inspires others with passion, dedication, and high standards	**Balance toughness with more vulnerability:** recognize when to use edge and how to control; don't try to win every battle
Decisive action-orientation: drills down to key issues, develops a direction, then establishes clear and actionable priorities	**Create open atmosphere** for collaborative problem-solving at all levels; engage people and gain their support; show more trust and respect
Tenacious focus on results: employs a strong work ethic to drive projects to completion and deliver on commitments	**Develop and empower team:** solicit ideas and listen to others rather than dictating own agenda; delegate; coach and develop others

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Case #2a: Appreciating the unique gifts of our children…

Case #2b: …and our pets

Case #3:
Using AI to develop a 25-year community vision

"Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it is the only thing that ever has."

- Margaret Mead
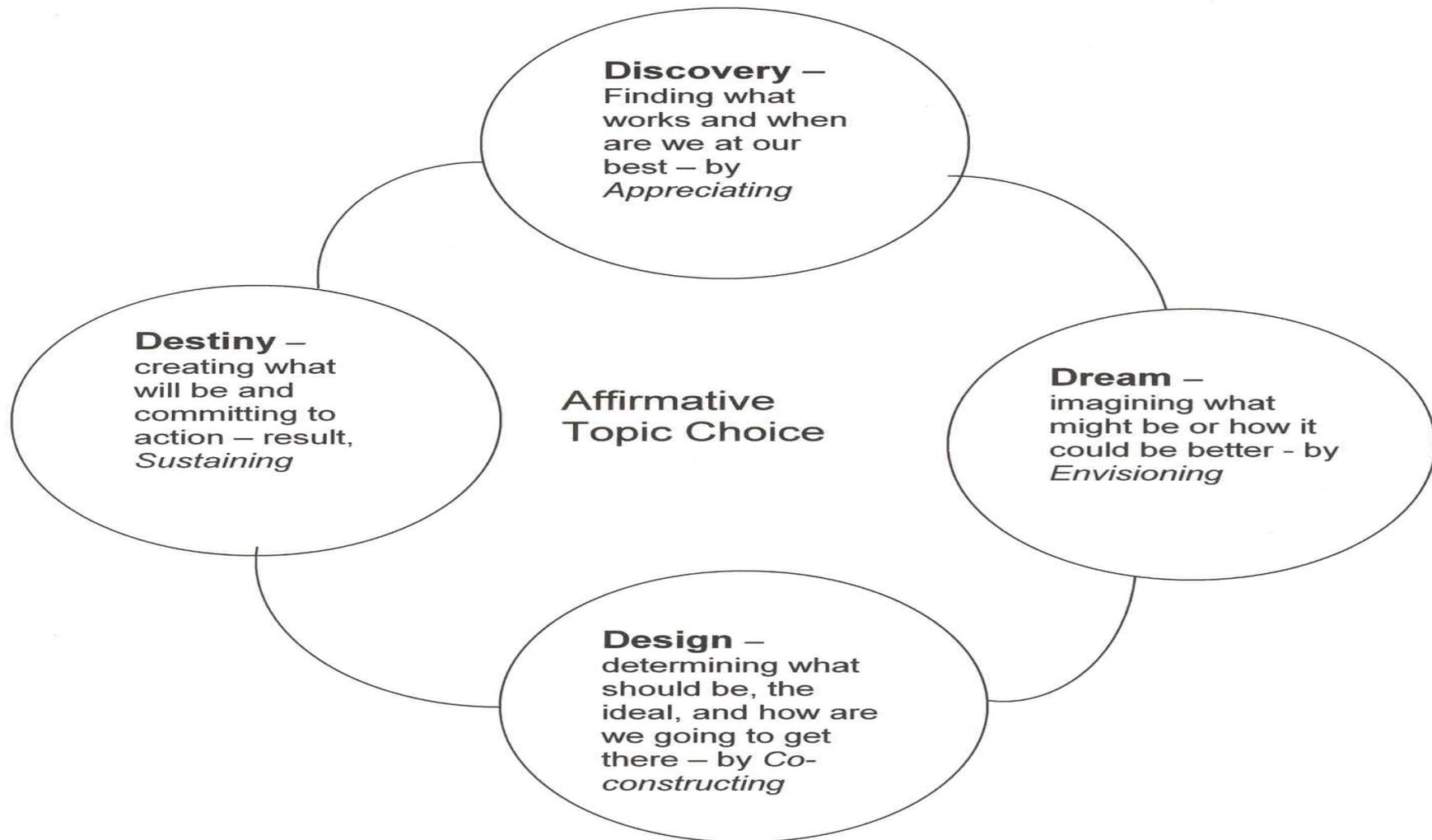
We believed that it was important to have a vision of our future to guide and inspire action.
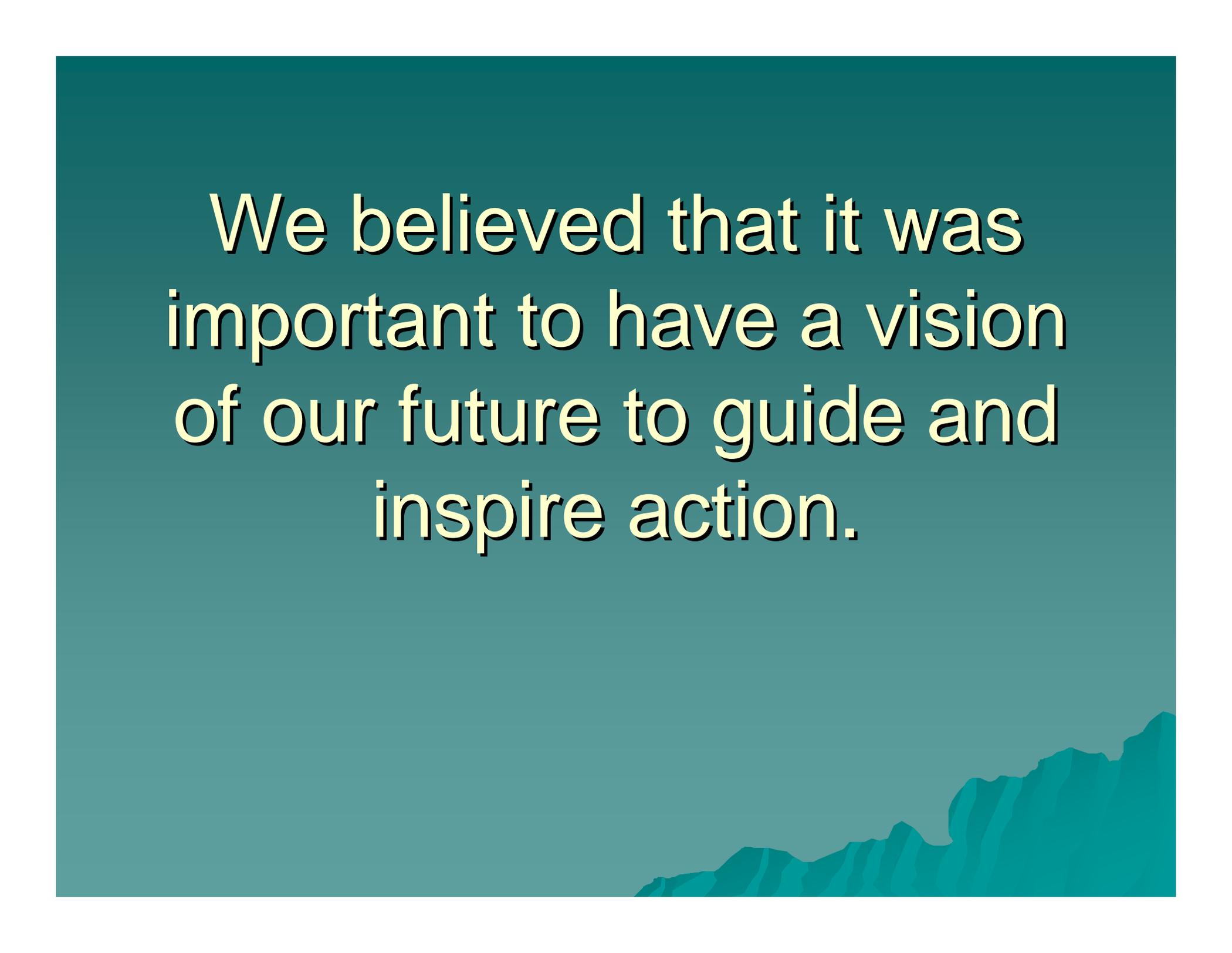
We used Appreciative Inquiry to involve the community.

Discovery — Finding what works and when are we at our best — by *Appreciating*

Destiny — creating what will be and committing to action — result, *Sustaining*

Affirmative Topic Choice

Dream — imagining what might be or how it could be better - by *Envisioning*

Design — determining what should be, the ideal, and how are we going to get there — by *Co-constructing*

Project history

- Initial kick-off meeting on Dec 15
- Appreciative Inquiry training from Dec 20-Jan 26
- Interviews & online surveys completed from Dec 20-Mar 10
- AI "Discover" Summit on January 21
- AI "Dream" Summit on February 18
- Vision workouts on Feb 23, Feb 28, Mar 9, Mar 16
- AI "Design" Summit on March 18
- Reports to City, County, other groups in April - May
- Quarterly "Destiny" Summits starting with OHC Community Summit on May 12

Community participation

- 324 online surveys
- 83 interviews & mailed surveys
- 33 youth surveys
- 100+ at first 3 summits, interviewer trainings, vision workouts, etc.
- 250+ at May 12 community summit

TOTAL: 750+ participants

Surveys & Discover Summit: Appreciating what works

- Natural beauty, outdoor recreation, river, open spaces
- Vibrant small town – historic, rural feel
- Sense of community – friendly, caring
- Government officials who welcome and respond to citizen involvement
- People who get involved – interested in preserving quality of life
- Cultural events – life long learning program
- Great place to raise a family

Identifying our "Positive Core"
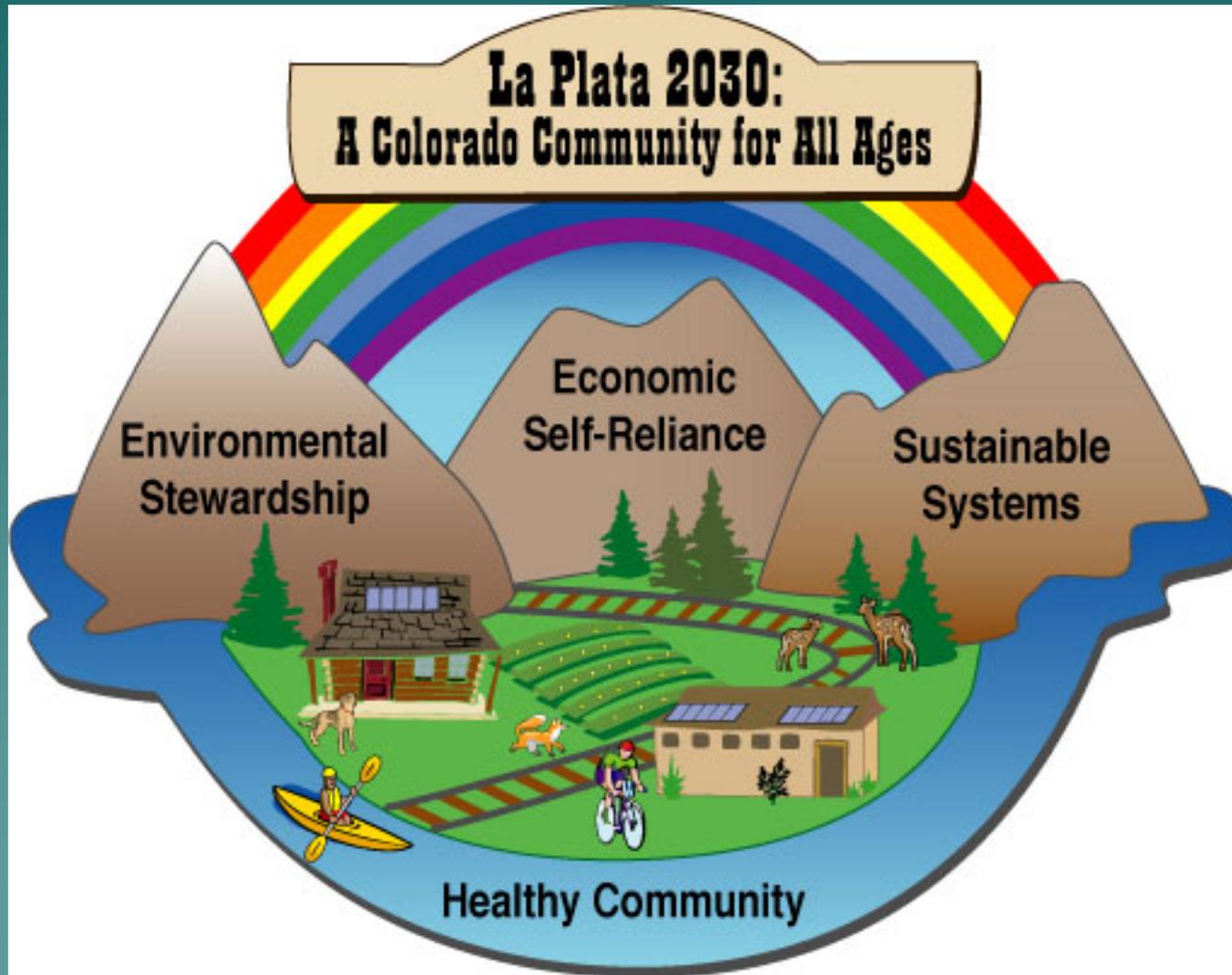
La Plata County: A Colorado Community for All Ages…

A healthy community that invests in sustainable systems while pursuing local economic self-reliance and environmental stewardship for the benefit of future generations who will call this place home.

Dream Summit: Imagining our community in 2030

◆ Preserve small town, rural/agriculture quality of life

◆ Protect river, clean water, clean air, wildlife

◆ Offer diverse and affordable housing options

◆ Support a mixture of local and larger businesses

◆ Offer better, higher paying jobs

◆ Maintain racial, cultural, social and ethnic diversity

◆ Provide better transportation options in county

◆ Improve heath care

◆ More activities and places for youth

Our 25-year vision

In 2030, we celebrate our cultural and intergenerational diversity. Our community's wellness and life-long learning enables everyone to reach their full potential. We use local resources derived from sustainable systems to meet as many needs as possible. We act responsibly as stewards of our ecosystems, evolving in harmony with the natural world.

Guiding principles

1. We believe that everyone is related and interdependent – everyone matters.
2. We respect individual rights, yet we are guided by our concern for the common good.
3. We strive to minimize our ecological footprint.
4. We recognize the vital importance of protecting the water that allows us to live here.
5. We conserve our natural resources, while protecting our lands, wildlife, and air quality.
6. We flourish with sustainable use of our abundant solar energy, agricultural land, and forests.
7. We model human systems on the beauty, efficiency and resilience of natural systems.
8. We shop and invest in our community to create jobs and local prosperity.
9. We leverage our collective knowledge and ingenuity to anticipate and respond to emerging needs.
10. We develop community wisdom and share knowledge central to our success.

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VISIONARY VALUE	Healthy Community
VALUE STATEMENT	We flourish as a community by caring about everyone's needs and supporting efforts to reach our full potential.
VISION STATEMENT	In 2030, we celebrate our cultural and intergenerational diversity. Our community's wellness and life-long learning enables everyone to reach their full potential. We use local resources derived from sustainable systems to meet as many needs as possible. We act responsibly as stewards of our ecosystems, evolving in harmony with the natural world.
BACKSTORY - Grassroots Vision Survey	The 2006 Grassroots Vision Survey revealed that people appreciate the real sense of community here, where people experience a sense of belonging. We value our friendly, caring, concerned residents who participate as volunteers in various organizations and activities, people from diverse backgrounds who are passionate about getting involved and preserving their quality of life. We value government officials who welcome and respond to citizen involvement. We appreciate opportunities for lifelong learning and education at Fort Lewis College; cultural events and amenities including local restaurants and the arts; local options for recreation and healthcare (i.e., Rec Center, Mercy Medical Center, alternative health providers). We hope for increased city/county collaboration and cooperation along with the adoption of guiding principles.
Guiding Principle 1	We believe that everyone is related and interdependent – everyone matters!
Guiding Principle 2	We respect individual rights, yet we are guided by our concern for the common good.
Guiding Principle 9	We leverage our collective knowledge and ingenuity to anticipate and respond to emerging needs.
Guiding Principle 10	We develop community wisdom and share knowledge central to our success.
STRATEGY 5	Create new public spaces (i.e., "third places") for people to come together in new ways.

5.1	Action	Lead Role	Potential Partners	Indicators	Timeline
Research	Assess existing and potential open civic spaces. (NOTE: Consider both indoor meeting and outdoor gathering places)	Durango Planning (Greg Hoch) & Durango General Services (contact Roy Peterson)	Durango Community Planning Dept.	Knowledge of existing and potential open civic spaces.	to be determined

5.2	Action	Lead Role	Potential Partners	Indicators	Timeline
Civic spaces	Develop more civic spaces for celebrations, art and food/farmers market/fun. Create a citizen task force to explore options, including funding the purchase of existing commercial space to convert to civic areas. Work with County on plan for new	Durango (contact Greg Caton & Bob Kunkel); La Plata (contact Joanne Spina)	Business community; OHC; Parks & Rec Dept; Convention Center Committee; Fairgrounds; 4-Corners Back Country Horsemen	Task Force created with City and County endorsement.	to be determined

SAMPLE

First Destiny Summit:
Creating community projects
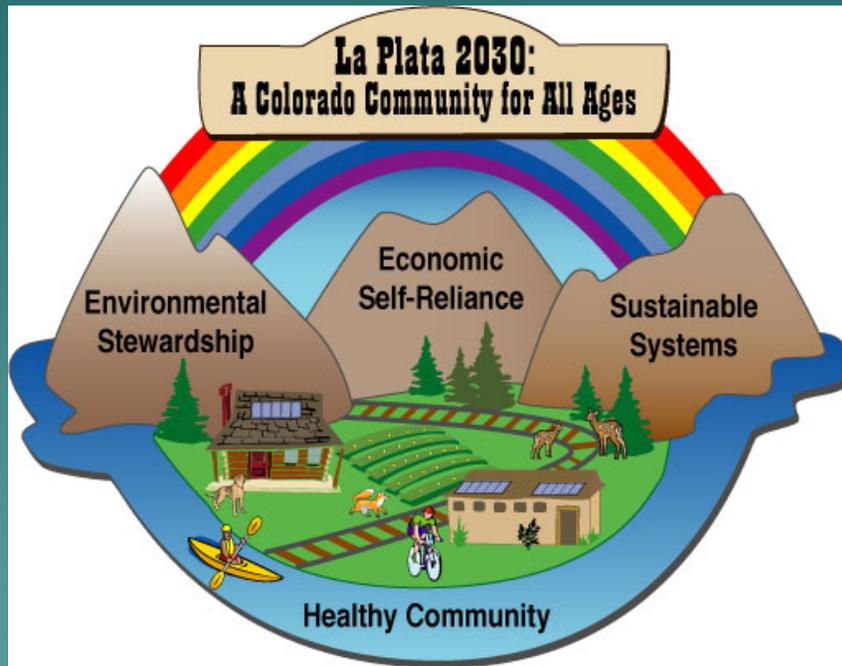
- Community healthcare
- Positive youth development
- County-wide transit
- Affordable housing
- Living wages

Destiny… to be continued

- Refine strategies & action steps
- Form Community Vision Teams
- Identify Lead Partners & others
- Expand Steering Committee
- Hold "Vision Fair" in the fall
- Incorporate vision, strategies and action steps into city/county planning

Case #4: Finding that things can go wrong with Appreciative Inquiry, just like other change projects…

What kind of impact did AI have when the executive sponsor retired, the original AI champion left, and there was no political support for anything positive?

Case #5:
Facilitating change
through innovation

What is innovation?

◆ "The process of harnessing creativity to create new value in new ways through new products, new services, and new businesses" (Jonash & Sommerlatte, *The Innovation Premium*)

◆ "Turning new ideas into stakeholder benefit" (Holt)

The "Japanese Bill Gates" challenge: One company's quest for innovation
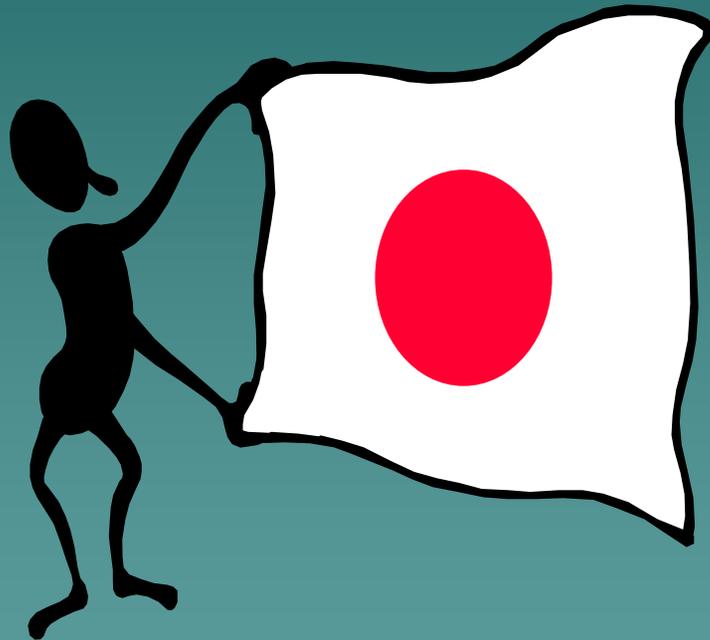
- Intelligence
- Personality
- Potential
- Behavior
- Experience
- Learning
- Motivation
- Environment

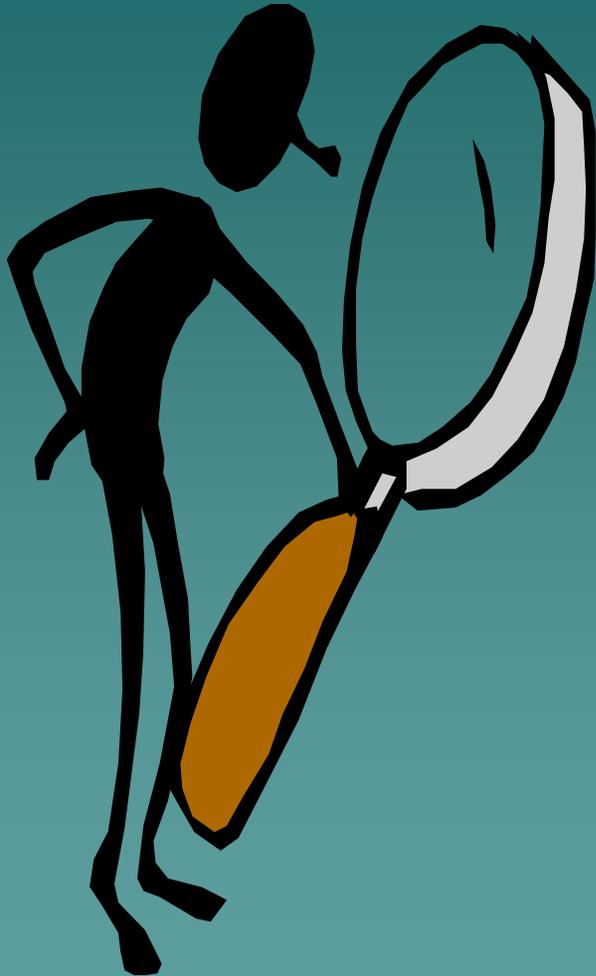*Facilitating Organizational Change by Katherine Holt*

KAI (by Michael Kirton)

Adaptors try to resolve problems; want to improve the system and do things better

Innovators look for new possibilities; want to change the system and do things differently

Peakinsight research:
Innovation inquiry

- ◆ **Strategic focus**: Is innovation a leadership priority?
- ◆ **Organizational culture**: Where is innovation alive?
- ◆ **People**: Who plays a role in innovation?
- ◆ **Processes**: What drives ongoing innovation?
- ◆ **Opportunities**: How to enhance and leverage innovation?

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"We create happiness in our theme parks. We want potential cast members to have a great time going through the hiring process, and walk away feeling good."
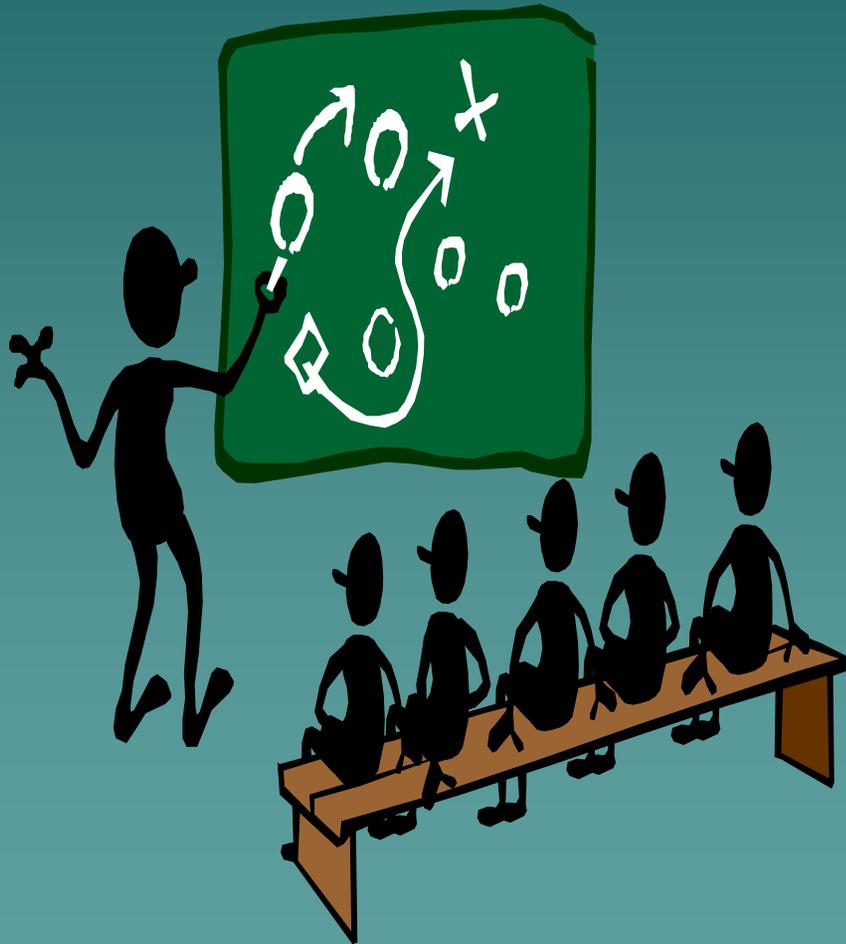
-- Larry Lynch, Disney

Best people practices for innovation
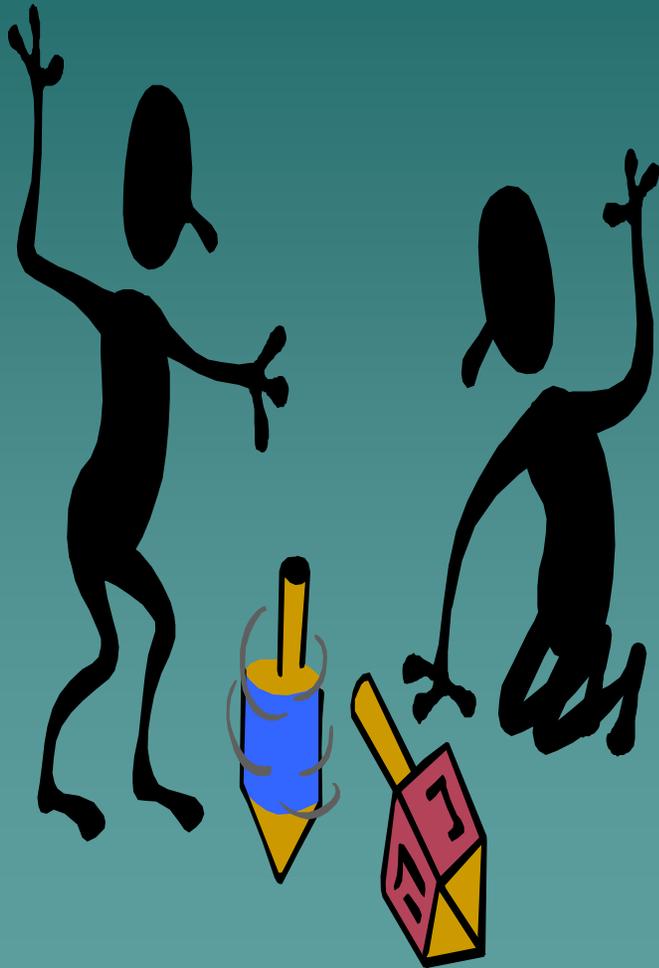
- ◆ Recruit
- ◆ Hire
- ◆ Cultivate
- ◆ Encourage
- ◆ Support
- ◆ Leverage
- ◆ Play
- ◆ Celebrate

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Innovation Horizons®

1. Scout
2. Inquisitor
3. Networker
4. Collaborator
5. Catalyst
6. Builder
7. Prototyper
8. Evangelist
9. Challenger
10. Customer advocate
11. Ecologist
12. Cultivator

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Example: Scout role

Scouts explore new frontiers to identify innovations and growth opportunities
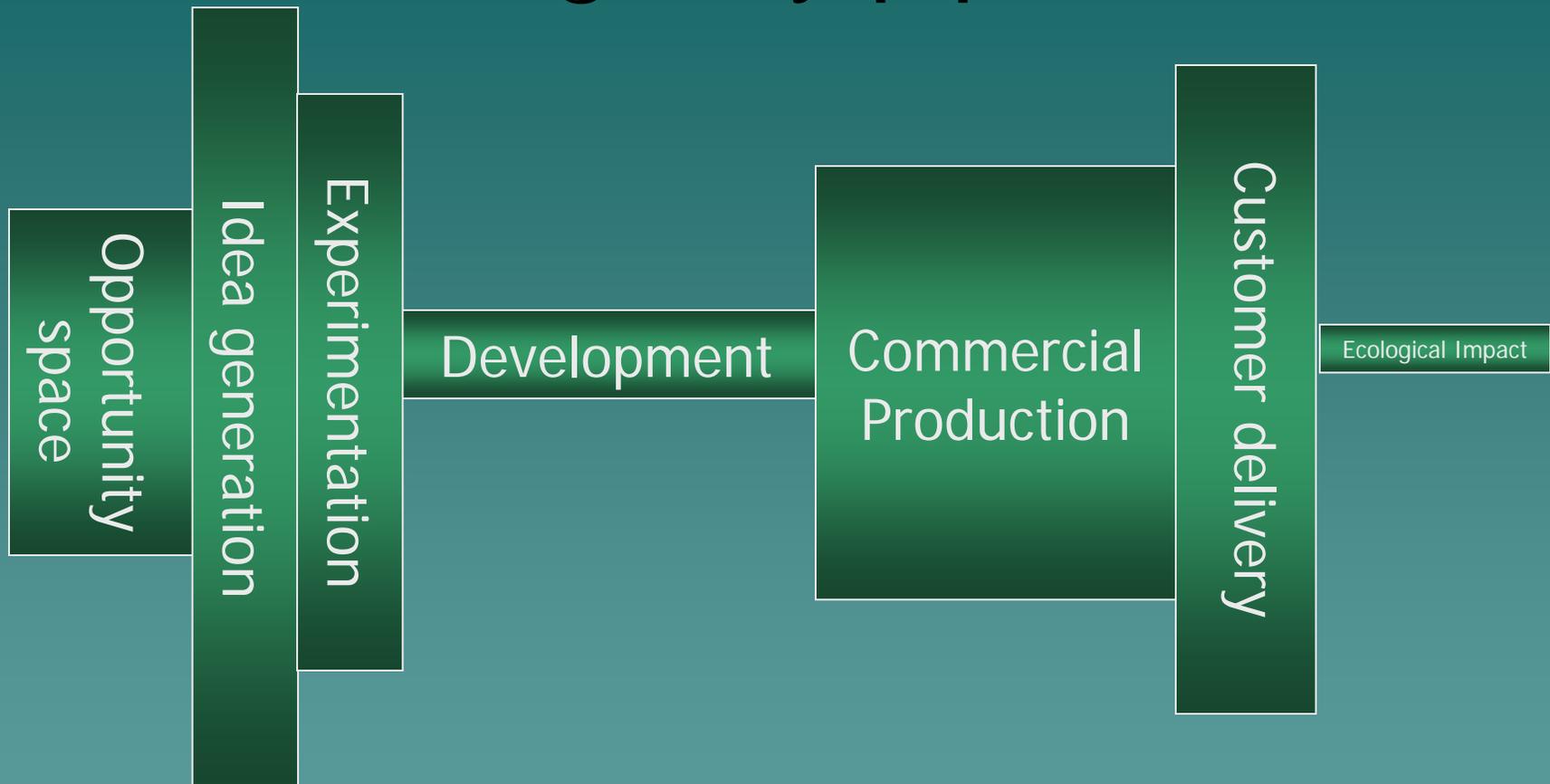
Example: Scout 360 behaviors

1. Scan and monitor revolutionary developments in other industries
2. Search for problems that seem to have no current solutions
3. Seek inspiration for innovative solutions from sources on the fringe
4. Sense emerging opportunities that could be seized for competitive advantage
5. Construct future scenarios, anticipating how trends may impact and shape the industry

Many choices for building innovation capacity
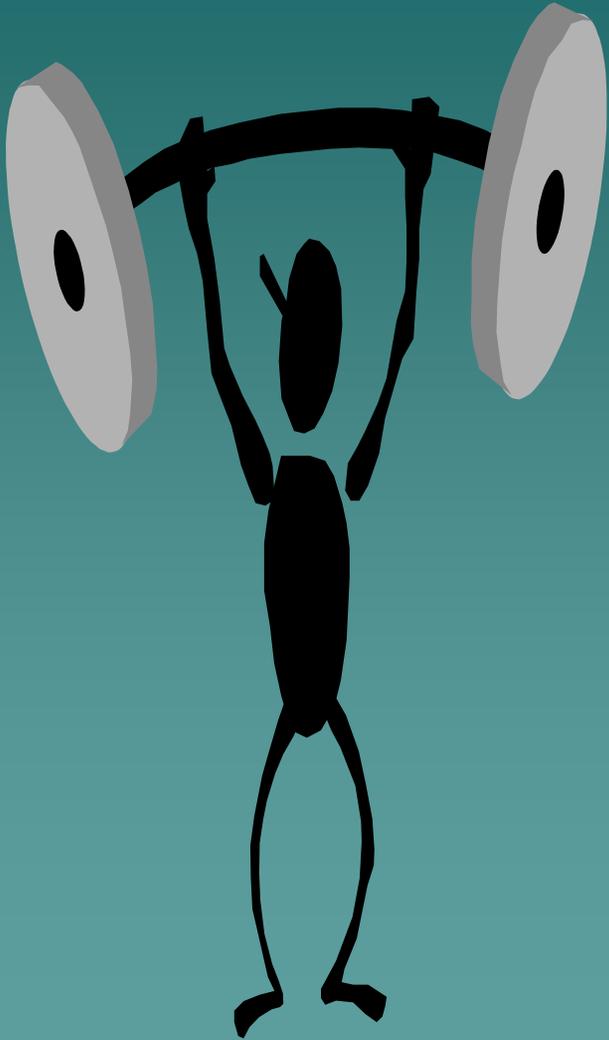
- ◆ Acquire promising new technologies

- ◆ Increase new product development efforts

- ◆ Hire more R&D

- ◆ Deploy diverse, cross-functional teams

- ◆ Encourage innovation mindset & passion for risk-taking in culture

Imaginary pipeline

Opportunity space

Idea generation

Experimentation

Development

Commercial Production

Customer delivery

Ecological Impact

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AI/Change dialogue

◆ What is the positive core in your own organization?

◆ Imagine your organization in 2016. What do you see?

◆ What role could you play in the change?

◆ What is your first step?
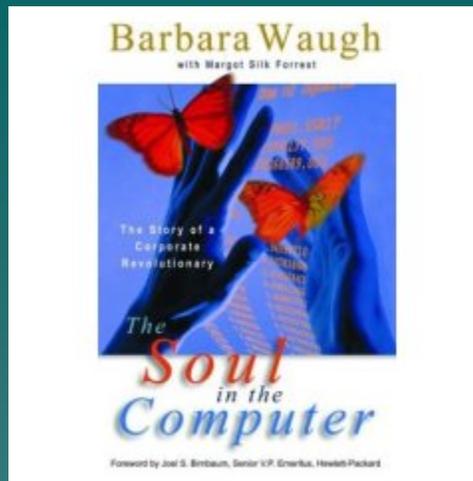
Advice from a Revolutionary:
1. Remember who you work for
2. Amplify positive deviance
3. Scale up, scale down

-- Barbara Waugh, HP

Key points

AI can be used to:

◆ Access collective wisdom about what gives life to organizational systems

◆ Inspire people to imagine possibilities for innovation and change

◆ Engage personal commitment and strategic alignment for implementing change

Facilitating Organizational Change Certificate Program

- ◆ Conduct diagnostic assessments
- ◆ Analyze data to provide feedback
- ◆ Understand change management theories
- ◆ Select an appropriate change model and design a strategic plan for change
- ◆ Create implementation designs that involve and inspire formal and informal leaders
- ◆ Develop communication plans
- ◆ Manage consequences

AI training

◆ June 13-16 (Taos, NM) - Being AI: A Spiritual Retreat for Change Agents

◆ Sept. 18-21 (Chicago) - Appreciative Leadership Development Program

◆ Oct. 16-20 (Taos, NM) - Foundations of Appreciative Inquiry

◆ Nov. 15-17 (Boulder, CO) - Appreciative Inquiry in Action

◆ Appreciative Inquiry Certificate Program

http://www.positivechange.org/appreciative-inquiry-certificate-program.html

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Resources

◆ Cooperrider, D.L., Sorensen Jr., P.F., Whitney, D. & Yaeger, T.F., Editors (2005). *Appreciative inquiry: Rethinking human organization toward a positive theory of change*. Champaign, IL: Stipes.

◆ Cooperrider, D.L. & Whitney, D. (2005). *Appreciative inquiry: A positive revolution in change*. San Francisco: Berrett-Koehler.

◆ Cooperrider, D.L., Whitney, D. & Stavros, J.M. (2003). *Appreciative inquiry handbook: The first in a series of AI workbooks for leaders of change*. Bedford Heights, OH: Lakeshore Communications.

◆ Ludema, J.D., Whitney, D., Mohr, B.J. & Griffin, T.J. (2003). *The appreciative inquiry summit: A practitioner's guide for leading large-group change*. San Francisco: Berrett-Koehler.

◆ Whitney, D. & Trosten-Bloom, A. (2003). *The power of appreciative inquiry: A practical guide to positive change*. San Francisco: Berrett-Koehler.

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What are YOUR questions about fostering organizational change?
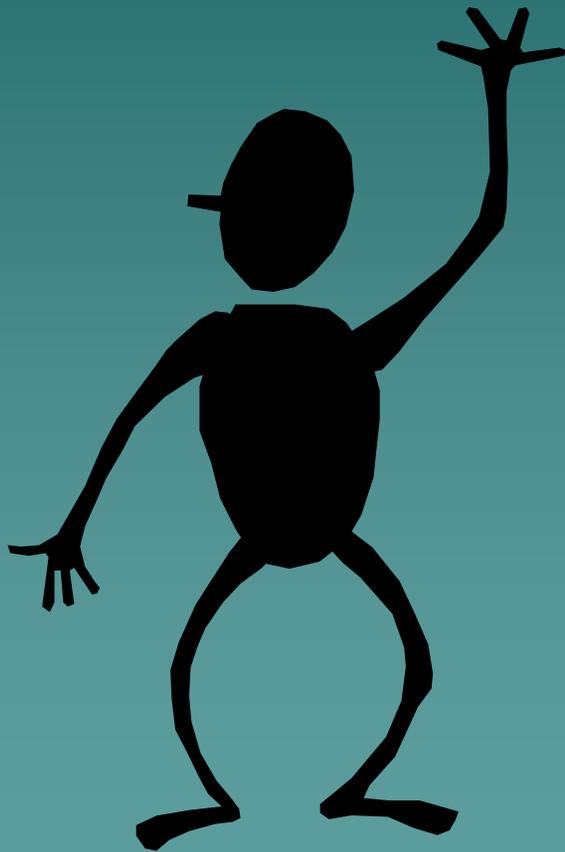
- ◆ Ask now
- ◆ Ask after session
- ◆ Call Katherine later at 970-247-1180
- ◆ Send email later to: katherine@peakinsight.com

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