



As a college professor and new practitioner of Appreciative Inquiry, I was convinced that AI's strengths-based approach to organizational change could pay big dividends in my academic division. One colleague described our use of AI in the strategic planning process as "efficient yet engaging, inclusive yet productive; it utilized AI techniques in a way that felt authentic and allowed for criticisms and concerns to be voiced . . . and **it culminated in a strong product that well represents our Division.**"

~ Kristin Novotny, Ph.D. (2014)

What would it look like if... Appreciative questions guided strategic planning?

Define success up-front.

Discuss what the best possible planning process would look like. Which values do you want to maximize: Inclusion? Efficiency? Expertise? Learn from past successes and near misses. In our case study, a past planning effort was described as "busywork" with no widespread buy-in or lasting impact. This time, a planning team used AI to envision a far different process in which "genuine excitement for the work would be generated," resulting in a strategic planning document truly reflective of who the academic division is, what it wants, and why it matters.

- What are **your** organization's hopes and goals for the planning process?
- Will AI be a visible part of the process, or simply used as an underlying framework? Either can work well, and the best choice will vary with the group.
- What will you do to foster a sense of ownership in the process?

Bake your core values into the process.

Identify values that you want in the end product and integrate them into the planning process itself. The academic division in our case study places high value on the inquiry process and on autonomy – a natural fit with AI. Autonomy was built into the process through multiple levels of participation (with opportunities for individual, small group, and whole division work), and inquiry was incorporated via appreciative questions.

- What values does **your** organization hold dear?
- How are these values reflected and reinforced in the proposed planning process?
- Are there other ways these values can inform the process?

Consider the value of a planning team.

Assemble a committed team. A small planning team can design a process that will guide the actual work of strategic planning. In our case study, the person leading the process was trained in AI, explained the AI approach and attracted a volunteer planning team. Together the team designed a process that embodied AI principles without requiring the entire division to become fluent in AI theory. As this leader put it: "I did not always *talk about* the fact that I was using AI, but I built it into every process."

- What is the best, most inclusive way to assemble a planning team in **your** organization?
- Is your planning group representative of the larger community or organization?
- Is the planning process itself sufficiently transparent?



Maximize input; minimize stress.

Strive for both inclusion and efficiency. The success of our case study relied on a carefully considered process designed for maximum faculty input with varying levels of participation. It provided space for as many voices as possible, while simultaneously acknowledging the demands on everyone's time and using it wisely. A combination of pre-planning via email, small planning team meetings and division-wide meetings was used. Areas that were critical and non-negotiable (e.g., the time period covered by and scope of the strategic plan) were identified in advance.

- Is **your** organization's process one that colleagues will want to invest their time in? Is the workload staggered, equitable and well-timed?
- Is your process respectful of time commitments, and does it incorporate alternatives to face-to-face meetings?
- Does your process foster genuine participation? Does it allow differing voices to be taken seriously, while building agreement around common values and goals?
- Are there any "givens" or non-negotiable items that your plan should cover, and if so, are they clear?
- Can your plan accommodate last-minute changes? Is it flexible enough to enable you to "read the room" and make adjustments as necessary?

Design powerful, generative questions.

Make appreciative questions the basis of your process. The most important way that the team in our case study built AI into the strategic planning process was by incorporating appreciative questions. The team leader was influenced by the words of Gervase Bushe, who wrote: "What entrances so many people about AI is the ability of a well crafted appreciative question to build rapport and energy." After the questions were drafted, the planning team reality-tested and reframed some of them to avoid the dreaded "eye-roll" reaction. The resulting questions met the department where it lived and produced meaningful engagement among its members.

- Do **your** organization's questions explore current strengths, invite a compelling vision of the future, and help chart a practical path forward?
- Is the question language well matched to the vocabulary and concerns of the participants?
- Will the questions be perceived as having integrity and substance? Will they invite honest reflection?
- Can the questions be provided ahead of time to foster greater reflection?

Let people know their voices have been heard.

Gather feedback and use it in the strategic plan. A meaningful strategic plan needs legitimacy and credibility. To foster this, our case study's planning team made sure to use the interests that had been expressed via appreciative questioning in its draft of the strategic plan. According to one participant, "we had a sense that our feedback was important, and that this was a vision we were generating together."

- Does **your** organization's strategic plan identify the major priorities and initiatives that arose from stakeholders during the appreciative question phase?
- Does the plan lay out a vision for the future that is engaging and exciting, and that identifies appropriate first steps and milestones?
- Does it affirm the organization's identity in a way that feels authentic?

Trust the process.

Commit to an iterative and reflective process, even when the going gets tough. Even when questions are appreciatively framed, a meaningful planning process will uncover negative comments and feelings towards the organization. These are normal; as the team leader in our case study says, "a good process is the key to addressing conflicts large and small." Ultimately, the planning team very much "trusted the design of the process to create a safe container for faculty concern[s]."

- Does **your** organization's process provide a safe environment for concerns/dissent to be heard and meaningfully addressed?
- Is leadership able to trust the process enough to step back from it when needed?
- Does this process foster an environment in which people will be trusted enough to truly carry out elements of the design?

