



COLLECTIVE IMPACT FORUM



Using Appreciative Inquiry to Set a Collaborative Vision

National Veterans Intermediary | October 29, 2019

Today's presenters



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Director of Programs
Collective Impact Forum



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Director
FSG

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

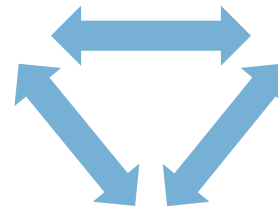


FSG facilitates effective cross-sector collaboration in three mutually reinforcing ways

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



LEARNING COMMUNITY



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

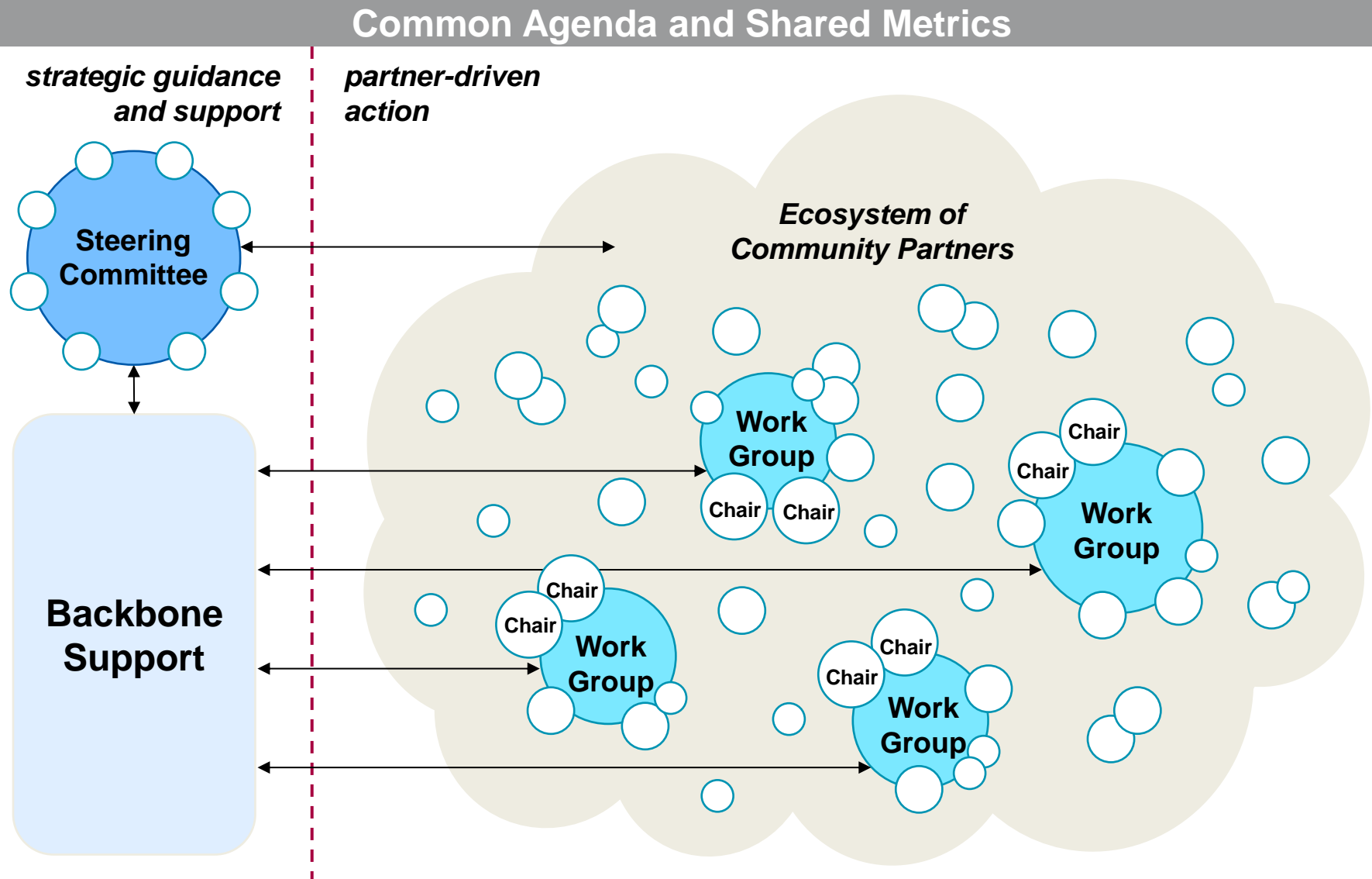
Backbone support

- Dedicated **staff**
- Resources and skills to **convene** and **coordinate** participating organizations

How long does the process of collective impact usually take?



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

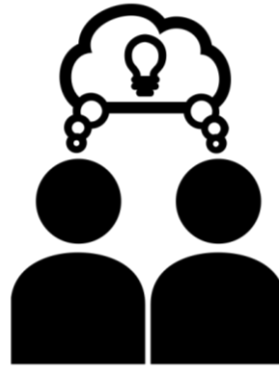
Backbones must balance the tension between coordinating and maintaining accountability, while staying behind the scenes to establish collective ownership

Several elements make up a common agenda



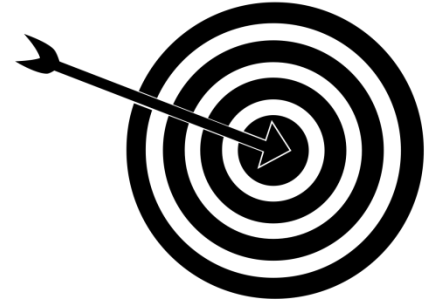
PRINCIPLES

How are you going to work together?



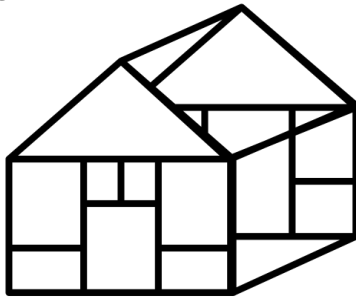
PROBLEM DEFINITION

What is in and what is out?



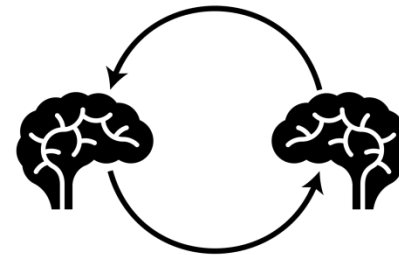
GOAL

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

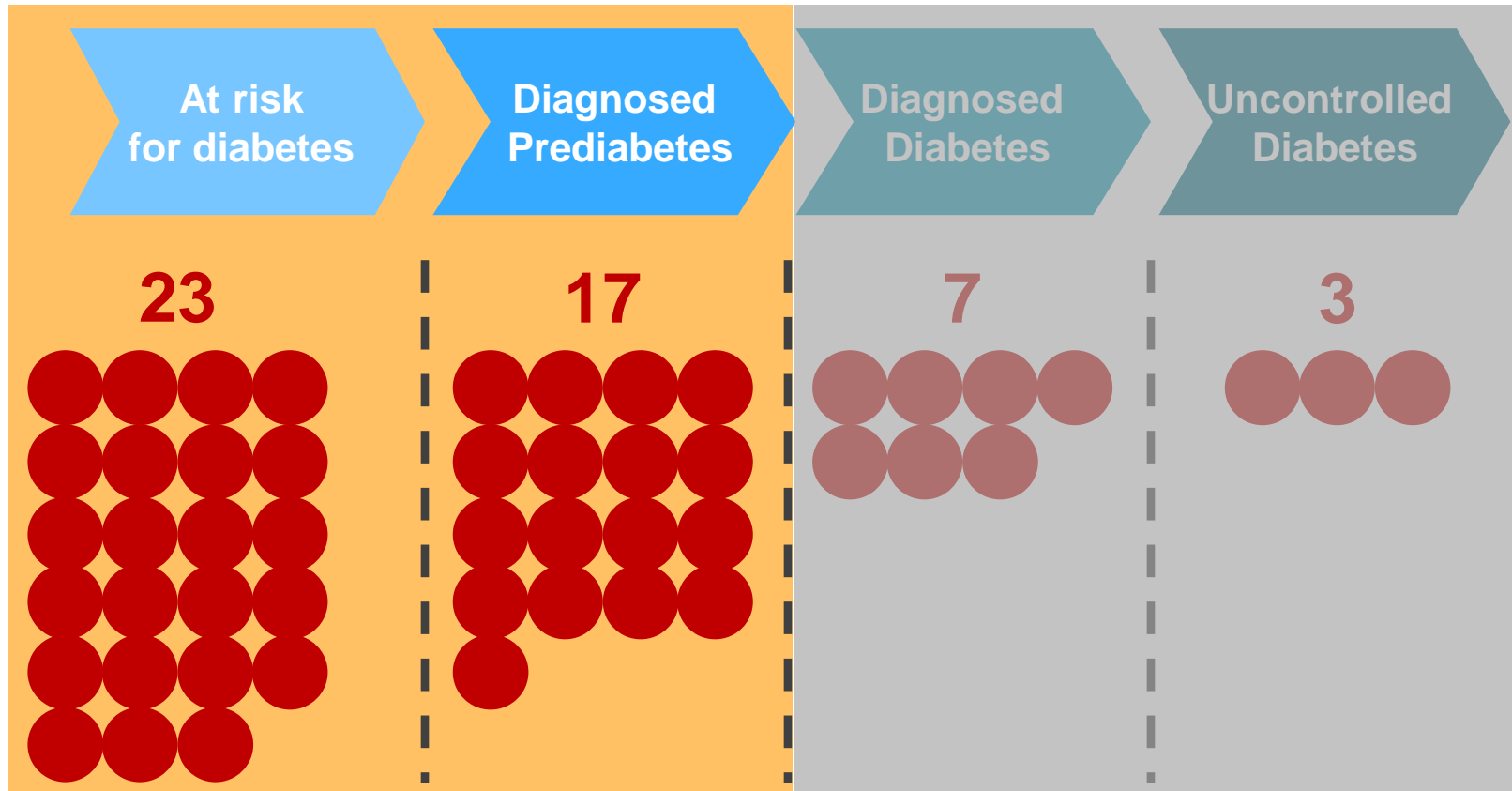
Empower people and families

How to define the problem

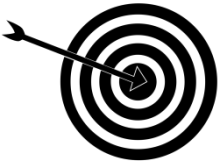


Key Considerations

- Set boundaries
- Use quality data to inform thinking
- Allow to change over time



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.

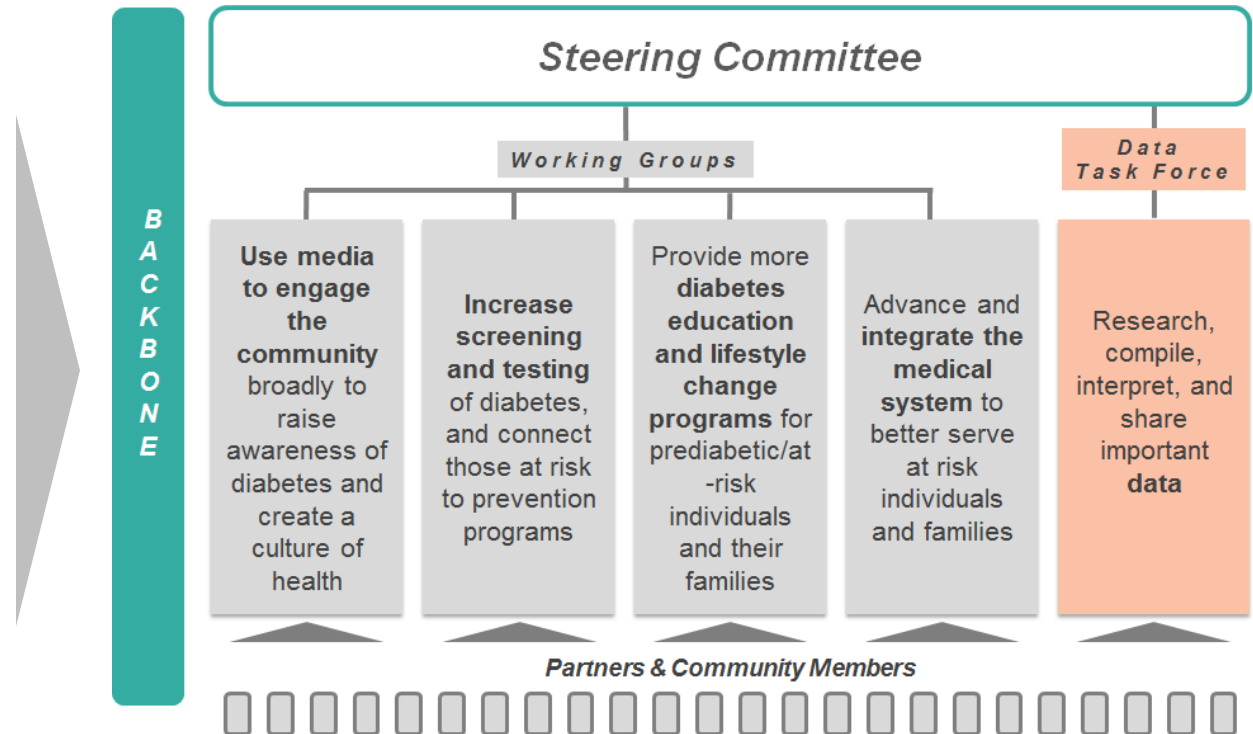
How to build your framework for change



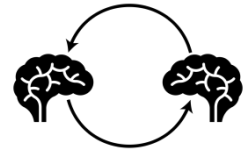
Key Considerations

- 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



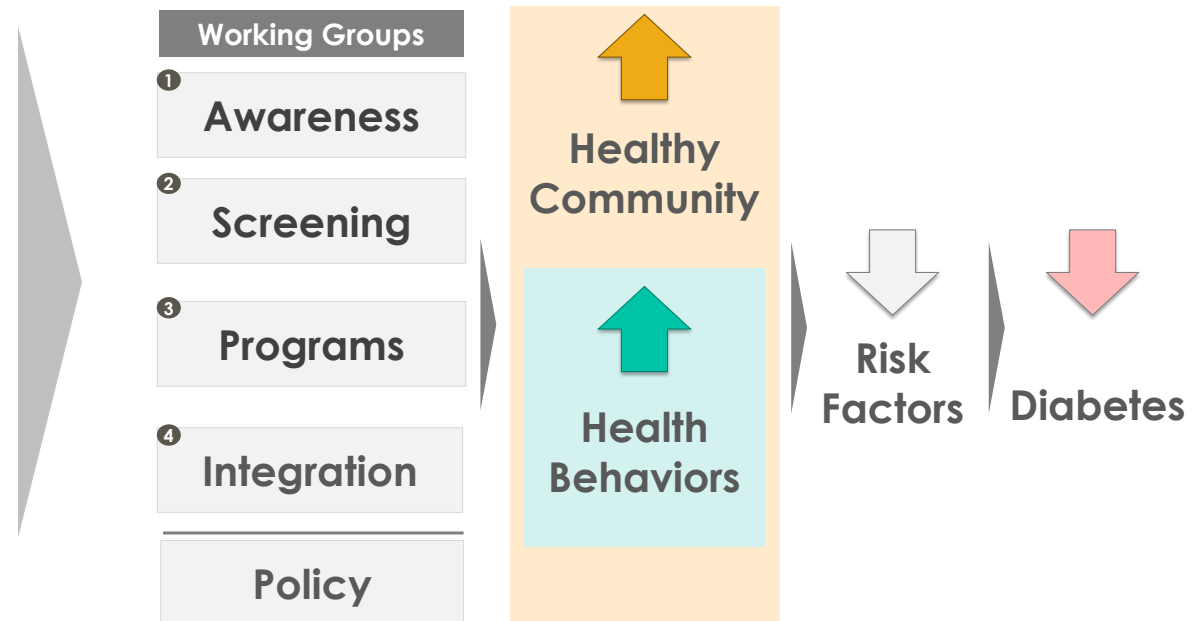
How to plan for learning



Key Considerations

- Incorporate early thoughts on shared measures
- Note change on different scales
- Strongly emphasize learning

Illustrative Example

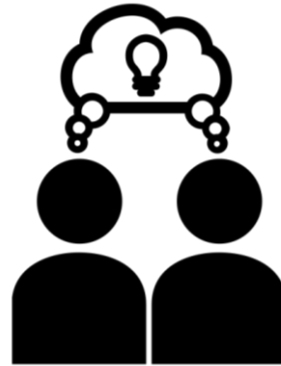


Group discussion: where are you in developing your veterans-serving collaborative's common agenda?



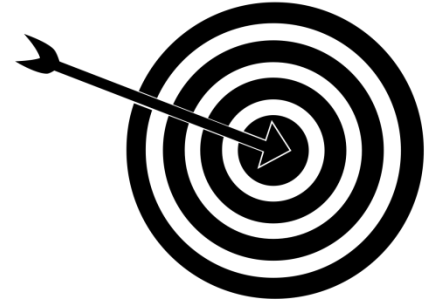
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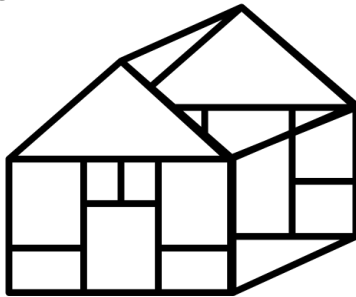
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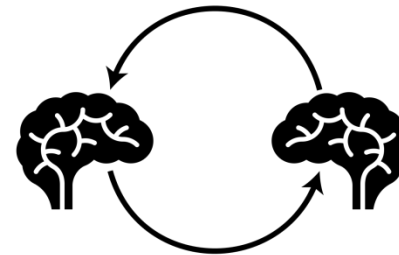
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PLAN FOR LEARNING

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Using Appreciative Inquiry to Establish a Collaborative Vision

The five conditions build a foundation for collective impact, but leadership is necessary to achieve results



Progress in collective impact

Level One Progress:
Incremental

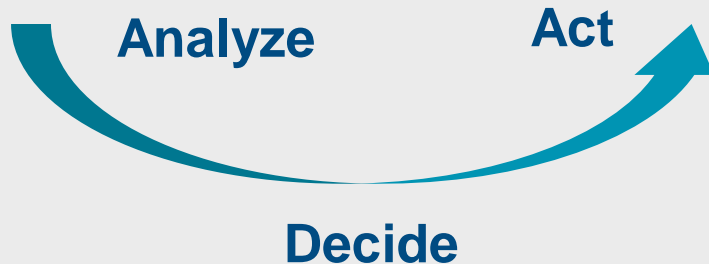


**Level Two Progress:
Transformational**

*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

Most Change Processes

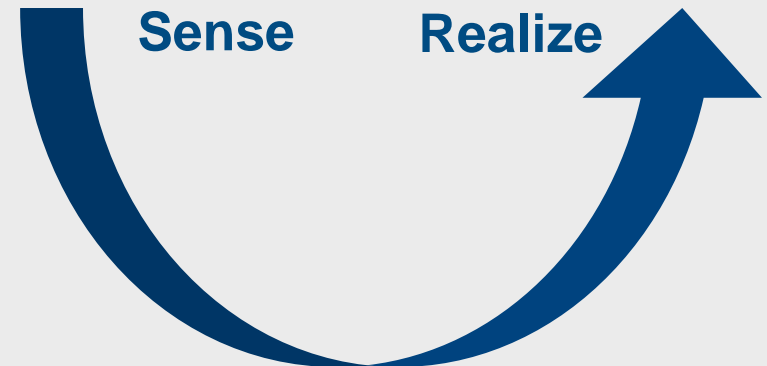


VS

Transformative Change Processes

*"Observe,
observe,
observe"*

*"Act swiftly,
with a
natural flow"*

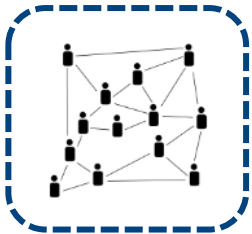


Presence

*"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



Foster reflection and generative conversation



Shifting collective focus from reactive problem-solving to co-creation

Tools

Actor Mapping

Learning Journeys

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

*** 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)
- Increased program participation
- Increased rates of physical activity among target population

ULTIMATE GOAL

INTERMEDIATE OUTCOMES (3-5 years)

SHORT-TERM OUTCOMES (1-3 years)

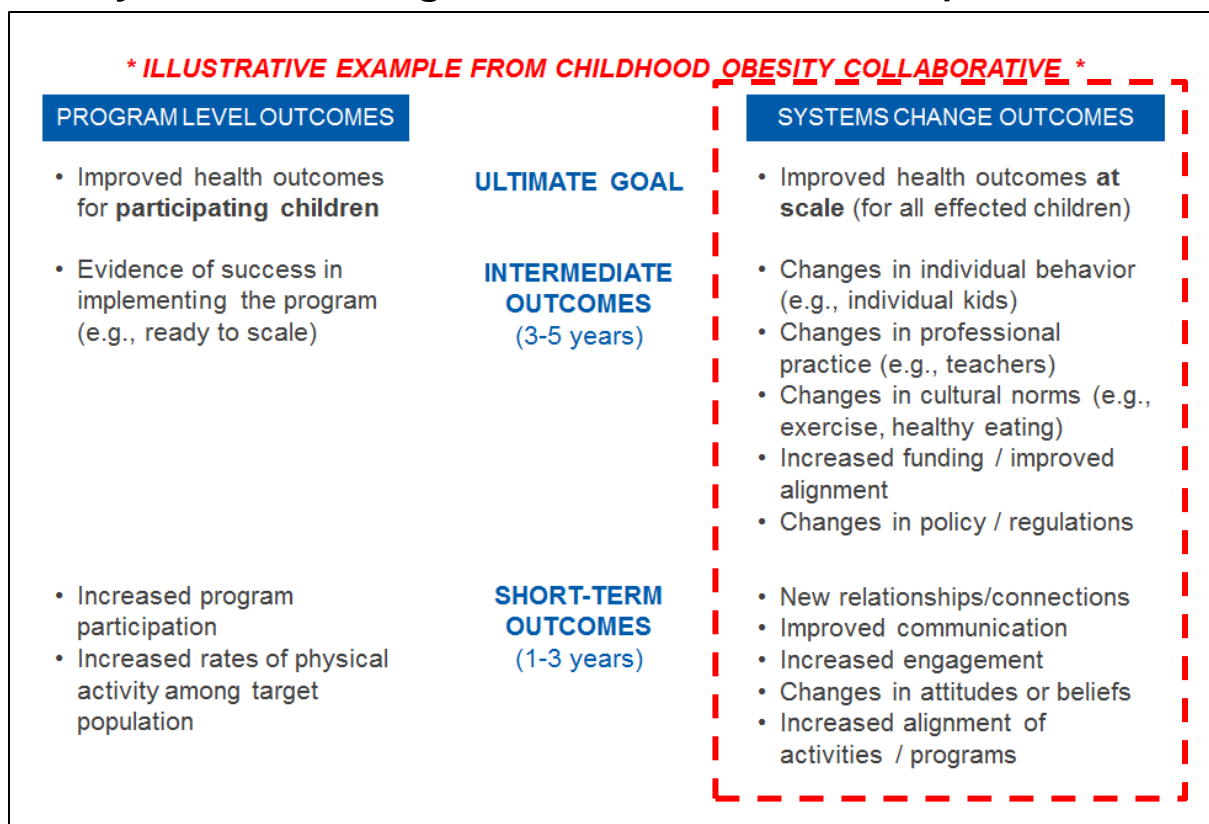
SYSTEMS CHANGE OUTCOMES

- Improved health outcomes **at scale** (for all effected children)
- 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

Appreciative Inquiry exercise

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

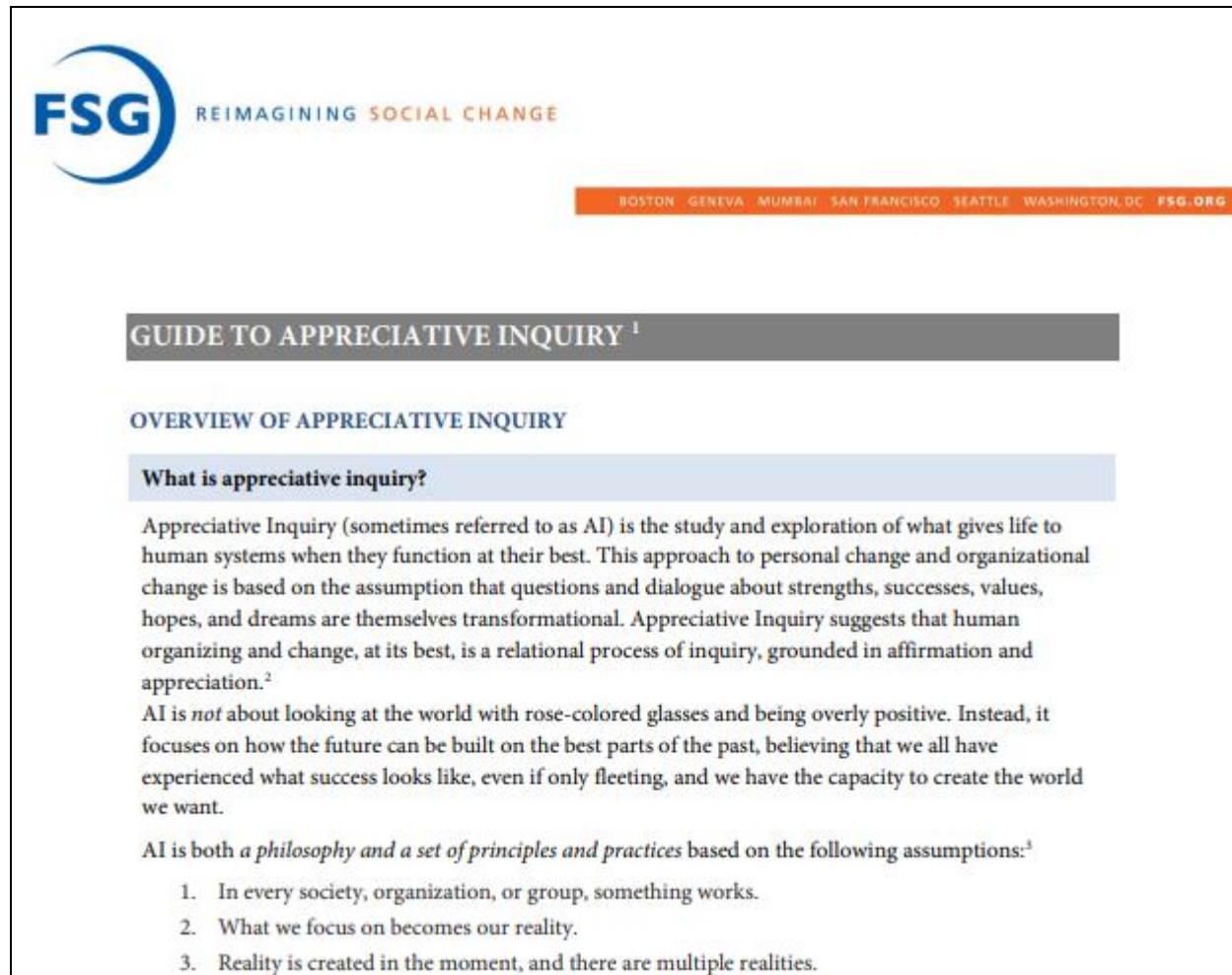
As you reflect on your own (and as a group), remember these illustrative systems change outcomes from the prior slide:



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



Visit <https://www.fsg.org/tools-and-resources/guide-appreciative-inquiry> to access FSG's Guide to Appreciative Inquiry

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

Warm-up Exercise #2: for meetings with a new group to strengthen alignment and trust among partners

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?



Mark Your Calendar for Other Upcoming Collective Impact Learning Opportunities for the NVI Community

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***