

Expanding the Reach of the Appreciative Inquiry Summit with Collaborative Technology

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As collaborative technologies have matured in the past decade, dramatically dissolving time and space as external barriers to human communication, AI practitioners have started to explore the possibilities of using such technologies to enhance the impact that Appreciative Inquiry can have in dissolving internal and social barriers to human collaboration and cooperation. This article describes how a variety of technologies are being integrated into a design that aims to give rise to the largest social responsibility summit ever held and break new ground with the AI Summit method.

Background

Early explorations in integrating web-based technologies to enhance a Summit design enabled more than 5000 World Vision employees to provide input and feedback electronically to the 150 stakeholders who gathered face-to-face for a four day Summit (see L. Godwin and S. Kaplan elsewhere in this issue). Speaking of the impact of that expanded Summit, World Vision Senior VP Watt Santatiwat, said:

It's been incredibly powerful to include thousands of people in the process. Not only did we develop more robust strategies, we saved money and time and created a new model for participation and collaboration.

While the World Vision Summit stands as a milestone in the use of technology to support AI processes, the design was restricted to asynchronous (not real-time) technologies for input and feedback. It did not call for integrating a central Summit gathering with multiple other locations and virtual participation in real-time.

An Expanded Opportunity Arises

The opportunity to engage distributed and virtual participants in a Summit process in real-time arose in 2007 with a project initiated by the American Society of Association Executives (ASAE). ASAE is often referred to as the 'association of associations.' Founded in 1920, its 22,000 members are senior executives and emerging leaders at 10,000 professional and trade associations that represent more than 287 million people and organizations worldwide.

In the winter of 2007, Susan Sarfati, Executive VP of ASAE and CEO of the Center for Association Leadership (ASAE & The Center), convened a group of staff members to consider ways to galvanize the association community to be more proactive in the areas of sustainability and social responsibility (SR). Coincidentally, ASAE was sponsoring its annual Technology Conference and Susan attended a presentation featuring the World Vision case study. Having herself participated in an AI change process some years earlier, Susan proposed to her staff that they undertake a global AI process to engage the association community in addressing SR issues.

ASAE engaged OvationNet, a partnership between David Cooperrider and iCohere, Inc., to design and facilitate a Global Summit on Social Responsibility. The intent of the Summit is summarized in OvationNet's proposal:

Energizing Associations and their Business Partners as Agents of World Benefit is an ambitious multi-year undertaking that will call on the association community and its business partners to join together in new ways to rise above currently defined notions of self-interest and organizational mission. As such, this initiative is not only a big undertaking logistically... but it is an even bigger undertaking socially, psychologically and spiritually: For it seeks to elevate the essential self-understanding and commitments of the association community and its partners to new horizons. These new horizons will unfold creatively as participants from hundreds of associations and partner organizations reflect upon and take responsibility for how their organizations can serve the higher purposes of their respective professional and industry domains.

In addressing its members, ASAE said:

The world's issues are too complex for a single organization to tackle. However, by joining forces, our achievements will be greater than our individual efforts. More than 287 million people in every industry, profession and social cause are represented around the world by ASAE & The Center's members and their organizations. Imagine what we could accomplish in terms of helping society, the global economy and the environment if we all work as individuals, organizations and as a sector - toward positive change.

More specifically, the anticipated outcomes from the Summit operate at the following actionable levels:

Engage a large number of associations and industry partners in a process that will lead them to recognize the remarkable opportunity for broader service available to the association community and accept responsibility for acting on that opportunity.

Transform the self-understanding of the association community so that SR becomes an accepted – and obligatory – part of each organization's core mission.

Model a process by which associations and their industry partners can galvanize their own staff and membership to become agents of world benefit in ways that are energizing and appropriate to each organization.

Provide a structure through which associations and their partners that decide to work on similar or identical issues can network together to augment the impact of their individual initiatives.

Lay the foundation for ASAE & the Center to provide supportive leadership, structured training, helpful resource materials and a collaborative infrastructure to encourage associations and their business partners to become agents of world benefit.

A Central Role for Technology

With members all over the world – and with the World Vision story fresh in mind – ASAE encouraged OvationNet to design the Summit to maximize the use of collaborative technologies, not simply to provide structured feedback to the participants gathering face-to-

face in Washington, D.C., but to engage members in the Summit process from wherever they might be.

Global Reach of the Summit

Seventy ASAE members, senior staff and ‘industry partners’ (vendors who market directly to the association sector) were invited to participate in a two-day design session in October 2007. The following design decisions emerged from that meeting:

- (1) ASAE would convene up to 500 stakeholders for a face-to-face Summit in Washington, D.C.
- (2) Other associations and affiliates would be invited to host face-to-face gatherings in conjunction with the Summit in Connected Locations (CLs) throughout the United States and abroad.
- (3) Web-based collaborative technologies would be employed to enable any ASAE member who wished to participate in the Summit process to do so remotely.

The goal was to eliminate as many barriers to participation – location, time-zone and cost – as possible.

As of March 10, 2008, 17 CLs will be convening in real-time in the U.S. and additional CLs will be convening in Abu Dhabi, Brussels, Madrid, Melbourne, Shanghai and Singapore. CLs outside the U.S. will be offered the choice to work either in real-time or asynchronously (in delayed-time) in relation to the Washington location at the Gaylord Hotel.

The Technology Components

The technology components being brought together for this Summit are:

(1) Streaming Video

A one-way video stream will be broadcast from the Gaylord Hotel on the first day of the Summit and will include the welcoming comments from the senior executives of ASAE, David’s facilitation instructions throughout the day and a ‘Call of Our Times’ panel featuring economist Jeffrey Sachs and other thought leaders on sustainability and social responsibility.

(2) Streaming Audio

On Day One, a separate audio stream will be provided for virtual users with low bandwidth. Due to cost constraints, only an audio stream will be provided for the second and third days of the Summit.

(3) Conference Phone Bridge Line

Two-way communication among all the Connected Locations participating in real-time will be provided through a telephone bridge line. International sites will connect to the bridge line using Skype. Selected virtual participants will be invited to join the telephone bridge in order to summarize and share results from virtual attendees.

(4) Web-based Collaboration and Community Platform

An always-available web-based collaboration and community platform provided by iCohere will be used as the ‘glue’ to integrate the media and to serve as the home base for all Summit participants. Core features of the online environment include real-time chat, forums, announcements, private messaging, resource library, story

gathering tool, best practice database and social/professional profiles.

(5) Digital Camera

Connected Locations will upload digital photographs of their sites. These will be projected at the Gaylord Hotel and at each CL to provide a visual representation of the global reach of the Summit.

Technical Requirements

For virtual participants, the technical requirements include nothing more than internet access and a current version of Internet Explorer, Firefox or Safari web browsers.

Connected Locations require a more complicated setup as they will need an audio switcher in order to switch between three separate audio channels: microphones at their own location, audio originating from the internet and audio originating from and going into the phone bridge.

Online Environment Design

Over the course of a year, the collaborative workspace will morph into five different configurations to support the unfolding of the Social Responsibility initiative:

- (1) Design Team communication environment in which information about AI and SR was posted prior to the design team meeting.
- (2) Pre-Summit communication environment in which all participants – from all the face-to-face and virtual locations – will engage for the three weeks prior to the Summit in a series of AI-based discussions. They will introduce themselves, begin to network and share their organizations' best practices regarding sustainability and social responsibility.
- (3) Summit platform that will provide an always-available communication platform connecting participants from all venues and serving as an archive for the knowledge generated in the Summit experience.
- (4) Post-Summit set of project workspaces available to the action teams that emerge from the Summit.
- (5) Spotlight on Association Innovation online conference, a follow-up event five months after the Summit, the purpose of which will be to provide greater visibility to success stories from the Summit action teams, identify synergies that might bolster the accomplishments of different projects and provide ASAE with a venue for continuing to provide guidance and inspiration for the growth of social responsibility initiatives across the association community.

With the goal of enabling participants to engage in a series of different and compelling online activities with only a single learning-curve, we decided to use a software platform that can be reconfigured to serve each of these many purposes. An alternate design might have used a wiki as a base platform with forums, audio, video and other technologies layered on an as-needed basis. The collaborative technology space is expanding rapidly and there are different viewpoints about the value of using a single platform for greater coherence versus using a variety of technologies for greater adaptability.

Summit Process for Real-Time Participants

The Summit process will follow the 4-D design and be facilitated by David Cooperrider via video stream on the first day and audio stream on subsequent days. The following table shows how each group will engage in the first Discovery exercise:

Gaylord Hotel	Connected Locations	Virtual Participants
Paired interviews	Paired interviews	Paired interviews, having been paired up in advance based on their preferred mode of communication: phone, Skype or text chat
Roundtable	Roundtable	Four pairs join as a virtual roundtable
Plenary Dialogues – 5 tables report	Plenary Dialogues – 1 table each from 5 CLs report using bridge line	Spokespersons from virtual roundtables report using bridge line

Figure 1: Summit Process in the first Discovery Exercise

With David providing coordination and a facilitator at each Connected Location working from a CL Workbook, the 4-D cycle will unfold at all locations with the added inspiration provided by projection into the room of photos from CLs and text from virtual participants. From a design standpoint, the challenge is two-fold: to engage virtual participants in an online counterpart of the 4-D cycle and to find efficient ways to integrate the results of online processes into the process at the Gaylord and the Connected Locations. We are refining strategies we used with World Vision and will be convening a group of experienced AI facilitators and consultants who have volunteered to help co-create these processes with us.

Summit Process for Delayed-Time Participants

Though the sites in the Middle East, Asia and Australia may choose to quite literally ‘rise to the occasion’ in the middle of their night to join the real-time Summit, provision has been made for them – and for European CLs – to participate in a ‘delayed-time’ mode.

Facilitators at these sites will draw on video and audio archives from the Gaylord session to engage their attendees in the same AI processes as the real-time locations. Results from these processes will be summarized and posted using the specially designed story gathering tool and report-out form.

A team will be working at the Gaylord beginning at 4 AM Eastern Time to review and synthesize these stories and data. The results will be shared with the real-time Connected Locations in that morning’s session as part of the daily ‘Global Roll-call: Vision and Voices from Around the World.’

Activities for virtual participants working asynchronously include an ‘Open Agenda’

with suggestions for how to engage in the process using the archived video and/or audio resources and how to participate in the forums. Instructions will also be provided on using the system's QuickMeeting instant messaging feature to enable participants to conduct ad hoc paired interviews and form ad hoc roundtable groups. As the Summit proceeds into the Design and Destiny phases, delayed-time participants will be able to join and actively engage in Action Team workspaces along with others from Connected Locations anywhere in the world.

Lessons Learned to Date and Current Uncertainties

New lessons, new puzzles and many uncertainties abound in this project! We are learning about partnering with an organization that has influence but little leverage with those whom it wants to engage in a global process; we're experimenting with the logistics for connecting almost two dozen gatherings into a single distributed Summit; and we're stretching our technological know-how and tools to explore the extent to which AI processes can be experienced meaningfully in an online environment.

Here are some of the key technology-related questions which we're addressing:

- (1) Can we keep the technology requirements simple enough so that those who are not particularly tech-savvy can enjoy the experience?
- (2) Have we anticipated the success factors required to work across time-zones, countries and cultures? (Unfortunately, we set the Summit date based on ASAE's general schedule and the facilitators' availability, and only later realized that in Europe, May 1 is a holiday. At a deeper level, some of our Connected Locations are in cultures where 'collaboration' has not emerged as a value, much less as a process, and it's not clear how they will respond to AI.)
- (3) Will we be able to streamline an approach to data synthesis to enable us to process the inputs from delayed-time locations in a meaningful enough manner to present at the Gaylord and to the real-time CLs just a few hours later?
- (4) To what extent can we provide virtual participants with the same kind of energizing and productive experience that AI provides when people gather together face-to-face?

We know that to join the emergent future one must accept the anxiety of uncertainty. We also know that the future of AI is a shared future that is unfolding at the convergence of two megatrends: the transformation of human consciousness guided by appreciative and positive energies, and the transformation of modes of human communication made possible by new technologies. Bringing these together, as we are doing in this Global Summit on Social Responsibility, offers a truly exciting opportunity both to witness the birth of what might well become the largest social responsibility summit ever held and to break new ground with the AI Summit method.