

# Appreciative Inquiry in Action

## AIFT Certification Report

### **AIFT Certification Report Submitted By:**

Lynora Bowen, MBA, PHR

Principal Consultant at Lynora Bowen Consulting Services



### **❖ Please include the AIFT dates and location that you received your training.**

I completed AIFT with an amazing group of people the week of April 13-16, 2015, in Las Vegas, NV.

### **❖ Brief description of the organization, group or community you worked with.**

I am working with the Board of the Northeast Florida Chapter of the Society of Emotional Intelligence (SoEI). It is a nonprofit professional association in the process of forming a local chapter of the national society in the community where I reside.

### **❖ List the names and/or category of stakeholders you included in the Core Group, the cross-section of people that helped you identify the positive topic and modify the Interview Guide.**

After a 36 year career working in a Fortune 100 company, I retired as a Change Management leader in October, 2014. As part of my journey to create this new chapter of my life, I became aware that a group of professionals was forming a Chapter of the Society of Emotional Intelligence (SoEI) in the Jacksonville, Florida area. Given my career background and previous work, my interest was sparked! I was attracted to connect to this group, to see what they were doing, focusing on, becoming. I found out that they had sponsored 2 meetings with speakers and had another meeting coming up. I signed up for the 3rd meeting, held in March 2015. It was very interesting to me. I was intrigued to continue connecting with the group. At the end of the meeting, I mentioned to the Chapter's Chair (Kelly Mannel) that I was attending AIFT in April. She was so excited and asked if I'd be a future speaker. I agreed.

I attended the 4th meeting, held the week after I returned from completing my AIFT. In networking, I heard that Kelly was forming a Board for the group to work on its future. I approached Kelly with an offer to facilitate the emerging Board in an Appreciative Inquiry (AI) as a tool for creating the future of the group. I shared that I needed to lead an AI to complete my certification. She was thrilled! The need she had to work on the future of the Chapter and the need I had for completing my certification came together in the perfect time for both! Kelly was meeting with 2 other members (Mary and Caroline) to work on the Chapter's website. She discussed my offer with them when they met. Mary contacted me and asked that I prepare a proposal to share with the 3 of them so they better understood what I was offering. I prepared a draft of the 1/2 day process, included AI background materials, and shared it with them. I proposed the AI topic be "Creating the Northeast Chapter of the Society of Emotional Intelligence Future". I asked for input from the 3 of them on the topic; they agreed with it. I got the "green light" to proceed.

At this stage of the Chapter's development, I see that the "AI Core Group" is the Board. It began with Kelly as the Chair/ leader of the group. When I made the offer to work with the Board, she was already in the process of recruiting people to serve. Kelly has a huge network that she's formed over the years and has a lot of experience in forming local professional associations, such as SHRM and ATD. She has a personal passion and a "calling" for networking and Emotional Intelligence. As Kelly and I talked by phone on who should be part of the Board/Core Team and things to consider for the Board's needs, she added others to join us. The Board is now 13 people, 12 of which were able to attend the AI Summit. All have a passion for Emotional Intelligence and making an impact in the community. Many are professional coaches, consultants, HR professionals, change leaders and trainers. Interestingly, a physician has joined the Board and is working with a goal of educating more physicians in Emotional Intelligence; she is the Treasurer. I am also a member of the Board; my role is Appreciative Inquiry Facilitator, a creative role for a Board of this type!

❖ **What was the positive topic that the Core Group identified for the inquiry? What method did you use to help them identify the topic?**

Identifying the topic for the Inquiry was an interesting challenge. The first meeting of the whole Board was the AI Summit, which took place on the afternoon of June 4, 2015 at the Epping Forest Yacht Club in Jacksonville, Florida. Many of the Board members did not know each other prior to then. There was no "one place" to go to develop the AI topic. I became a detective, searching out clues. I listened to the members at the speakers meetings I attended, inquired about the goals/vision of the Chapter Chair on 2 hour-long phone calls and found/analyzed the Vision & Mission of the National Society and the "welcome" on the newly formed Chapter website.

I also got amazing input from the AIFT Friday Coaching call on May 29. Prior to the call, I had proposed the AI Topic be "Creating the Northeast Chapter of the Society of Emotional Intelligence (EI) Future". Those on the call suggested that the group was striving to learn new skills in mastering EI, which aligned very well with the National Vision & Mission and the local chapter's website. This input inspired me to review the materials from AIFT Manual, Day 2, on Definition". And then I found it... right there in the middle of page 12....a topic that aligned with what I was hearing and seeing from the group!! LEGENDARY LEARNING COMMUNITIES! It felt so attracting and exciting!

I got another incredible gift from that Coaching call! Will, a fellow classmate in my AIFT, offered to work with me to develop the Modified Interview Guide. We had a phone call in which I shared the new, improved AI Topic with him and emailed him my draft of the Interview Guide and my Process Flow. I told him I was most concerned about the limited time I had to work with the group. He reviewed it over the weekend and we spoke again in a FaceTime call on Monday, June 1, 2015. It gave both of us time to reflect. During that time, I saw a post on LinkedIn that Corrin, another of our classmates, had asked about her interviews. Melissa responded to her question. One thing she suggested, given that Corrin only had 2.5 hours to work with her group, was to skip the section on "teaching AI". I thought, "That's it!" I can get another 15 -20 minutes to use for the interviews, images, etc., by taking out the teaching

portion. Instead, I sent all the participants an email with the 10 min. AI Overview by Jackie Kelm. That way, those who needed to learn more about AI could do so before the session.... and those who did not have time to view the video would still be able to effectively engage in the process!

Will and I discussed updates to the Interview Guide and the removal of the "teaching AI" part of the process. I remembered that in Day 1 of AIFT, we were asked to "just experience" an AI. We had been given materials in pre-mailers to learn about AI. After Will and I discussed it, I decided to model that with our Board's process. It worked very well. Some people told me they saw the video and really learned from it; others did not have time to see it. All were able to participate in the process very effectively.

Another idea that stemmed from the discussion that Will and I had was adding an "upfront piece" to help the participants become fully present in the process. The meeting began at 12:30 pm with a working lunch. I envisioned people rushing in from other places, out of breath. We came up with the concept of adding a moment to "just breathe". I suggested a question I had used in the past to ask everyone "What do you have to let go of to be fully present in our work today?" The idea was that people could have a topic to discuss while eating lunch, get to know each other better and become present in the session. It was an amazing idea that got even better! On June 3, the day before the AI Summit, I had the opportunity to attend a webinar by David Cooperrider. He made a statement that reached out and grabbed me... "Everyone bringing their inspired best every day!" So I upgraded the question *from* "What do you have to let go of to be fully present in our work today?" *to* "What do you need to do to bring your inspired best to our session?" It was more appreciative; I felt the energy rise in the room as people processed the question at their tables. It truly brought to life the power of a beautiful question!

On a personal note, I am so appreciative of Will's offer to help me with the Interview Guide. It became so much more! He coached me, checked in with me the night before the session to see how I felt and encourage me, and called me after the session to debrief on how it went, hear what I learned and coach me to "write it down" before I forgot the details. I am inspired by his coaching and see how I can be a better coach! Amazing!!

❖ **Attach or include the modified interview guide you used**

**"Legendary Learning Communities" - Society Of Emotional Intelligence of NE Florida**

Instructions:

Using the questions below, Person A interviews Person B for 15 minutes, taking brief notes. Then Person B interviews Person A for 15 minutes, taking brief notes. After both people have been interviewed, complete the Summary Sheet for the interview you conducted.

*(6 minutes)*

1. Recall a time when you participated in a **legendary learning community** - a time when learning was inspired, energizing, challenging and exciting; where you and others seemed to be highly engaged and learning rapidly.

Tell me that story.

- What made it exceptional?
- Who was involved?
- What did others do to support the learning?
- What was your role?

*(7 minutes)*

2. Let's talk for a moment about some things you **value** deeply, specifically the things you value about yourself.

- A. Without being humble, what do you **value most about yourself** - as a person and as a learner?
- B. What do you **value most about creating a learning community** like this one?

*(2 minutes)*

3. What **Three Wishes** would you make to heighten the vitality and health of this SOEI Chapter?

❖ **What method of interviews did people use to inquire into exceptionally positive moments?**

We used paired interviews, following the Modified Interview Guide, to inquire into stories of exceptionally positive moments of being in LEGENDARY LEARNING COMMUNITIES. Following the paired interviews, each person shared highlights of their partner's interviews with the entire Board. Everyone got to hear each other's stories.

❖ **Attach or include a list of the life-giving forces (what they MOST wanted to create MORE of) that the group identified in the stories they shared.**

Themes, or Life-Giving Forces, identified by the Board from the stories are:

- Impact on Community
- Happiness , leading to reaching our potential & beyond
- "Barbra Streisand" - People who Need People. Magic happens when we are all

- together. "Being"
- Passion
- We don't know what we don't know.....Embrace Ignorance
- Learning Experience and tools ... "Way Power"
- Show what it looks like
- Organic
- Everybody is welcome!

❖ **Attach or include the Provocative Proposition(s) the group or organization created from the life-giving forces**

Two subgroups were formed. Each subgroup developed a collage on poster board to create a visual image of their preferred future that fosters our **Legendary Learning Community**. They then shared their image with the other group.

The next step was for each subgroup to create a word image on a poster board of their preferred future that fosters a **Legendary Learning Community**.

The first group came up with :

Individual inspiration to establish BOLD connections with confidence & trust to achieve our ideal potential and beyond....GET STUFF DONE TOGETHER

The second group colorfully wrote a number of words on the poster board.... words such as boldness, happy, joy, emotionally connected, just "be", be "legendary learners", etc.

I challenged them to develop a Provocative Proposition from the words. The developed a second poster board, with the metaphor of a big light. Words included Vibrant, Attractive, Strong, Powerful, Living, Transformation and Revelation. They also shared that their colorful words are a "Wordle".... a word picture that can be generated at "Wordle.net".

Following the meeting, the Chapter Chair, Kelly, told me she saw the Provocative Proposition for her was to "Be a Legendary Learning Community".

❖ **Attach or include the Strategic Intentions the group or organization designed to realize the Provocative Propositions they created**

The key Strategic Intentions of the group was to continue working to develop our local SoEI Chapter. Specific Intentions were developed by forming a standing group and asking everyone to:

- State a Simple Commitment or Make an Offer or Articulate a Request.

The group was so energized that the process just kept going.... people shared, then built upon what others shared.

Some examples of what people shared includes:

- Paul, intends to become the Chapter Administrator. He requested that everyone get together in a meeting in the next few weeks to develop more tactical details related to the Administration of the Chapter. All agreed.
- Caroline, the Chapter Social Media Chair, intends to continue to develop the website (her first!). She asked everyone to send her a photo and a “bio” to post on the website. All agreed.
- Kelly, the Chapter Chair, shared her intention to continue to work with and network with other Chapter Chairs nationally to help them form and to learn from them how to help our Chapter as well.
- Kay shared that she had volunteered to be the Chapter Treasurer. Her intention is to remove some of the administrative burden from Kelly, the Chapter Chair so she can focus on working with other Chapter Chairs nationally.
- Pat and Isabel committed to continue as the Co-Program Chairs, lining up speakers for future Chapter meetings.
- Doug offered to continue learning new tools and sharing them with the group.
- John shared his intention to become the Chapter Membership Chair. He requested that we share our Chapter’s work with others in our individual networks and invite them to join us.
- I offered to continue as the AI Facilitator Chair for the group.

Many, many other offers and requests were made... so many that I could not remember them all! It was so exciting to experience the energy, passion and enthusiasm that came from the AI process!

❖ **Impact or Results: What attitude, process or structural changes have people made as they move toward realizing their Provocative Propositions? What progress have people made toward their Strategic Intentions? What stories of success can you share?**

Some impact and results:

- During the AI, Karen shared that she had just received a copy of the book she had just written and published. She was able to share her great news with the others on the Board and celebrate her success!
- Following the AI, a smaller group of 6 people (including myself) reconvened downstairs at the bar. We continued our inquiry for another 3 hours! So many stories were shared! We learned more about each other’s careers, our family backgrounds, our dreams and aspirations and so much more! It was incredible! All the sharing is serving to help us connect together... to build trust... to build a basis for our work on the Board. I felt like we were living the words from the "Wordle"...boldness, happy, joy, emotionally connected, just "be", and be "legendary learners".

- Three days after the AI Summit, Caroline has already sent an email to request information from the Board members for their photo and bio to add to the website. She is clearly acting upon her intention and requests.
- One day after the AI Summit, Paul is proposing times/ dates to reconvene the group meet again to work on the Chapter Administration.

❖ **What will you do to ensure that people continue to move toward realizing the Provocative Propositions? How will you help them gather stories of success? How will you help them celebrate? How will you, as the Ai Facilitator, support their ongoing success?**

To support the on-going success of the Chapter, I am going to become a member of the Board as the AI Facilitation Chair. I will stay closely connected to the Board so I can hear stories, lift them up, celebrate successes and continue to create our future using our AI tools, processes and questions. As a first step, I am planning to attend Paul's meeting coming up in the next 2 weeks. I will also continue to build my AI knowledge and skills through my own learning process.

❖ **What did you wish for in the inquiry? What did you learn from the inquiry about yourself and your facilitation? What was your 'personal best' experience related to facilitating the inquiry?**

My wishes for the Inquiry:

- To practice AI as a way to continue building my knowledge, expertise and skills through facilitating an Inquiry
- To support the Board in developing this Professional Association. I've been part of many such organizations in the past that were already formed and established. It's so exciting to me to build a local Chapter from the "ground up". I've also been interested in forming organizations, as well as transforming existing organizations. It feels like we are creating another "Legendary Learning Community" to work with in my retirement! I'm looking for that kind of group to be part of.
- To positively impact my community, using my unique skills, experiences and strengths.
- To connect and work with people who have similar interests and passions.
- To create an experience for the Board that engaged them and excited them

I learned a lot about myself and my facilitation. I learned that I am indeed a life-long learner, continuing to sign up for webinars, reading, attending speaker sessions, etc. I learned that I really do love facilitating groups and helping them define and achieve their shared dreams. I learned that I have great coaching skills that others see very quickly upon meeting me. I knew where I stood in my strengths and skills in my former corporation and was wondering how that "stacked up" in the outside world. I gained confidence in working with a group of "strangers" in addition to those I know well from years of working in the same corporation. I got such wonderful feedback notes following the session! I have a much better sense of where I stand in the larger community with my skills, knowledge and strengths. I learned how much I love the challenge of continuing to "hone and refine" a process right up to the point

of action...a form of improvisation. I love connecting with a group and adapting to what they need in the moment. I loved facilitating the AI Summit with no computers and no PowerPoints! To sum it up, I felt very alive!

My "personal best experience" related to facilitating the inquiry was feeling that I have found something I have been looking for in my new life... I'm finding my place in the larger world. When I retired, I did not plan to "work" again. I had an amazing career and did everything I dreamed of and so much more! As part of my transition process, I had a coach who strongly encouraged me to include some kind of "work" in my new life. I've been searching for what that might look like. I dreamed of positively impacting the community using my unique blend of skills, knowledge and strengths. By saying "YES! to the mess", I think I found the door to my future "work"...to something I can uniquely do and "be". I said YES to the career transition coaching; I said YES to doing a resume: I said YES to my resume coach's suggestion to check out this group (SoEI of NE FL Chapter); I said YES to attending AIFT with my dear friend and colleague Ang; I said YES by offering to use an AI Summit to support this Board in forming their future; I said YES to Will's offer to collaborate with me; I said YES to attending some of the AIFT Friday Coaching calls and YES to the suggestions offered. I said YES to 2 Board members looking for Coaching and Mentoring; I said YES to being on the Board in the unique role of AI Facilitator Chair; I said YES to follow up meetings.... and I am going to continue to say "YES ! to the Mess"!

My new favorite quote is "Each day comes bearing its own gifts... Untie the ribbons!" - Ruth Ann Schabacker

❖ **Have you received permission from your client to share their story?**

Yes, I did receive permission from all these AI Summit participants to tell their story. Company of Experts.net has permission to share the story with others. I asked them all for their permission in the Strategic Intent process (see #10).



## ATTACHMENTS

***Note... I did not use any PowerPoint presentations. I did not bring a computer to the AI Summit!***

### I. PROPOSAL FOR AI SUMMIT:

Email sent on May 8, 2015, to the Chapter Chair and 2 other Board members working on the Chapter website

Subject: Appreciative Inquiry for the NE Florida Chapter of the Society of Emotional Intelligence

Hello everyone!

I am a new member of the Society of Emotional Intelligence and have been attending the local NE Florida Chapter meetings.

I'm very interested in the organization and all the positive impact we will have on the surrounding community!

As you know from Kelly, I recently attended an Appreciative Inquiry Facilitator Workshop. As part of that workshop, I need to lead a practicum to complete my Facilitator Certification. I volunteered to work with the Board for the NE Florida Chapter of the Society of Emotional Intelligence in using Appreciative Inquiry to help us create a shared future. I think it can be a real "win-win"! All of you will be able to experience Appreciative Inquiry, I will be able to complete my Certification and the NE Florida Chapter will continue to grow in a positive way.

I've been asked to send you all some information on Appreciative Inquiry and a possible outline of the proposed process for this work....see below for details.

Please note that there is a lot of flexibility in our process and approach....we can adapt to meet the needs of the Board.

Knowing how difficult it is to align people's schedules, I think we can try to complete this Inquiry one 4 hour session. If we get so engaged in the process that we need to add another session, we can agree to do that with the group.

Mary and I discussed finding a few dates in June that we can all meet to run the process. I'm pretty open as to dates/ times.

Logistics...

- The AI process is best done with an even number of people. Mary suggested that there might be 8 people who are on the board and/or could be recruited to work with us.
- A conference room that will hold 8-10 people.
- 2 Flip charts/ markers

I'd love to hear your upgrades, comments, etc. Feel free to email me and/or call me. I'm very excited to do this work with you!

Thanks... Lynora

Details:

***So... What is Appreciative Inquiry anyway?***

Appreciative Inquiry is a collaborative, strengths-based approach to personal and organizational development that is proving to be highly effective in thousand of organizations and communities in hundreds of countries around the world. It is a way of bringing about change that shares leadership and learning, fully engaging everyone in the organization.

*Proposed Appreciative Inquiry - Society of Emotional Intelligence Board Workshop Outline*  
(Please note... I've used times assuming a session from Noon to 4 PM)

Noon - Introduction to the session

– Introduction, purpose, agenda

12:15 - Introduction to key concepts of Appreciative Inquiry

A brief overview of AI key concepts...the 4 or 5 D's

12:30 pm - Definition: Choose the positive topic of the focus of Inquiry -

Discussion: Discuss and agree on what everyone agrees is an important - even strategic - opportunity for this Board.

A proposed topic is "Creating the Future of the NE Florida Chapter of the Society of Emotional Intelligence"

1:00 pm - Discovery – Part 1: Inquire into exceptionally positive moments

Conduct paired interviews using an adapted generic interview guide to share our stories.  
(Please note: I will supply the interview guide and summary sheets.)

1:45 pm - Discovery – Part 2: Sharing our stories and identifying life-giving forces

Share highlights from the interview stories with the rest of the Board.

Brainstorm themes from the stories.

Discuss and agree on 3-5 life-giving forces...

Agree on one life-giving force....

*What people MOST want to create MORE of in our chapter*

**2:15 pm - Dream - Part 1 - Create a visual shared image of a preferred future**

In 2 small groups, create a visual image (metaphor) illustrating the life-giving force ...  
skits, collages, songs, drawings, etc.

**2:30 pm - Break / Sharing Visual Images**

**2:45 pm - Dream - Part 2 - Create a word image of a preferred future**

Based on the metaphor, each small group creates a word image... (such as, a Provocative Proposition\*, a Possibility Statement, or Vision )

*\*A Provocative Proposition is bold, affirmative, grounded in what is, provokes action, present tense, desired*

**3:00 pm - Sharing Word Images**

Discuss: How can we take the strengths of both word images and create one for the group?

**3:15 - 4:00 pm Design - Destiny / Delivery -Innovate and improvise ways to create that future**

### **3:15 pm - Design- Part 1- Create ideas**

In pairs, discuss ideas for how to make the preferred future happen

### **3:30 pm - Design - Part 2 - Share Design Highlights with the larger group**

"Popcorn" ideas; build on other ideas

### **3:50 pm Delivery & Destiny - Living Into the Future**

Take a minute as individuals to:

- State a simple commitment
- Make an offer
- Articulate a request

Speak the commitment into the room!

Any other next steps?

### **4:00 pm - Close and Thank you!**

#### **Resources:**

Here are a few resources that might be helpful in understanding more about Appreciative Inquiry!

Mohr, B., & Watkins, J. (2002). The essentials of appreciative inquiry: A roadmap for creating positive futures. Waltham, Mass.: Pegasus Communications.

(Note...I attached the article)

*The Stories of Positive Change in the Community College: Appreciative Inquiry in Action, Chapter One*

by Nancy E. Stetson

It is a very nice overview of AI.

(Note...I attached the article)

The Center for Appreciative Inquiry website: [www.CenterForAppreciativeInquiry.net](http://www.CenterForAppreciativeInquiry.net)

## **II. PRE MAILERS TO PARTICIPANTS:**

- A. Email - Invitation from the Chapter Chair to the Participants  
May 14, 2015  
Subject: Yippee, You Are Invited!

Dear Emotionally Intelligent Friends

We are off to a running start as a new chapter and are growing. We have many new members, people calling wondering about the next meeting and lots of community leadership waiting for our influence. Meanwhile, good things beget other good things!

Lynora Bowen is in the process of working through her Appreciative Inquiry certification and as we all know, practice makes perfect. I have accepted her proposal to conduct one for the leadership of our newly formed chapter.

I will ask Lynora to communicate directly to us as I hand off this process to her entirely. Meanwhile, I have included the spreadsheet of our contact information along with a general agenda. Lynora will likely enhance this in a a very big way. I want to thank her In advance for her leadership and talent in this area. I know you will all enjoy her process as much as I have already.

We have a room booked at Epping Forest Yacht Club, please come and have lunch, settle in and let us pick your intelligent brains for a few hours. Afterwards, you are welcome to stay, take a walk on the property and join me for a glass of wine.

Please rsvp to Lynora and if you think there needs to be anyone else involved in the process, please let her know and bring them along!

Thank you all in advance and I look forward to our time together!  
Kelly

- B. Email to All Invited Participants  
May 15, 2015  
Subject: RE: Yippie, You Are Invited!

Happy Friday everyone!! I hope all of you had a wonderful week!

As Kelly said in her email, I am working on completing my Appreciative Inquiry (AI) Facilitatory Certification. I had the privilege of attending a 4 day workshop from The Center for Appreciative Inquiry in April of this year. I learned so much! I am so excited to be able to work with this group to practice what I learned. I think this can be a Win/Win for all of us! We can further our development of the NE Florida Chapter of SOEI, we can experience the AI process together and I can complete my certification!

Just a little background...

### ***So... What is Appreciative Inquiry anyway?***

Appreciative Inquiry is a collaborative, strengths-based approach to personal and organizational development that is proving to be highly effective in thousand of organizations and communities in hundreds of countries around the world. It is a way of bringing about change that shares leadership and learning, fully engaging everyone in the organization.

There are generic processes that are used in Appreciative Inquiry, which some practitioners call the 4 or 5 **D's**. In this workshop, we work through these processes as a group, learning together and fully engaging everyone!

The 5 generic processes usually include:

1. **Definition** - Choosing the positive topic as the focus of the inquiry. I am proposing as our positive topic

.... "Creating the Future of the NE Florida Chapter of the Society of Emotional Intelligence"

*(Please note... I am very open to modifying this topic! Feel free to share your thoughts/ upgrades/ ideas!)*

2. **Discovery** - Inquiring into exceptionally positive moments and sharing the stories and identifying life-giving forces

3. **Dream** - Creating shared images of a referred future

4. **Design and Delivery** - Innovating and improving ways to create that future

It will be a fun-filled, fast-paced process!

**Resources:**

If you'd like to learn more about AI prior to experiencing it in our session, here are a few articles that give a very good overview of AI.

Mohr, B., & Watkins, J. (2002). The essentials of appreciative inquiry: A roadmap for creating positive futures. Waltham, Mass.: Pegasus Communications.

(Note...I attached the article)

*The Stories of Positive Change in the Community College: Appreciative Inquiry in Action, Chapter One*

by Nancy E. Stetson

It is a very nice overview of AI.

(Note...I attached the article)

The Center for Appreciative Inquiry website: [www.CenterForAppreciativeInquiry.net](http://www.CenterForAppreciativeInquiry.net)

***Feel free to contact me with questions, upgrades, comments, etc.***

***My email is (deleted)....***

***My phone is (deleted).... (Please note that the number on the Spreadsheet is transposed.)***

***Thanks so much! I'm so excited to work with you!***

***All the best...Lynora***

- C. Email to All Invited Participants  
May 29, 2015  
Subject: More on Appreciative Inquiry:

Hello, everyone! I hope you had a productive, joyous week!

I am looking forward to working with you on Thursday, using Appreciative Inquiry to build the future of our NE FL Chapter of the Society of Emotional Intelligence.

We have a very tight agenda, so I thought I would send out a link to a 10 minute video from Jackie Kelm as an overview of Appreciative Inquiry.

[www.youtube.com/watch?v=ZwGNZ63hj5k](http://www.youtube.com/watch?v=ZwGNZ63hj5k)

All the best, Lynora

### III. The Final Process Flow

After many revisions and upgrades, here is the Process Flow I used in the meeting. I've include notes in **RED**; I made in the session since I kept adapting it to make it better!

#### **Appreciative Inquiry - Society of Emotional Intelligence, NE Florida Chapter Board Workshop**

*June 4, 2015*

*12:30 - 4:00 PM*

**12:30 - Working Lunch & Introduction to the session - Kelly, Chapter Chair**

**I introduced myself as well, giving them an overview brief "BIO" of myself.**

**12:45 - Grounding - Getting "present" here and now**

Reminding myself to be in the present of NOW... focus on "Breathing " in myself and others

~~"What do you need to let go of to be fully present in our workshop today?"~~

**Changed to: "What do you need to do to bring your inspired best to our session?"**

**It was a working lunch, so I invited them to discuss the question and review the handout of Tips for Conducting an Appreciative Interview. I did not think it would be a good idea to try and do paired interviews while they were eating lunch! Too much distraction. So I tried to figure out what work they could do to continue; I landed on sharing the Interview Tips.**

**12:50 pm - Engage in Appreciative Inquiry**

The positive topic of the focus of Inquiry is:

"Legendary Learning Communities"

**12:50 pm - Discovery – Part 1: Inquire into exceptionally positive moments**



\* Set up pairs for interviews

**I asked them to pick someone they did not know as their interview partner. Many people on the Board had never met before this Summit!**

- Review: Handout - Tips for Conducting an Appreciative Interview

**Moved up in the process flow...**

- Give Handouts: Modified Interview Guide and Summary Sheet

**Actual time ~1:15 PM**

Conduct paired interviews using an adapted generic interview guide to share our stories.  
Allow 15-20 mins. for each person to be interviewed

**We had an odd number of people; Caroline requested me to be her partner, so I decided to participate in a paired interview. So glad I did! It enabled me to also share my story and dreams since I will be continuing as a member of this Board.**

**1:30 pm - 1:35 pm - As Individuals, Complete Summary Sheet handout**

**1:35 pm - Discovery – Part 2: Sharing our stories and identifying life-giving forces**

Participants - Share highlights from the interview stories with the rest of the Board.

As a group - Identify themes from the stories.

**I charted the group's responses on flip charts.**

Select the theme that has the most energy for the group to take into the Dream Phase....

*What people MOST want to create MORE of in our chapter*

**2:15 pm - Dream - Part 1 - Create a visual shared image of a preferred future**

**Actual time ~3:15 PM**

**I made a flip chart - "Create a visual image of a preferred future"**

**Prior to the meeting, I cut out many pictures from magazines to provide them images for the collages. I even had some local community magazines that provided pictures of local landmarks.**

(Include a Break ?) I moved the break up before the exercise. I used this time to clear the lunch items from the tables so we could do the images. (I requested help from the participants as well!) I put out supplies... poster boards, markers, pictures, pens, etc.

In 2 small groups, imagine our Chapter as a Legendary Learning Community. Create a visual image on poster board illustrating the theme ... collages, drawings, etc. - to represent your **preferred future** for the theme.

I also gave them the option to create songs, skits, etc. Both subgroups decided to do collages.

Share Visual Images with other subgroup

**2:45 pm - Dream - Part 2 - Create a word image of a preferred future**

I made a flip chart - "Create a word image of a preferred future - Provocative Proposition - *bold, +++, provokes action, present tense...desired*"

Based on the visual image, each small group, writes a **Provocative Proposition** (*bold, affirmative, grounded in what is, provokes action, present tense, desired*) for this image of your preferred future that fosters a Legendary Learning Community. Put on a flip chart or poster board.

**3:00 pm - Dream - Sharing Provocative Propositions**

Each group shares its Provocative Proposition.

Coalesce into one Provocative Proposition (if possible)

Due to the extremely limited time, and the intention to have them experience all the D's, we did not narrow it down to one PP.

**3:15 pm - Design - Create ideas/ Innovate ways to create the preferred future**

As a group, brainstorm ideas for how to make the preferred future happen.  
Chart ideas.

At 3:30 PM - I was reminded that we needed to leave the room by 4 PM, so I decided to skip the brainstorming ideas and move directly to the next part of the process: Delivery & Destiny. I was thinking that ideas for the future would emerge. They did!

### **3:30 pm Delivery & Destiny - Living Into the Future**

**Actual Time: 3:50 PM**

**I made a flip chart of these instructions:**

Take a minute as individuals to:

- State a simple commitment
- Make an offer
- Articulate a request

Form a circle - Standing - Speak the commitment into the room!

**When I asked them to stand and form a circle, someone said "is it time to sing Kum Bay Ya?"**

**"Yep, it is!"... Everyone laughed!**

Any other next steps?

**Everyone was so energized! They kept making commitments and requests. The Chapter Chair slipped out to ask the staff if we could continue in the room a while longer. We actually did not leave the room till 4:30 PM.**

**During this time, I asked the group for permission to share their story/ materials/ photos with Company of Experts.net. All agreed!**

**3:45 - 4:00 pm - Set Planning meetings for summer, fall schedules - Paul Stromberg, Chapter Administrator**

**During the circle, Paul requested that we all meet again soon to work on future plans for the Chapter's administration. All agreed.**

**4:00 pm - *If possible, adjourn to a Public area to continue to discuss the future on the Chapter's preferred Future***

**Actual Time: 4:30 PM**

**I gave participants a one-page handout of the 5 D's with 2 AI definitions.**

**A small group of 6 was able to continue to meet downstairs in the Bar. Over cocktails, we continued to share stories, get to know one another, share our thoughts on the Chapter's future, etc. I finally got to my car at 7 PM, 3 hours after the scheduled meeting ending time! So much energy and enthusiasm!**

#### IV. HANDOUTS (4)

1. **Tips For Conducting An Appreciative Interview, AIFT Training Manual, Tab 5, page 20**

2. **Modified Interview Guide, Adapted from the AIFT Training Manual, Tab 5, page 14**

Interview Guide - "Legendary Learning Communities" - Society Of Emotional Intelligence of NE Florida

Instructions:

Using the questions below, Person A interviews Person B for 15 minutes, taking brief notes.

Then Person B interviews Person A for 15 minutes, taking brief notes.

After both people have been interviewed, complete the Summary Sheet for the interview you conducted.

*(6 minutes)*

1. Recall a time when you participated in a **legendary learning community** - a time when learning was inspired, energizing, challenging and exciting; where you and others seemed to be highly engaged and learning rapidly.

Tell me that story.

- What made it exceptional?
- Who was involved?
- What did others do to support the learning?
- What was your role?

*(7 minutes)*

2. Let's talk for a moment about some things you **value** deeply, specifically the things you value about yourself.

A. Without being humble, what do you **value most about yourself** - as a person and as a learner?

B. What do you **value most about creating a learning community** like this one?

*(2 minutes)*

3. What **Three Wishes** would you make to heighten the vitality and health of this SOEI Chapter?

**3. Summary Sheet, AIFT Training Manual, Tab 5, page 15**

**4. Five Generic Processes of Appreciative Inquiry, Bernard J Mohr & Jane Magruder Watkins,  
The Essentials of Appreciative Inquiry:  
A Roadmap for Creating Positive Futures, P. 5**

**Included 2 AI Definitions - One from Company of Experts; Another from Diana Whitney**

## **V. Supply Box**

In preparation for the AI Summit, I prepared a box of supplies to have available in my facilitation.

I borrowed the Chapter Chair's flip chart easel and flip charts from a meeting she had prior to our AI Summit.

I included:

- Poster Boards
- Small stapler
- 3" x 3" Sticky Notes, assorted colors
- Roll of clear tape
- Roll of blue painter tape (if I needed to hang non-stick flip charts)
- Stick Pins
- 2 pairs of small, rounded tip scissors
- 1 box of Sanford Mr. Sketch scented chisel point markers (Staples, Amazon)
- Box of colored pens
- Box of ink pens, assorted colors
- Glue Sticks

Due to the small number in the group, I did not purchase name tags or colored dots. For a larger group, I would add them.

## VI. Photos



The Board of the Society of Emotional Intelligence, NorthEast Florida Chapter

June 4, 2015

Appreciative Inquiry Summit

From Left to Right...

Kelly, John, Isabel, Peggy, Caroline, Kay, Paul (back), Pat, Karen, Lynora (AI Facilitator), Connie, Doug

Unable to attend - Mary





Group 1 - Visual Image of our future

Some comments from the sharing...

At the bottom... pictures of Jacksonville skyline...our community

We are stretching


Moving up on the left... lots of diversity

Center... we need an "elevator speech"

Right side... connecting people; we are together

Top... reaching new heights; our Dreams!

Individual inspiration to  
establish **BOLD** connections  
with confidence. <sup>+ TRUST</sup> to  
achieve our ideal potential  
& beyond.

GET STUFF DONE  
TOGETHER 

Group 1 - Word Image of our future





## Group 2 - Visual Image of Our Future

Some comments from the sharing...

We are building toward World Peace

Center - we are calm and centered

Ben Franklin - we want to be diverse

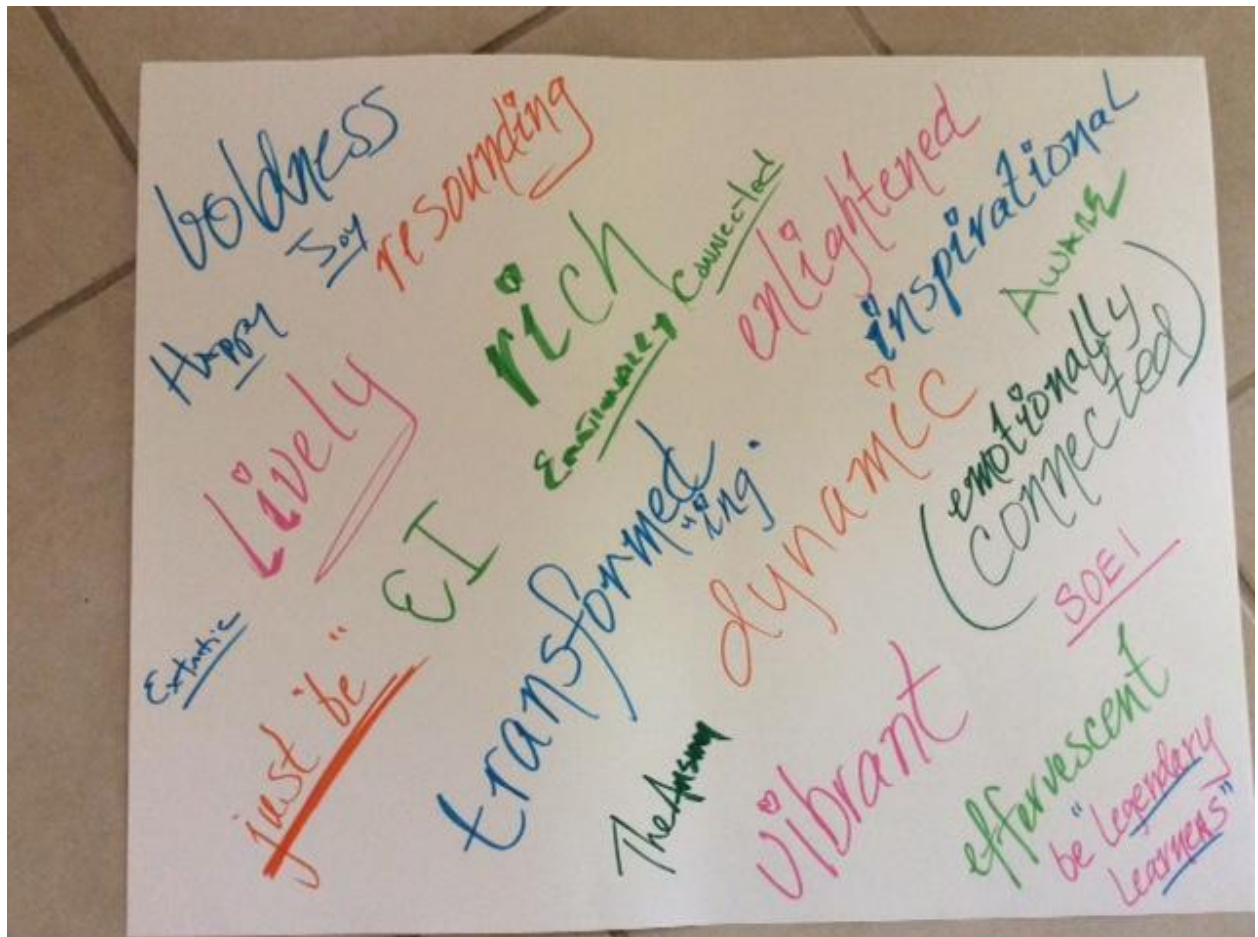
House - we dream of having a physical location to house our organization

We hold the keys in our hand

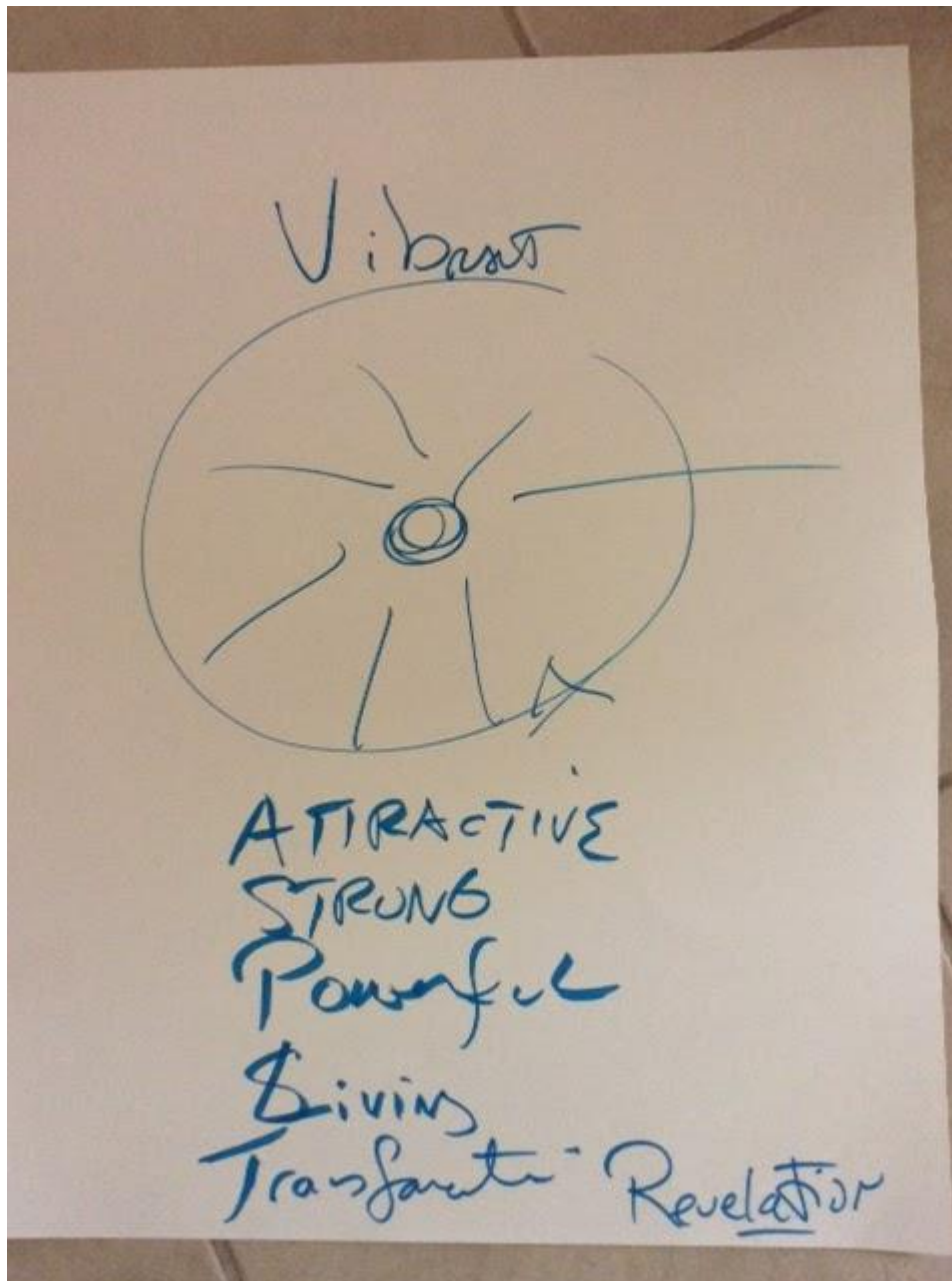
It's beyond seeing shades of grey... it's about all the colors

A rainbow!

Comfort - the dog in the woman's lap



Group 2 - Word Image of Our Future



Group 2 - A 2nd Word Image of Our Future

Some comments from the sharing...

We are a light... a powerful beacon...vibrant... like a magnet.



**We currently have openings on our Board for:**

- Treasure**
- Membership Chair**

**Consider become involved and help EI come to life!**

An email to our members - Kay volunteered to be the Treasurer; John volunteered to be the Member Chair!

We are off to a wonderful start!!