

PART 3: TACKLING MAJOR SOCIAL ISSUES

The topics covered broadly in the first two sections of this issue — relational context and emergence in the midst of chaos and complexity — underlay the dynamics of the two stories that comprise our third and final section. However, these two stories share a compelling focus on the use of AI in tackling major social issues. The stories share a similar focal issue — racism and inter-ethnic conflict — but set within two very different countries, continents, cultures, and organizational contexts. The stories also highlight two very different approaches to early engagement and how those choices and opportunities influenced the emergence of the AI process. Finally, these two cases offer provocative insights into the possibilities for AI in dealing with deeply contentious social issues in highly complex systems.

Progressive Definition within Complex Systems: Lessons from the YWCA

Colette Herrick, Sallie Lee, Cheri Torres and Wendy White

colette@insightshift.com, sallie@sharesun.net, cheri@mobileteamchallenge.com and wendybwhite@earthlink.net

The YWCA of the USA, a large, loosely woven national organization that is working on culture transformation, was the winner of the AI Consulting Destiny Prize. This project provides insight into a range of essential considerations for the application of AI for large-scale change and lessons for the Definition process. Areas of focus include the significance of organizational structure on change initiatives, the role of formal and informal leadership, and the progressive nature of the definition phase in the context of a system that has been undergoing explicit reinvention of culture and structure for over a decade.

The YWCA of the USA, a national organization with 2.6 million U.S. members in 294 local associations organized into nine regions, was the winner of the AI Consulting, LLC (AIC) Destiny Prize in June 2003. The Destiny Prize consisted of \$200,000 in pro bono consulting provided by an ad hoc team of AIC consultants who chose to contribute their time and expertise to a transformational change project in the non-profit sector. The full team of consultants was Stefan Fuegi, Eileen Conlon, Colette Herrick, Sallie Lee, Bernard Mohr, Cheri Torres and Wendy White.

In 1998, the YWCA of the USA had launched a major organizational change initiative. We were told it was prompted by declining membership, loss of leadership, distrust of the national organization, unfocused advocacy work in legislative channels, a blurred image/brand, and decline of funding. At the time of the award, the changes that were in process or had taken place included re-branding and relocating the national headquarters from New York to Washington, DC with accompanying reductions in national staff, restructuring to create more regional autonomy, and shifts from a top-down to a bottom-up organizational structure.

In the YWCA Destiny Prize application and subsequent initial conversations, the YWCA Cultural Transformation Committee (CTC)—the YWCA team that was leading the organizational change process—stated an interest in having the culture catch up with the organizational change initiatives in a way that would bring increased trust, collaborative capacity, and enhanced social change effectiveness in implementing the YWCA mission of *eliminating racism and empowering women*. The CTC leadership voiced their desire to leverage the proud and significant organizational strengths and history of the YWCA, the foremost being a “voice for women” and a “force for change” for over 150 years.

Definitional challenges around leadership support

Our Definitional challenges throughout the process involved creating support and alignment on what steps would have the greatest potential impact. We discovered that although the CTC fully supported AI applications, it was difficult and time-consuming to find sufficient leadership buy-in across this large, decentralized system with such a diversity of histories and perspectives. This was perhaps attributable to a variety of factors: (1) the YWCA had reorganized so that leadership decisions were purposefully made by representatives elected from the nine regions, rather than a single executive at the national office; (2) the National CEO position was in transition at the time of the Destiny Prize launch which reduced initial National Office involvement in communicating the purpose and benefits of the Destiny Prize and AI processes, and (3) the potential challenges of pro bono work (discussed later in this article).

At the beginning of the project, the Destiny Team: (1) presented AI overviews, (2) facilitated four different “Definition” meetings with various cross-sections of the leadership [including a meeting with the Board of Directors, called the National Coordinating Board, and a two-day retreat with 60 members of the leadership body], and (3) secured approval to go ahead with carefully agreed upon steps. However, as we learned over time, that approval came without the whole-hearted buy-in and support of key leadership sectors. Overall, about a third of our consultative time was spent on defining and redefining the process.

Selection and Progression of Initiatives

After more than six months of work on the **Definition** stage, the CTC and key regional and national leaders approved three major initiatives they felt would use the Destiny Prize time and YWCA resource allocations optimally in support of cultural transformation. The Destiny Prize Team concurred on the initiatives as follows:

- A 5-day AI foundations training for self-selected leaders of cultural transformation initiatives
- A strategic planning process for the national office
- A 3-day Summit on Eliminating Racism, which came to be titled *Igniting the Collective Power of the YWCA to Eliminate Racism: Moving the Conversation to the Next Level* (the “Summit”).

Within weeks, the Strategic planning piece disappeared from the agenda as YWCA National Office leadership decided to use another format for their planning. As the Destiny and CTC teams co-planned the 5-day training, we all realized that the stakes were high. If

the training did not pull in a large and influential group of representatives from across the country, the understanding and support for AI would be insufficient to go forward with the Summit or any other AI-based culture change initiatives. In addition, the YWCA asked us to focus the training on how individual areas and leaders could incorporate AI into their daily work, not just learn about how to run 5D planning processes. To that end, we rewrote the workbook to present the materials in Learning Module formats that would allow participants to bring AI into any and every area of their work life, as well as find small ways to use AI to set the context for cultural change.

The 5-day training attracted 30 key regional leaders and was the turning point for our work. Participants recognized what AI meant and how it could *support* culture transformation rather than *be* the culture transformation. Participants drafted a powerful charter for what they wanted cultural transformation to look like and how they would support each other in the process of creating and participating in it.

Success and Hurdles

Both the CTC and The Destiny Team were encouraged. We had generated new clarity and commitment and were ready to take on responsibility for: (1) planning the groundbreaking Summit on eliminating racism, (2) bringing 200+ YWCA participants to it, and (3) making it a rich, multi-faceted experience. It was planned to take place in Birmingham, Alabama because of the key role that the YWCA had played there during the Civil Rights movement.

In setting the tone and title of the Summit, we learned that the greatest outcome of it would be for participants to assist the YWCA and their communities in being able to envision a world beyond racism and take confident and meaningful action steps toward those visions.

As the team embarked on designing the nationwide Summit, we knew we would have to find multiple ways to engage the whole in the planning and definition process. Our greatest hurdles were:

- The YWCA's focus on racial justice resulted in questions about the validity of using a process such as AI to discuss such an emotionally charged and serious topic as racism
- The lack of diversity on the Destiny Prize Team and Summit Committee
- The large volunteer base, and
- The challenge of creating an incentive for people to spend their time and money to attend the Summit.

Divergent goals and differences in perspectives contributed to the difficulties throughout the ongoing definition process, and they showed up more clearly as we worked towards planning for the Summit.

This is not a unique challenge for AI practitioners. Those who are heavily invested in the problem-solving and/or confrontational approach to resolving issues are generally reticent to let go of naming and talking about the problems when they engage with others. This becomes especially visible when working on an emotionally charged issue like racism. As a result, at times we felt like we engaged in ways that were at cross-purposes with one another.

From Hurdles to Opportunities

We stayed committed and worked to turn our hurdles into opportunities. Our first step was

to diversify the YWCA Summit planning team to be more racially representative of the YWCA. The second was to design a way to engage YWCA members across the country in a mini-inquiry. Participants from the 5-day training facilitated inquiries at their regional meetings. This had many benefits. Internal YWCA leaders were given the opportunity to share the AI process and philosophy. Participants experienced the power of an AI dialogue, and we gained vital information for the planning committee to use as they designed the Summit. Registration forms were distributed after each meeting, and the inquiries became a vital marketing tool for the Summit.

As for the Summit content, once again, the need for clear Definition came up. The Destiny Prize consultants and the YWCA Summit planning team members engaged in deep conversations about what powerful interview questions would most support and advance the process. A significant learning from the Summit was that eliminating racism, a potentially volatile topic, requires both a strong container *and* a safety net to modulate the degree of heat that can be generated and to support resilience and presence for all involved. Despite the fact that there was indeed high volatility and challenge in the midst of creativity and connection at the Summit, this experience has sparked a range of powerful initiatives. Examples include:

- Racial justice staff training programs
- Diversification of key leadership positions
- Advocacy – commitment to put forth a bold national agenda of education and awareness
- Media campaigns
- Formation of a racial justice institute
- Leveraging technology to eliminate racism, i.e., recruitment, and
- Creation of new positions within local YWCA's devoted to studying and addressing racism in that community.

One idea that met with a lot of enthusiasm was a nationwide Hallmark program entitled, *The YWCA Declares W.A.R.: Women Against Racism— A War Worth Fighting*. We look forward to reporting in more depth on these initiatives in future articles.

Key Lessons Learned

The Summit completed the Destiny Team's promised work. We grew personally close to the CTC members and came to deeply love the organization. We learned lessons that will inform our work far into the future, with most of those lessons falling into the domain of Definition.

Key areas where we kept renegotiating the terms of the engagement included:

- **Understanding the role of AI in providing the approach not the answers:**

The YWCA was like many organizations in that it looked to the consultants to provide answers. The Destiny Team affirmed and reaffirmed that AI was not the answer but rather an approach to use to discover the organization's answers. The CTC came to fully embrace the idea of AI as an approach rather than the definition of their new culture, and they became very skilled at communicating that.

- **Understanding that AI is about more than the "positive":**

In an organizational culture committed to empowering those who have been

disempowered, there is suspicion of anything that sounds like it avoids talking about the “tough issues”. A profound lesson for all of us was the importance of shared understanding and finding ways to share information that can be heard.

- **Importance of Wholeheartedness:**

We learned much about “wholeheartedness” — the distinction between high levels of desire for change and whole-hearted commitment to the path and implications of change. This is similar to what many have referred to as “organizational readiness”. One measurement of wholeheartedness is financial investment. We are left wondering whether the *pro bono* nature of the work inadvertently facilitated the opportunity to not be wholehearted in some ways.

As a team, we collaborated for the first time on this project, and learned a great deal about our own levels of wholeheartedness. We gave more than we ever thought would be required. We embraced the people and mission of the YWCA. We loved it; stuck with it; and worked toward full “Definition” and alignment with the YWCA repeatedly throughout the project.

- **Leadership and on-going critical mass buy-in:**

There is no substitute for full, extensive leadership support for the process. Support cannot be delegated in such a large project. We learned that support spirals and we had to continually re-clarify commitments, aims and processes.

The YWCA will continue to focus on evolving the culture it needs in order to deliver the stellar dual mission of empowering women and eliminating racism. We are hearing that topics coming from the Summit are turning into projects at an unprecedented rate around the country. A new group of emerging leaders has asked to be trained later in the year. Our sense of the success of the Destiny Prize is reflected in a significant number of leaders across the YWCA who understand and appreciate what cultural transformation is and how AI can inform and facilitate the process.

As for how this work will ultimately impact the YWCA, stay tuned.

Advertisement



Using Strength-based Approaches to Personal and Organisational Change:
the Theory and Practice of Appreciative Inquiry

A workshop in 5 one-day sessions

Workshop Leaders: Anne Radford
Julian Rizzello
Dates: January - March 2007
Location: Central London

For more information contact Anne Radford at
editor@aipractitioner.com

WORKSHOP LEADERS



Anne Radford was one of the first people to work with Appreciative Inquiry in this country. She uses this, and other strength-based approaches to change, with businesses, in healthcare settings and communities. She coaches managers and consultants in their use of these approaches and is the editor of *Ai Practitioner*, the international online publication of AI best practice.



Julian Rizzello, a Chartered Psychologist, works at the National School of Government. He has created and delivered a range of programmes for public and private managers on strategic planning, leadership, change and crisis management. His competences include psychometric tests and Appreciative Inquiry.