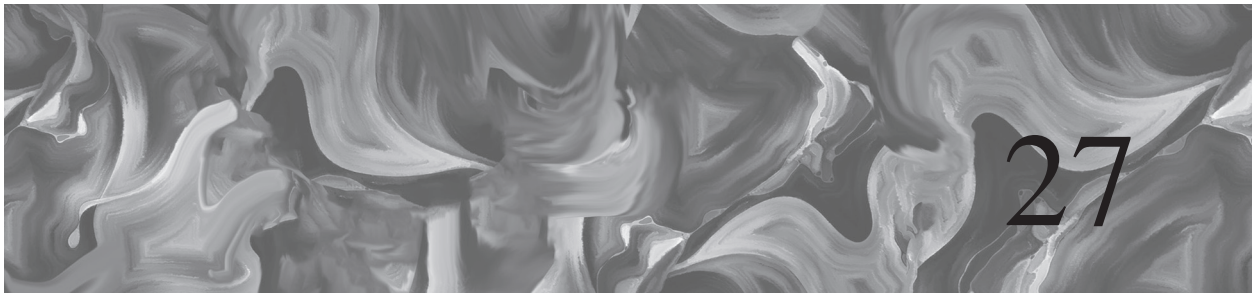

Large Scale Appreciative Inquiry: New Futures Through Shared Conversations

Amanda Trosten-Bloom and Barbara E. Lewis

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This chapter shows how to collaboratively engage large numbers of people of radically diverse backgrounds – including those whose voices are not often heard – in clarifying and constructing their future using Appreciative Inquiry (AI). AI is a profoundly inclusive, strength-based, future-forming approach to organizational and community change that is distinguished by its capacity to inspire hope, commitment, collaboration and innovative action.

The question of how to design and facilitate AI initiatives has been studied at depth for nearly three decades in writing, training programs and more.[1] Because of this, the following chapter focuses on *large scale* AI: specifically how large scale approaches are distinguished from their smaller scale counterparts; and how these approaches enable people to forge new futures through shared conversations. Recognizing that the identity of human systems resides in the stories people study, share and organize around, we explore how large scale AI offers a way forward for those who wish to engage dozens, hundreds or even thousands of people in creating and sustaining organizations and communities that work for all.

WHAT IS APPRECIATIVE INQUIRY?

Appreciative Inquiry has been described as 'the study of what gives life to human systems when they function at their best' (Whitney and Trosten-Bloom, 2010, p. 1). It is a relational approach to organization and community change that has evolved out of three traditions – image theory, grounded/action research, and social construction (Whitney and Trosten-Bloom, 2010, p. 49).

In *An Invitation to Social Construction,* Ken Gergen suggests that conversations and relationships are instruments of creation: 'As we speak together, listen to new voices, raise questions, ponder alternatives, and play at the edges of common sense, we cross the threshold

into new worlds of meaning. The future is ours – together – to create' (Gergen, 2009, p. 6). Indeed, as groups of people convene and converse, they inevitably construct *prevailing narratives*. Recognizing this, AI offers a structured, fully affirmative process that enables people to surface often-untold stories of success and construct new prevailing narratives. It helps people 'see things with new eyes [and] co-create new understanding' of what is good, right, and true (Camargo-Borges, 2019, p. 91). This in turn enables them to reinterpret – perhaps even reinvent – the way they see and understand the worlds that they inhabit.

The process behind AI is known as the 4-D Cycle: Discover, Dream, Design and Destiny (Cooperrider and Whitney, 2005, p. 16). This 4-D Cycle can drive anything from a brief conversation to a multi-year, multi-stakeholder engagement; but the specifics of its application vary according to the purpose, scale and scope of the initiative. Below, we provide an overview of each of the 4D cycle phases.

Discover – Appreciating and Valuing the Best of What Is

The purpose of Discovery is to 'search for, highlight, and illuminate those factors that give life' to human systems (organizations, communities, families, etc.) (Ludema et al., 2003, p. 10). Key activities include: selecting affirmative topics for inquiry; crafting questions; conducting interviews to gather both stories of success and images of what might be. People then make meaning of the data (using narrative analysis), and articulate what is known as the 'positive core' or 'root cause of success' of that which is being studied.

Dream – Envisioning What Might Be

Dream involves 'lift[ing] up the best of what has been and invit[ing] people to imagine it even better' (Whitney and Trosten-Bloom, 2010, p. 177). Here, whole brained/whole bodied activities stimulate capacity for creative, out-of-the-box thinking, giving rise to new possibilities and making original connections between past experiences and future opportunities. Key activities include reflecting with others on the desired future, creatively enacting shared visions, and then identifying key elements or opportunities to embrace going forward.

Design – Determining What Should Be

Design involves positive disruption: changing the way the things are done so that collective intentions are brought to life on an everyday, ordinary basis. Participants collaboratively recreate systems, structures and processes to leverage strengths and achieve their organizational ideals. Key activities include ideation, prototyping and crafting of principles (aka provocative propositions) that 'stretch the status quo, challenge common assumptions, and suggest real possibilities for change' (Ludema et al., 2003, p. 181).

Destiny – Innovating What Will Be

Sometimes referred to as Delivery, this phase involves organizing the people, tools and resources needed to give form to the chosen design. Here, along with action planning, metric-setting and building implementation strategies, participants develop 'plans and processes that encourage and nurture *ongoing improvised action* [our italic] by people across the system to ramp up a collective sense of destiny' (Cooperrider and Whitney, 2001, pp. 611–630 in McQuaid and Cooperrider, 2018, pp. 161–162).

The 4-D Cycle in Action

Like many approaches to transformation, AI and the 4-D Cycle are scalable. They have

been applied to everything from one-on-one conversations and small group gatherings, to large multi-day events, to months- or years-long system-wide interventions (Whitney and Trosten-Bloom, 2010, pp. 25–30). Regardless of the application, AI and the 4-D Cycle enable people to experience the kind of 'language shift that produces an attractive and empowering reality' (Ford, 1999, p. 4) – and that ultimately releases new ways of seeing, knowing and acting.

TAKING AI TO SCALE

From the beginning, AI practitioners understood that focusing on strengths, success and possibilities would enable people to discover what unites them and feel shared responsibility for action. They also acknowledged that giving voice to people 'on the margins' was a generative practice that paved the way to new realities. Putting these understandings into practice, they designed and adapted processes to engage more and more people of increasingly diverse backgrounds in positive, future-forming conversations.

Over time, three particular frameworks evolved for *taking AI to scale*. All of the three – the mass-mobilized inquiry, AI summit and whole system 4-D dialogue – can be adapted, scaled or refined based on an initiative's purpose, size, geographic area, and duration.

Mass-Mobilized Inquiry

One of the first (or perhaps the best-publicized) mass-mobilized inquiries was Imagine Chicago. As part of a broader community-based civic inquiry, founder Bliss Browne initiated a citywide conversation between youth and community leaders to gather stories and commitments related to the future of Chicago, Illinois (Browne, 1995). Later, Whitney and Trosten-Bloom named the approach, describing it as 'a waterfall-like process for engaging large numbers of people in face-to-face conversations' (Whitney and Trosten-Bloom, 2010, p. 36).

Mass-mobilized inquiries often begin by delivering interview guides, summary sheets and trainings (in person or online) to an unlimited number of volunteer interviewers. As interviewers conclude a conversation, they invite their partner to interview others. This creates an infinite number of 'ripples' from what may be an initially small number of interviews. This 'cascading' design enables a wide variety of participants from varying backgrounds to engage with the process and 'negotiate a common reality' (Gergen, 2009, p. 118).

Meaning is often made by a small, diverse group working on behalf of the whole, either periodically throughout the inquiry or upon completion of the project. Because members of this group are a microcosm of the whole, reflecting upon widely divergent stories and insights, they are equipped in unusual ways to make choices and coordinate action that takes into account multiple perspectives and realities.

Appreciative Inquiry Summit

As Imagine-like initiatives were unfolding, a second approach for taking AI to scale was born. First described as a way to 'bring Appreciative Inquiry, social construction theory and a philosophy of positive change to large scale interventions' (Cooperrider and Whitney, 2000, p. 13), the Appreciative Inquiry summit is:

> A method for accelerating change by involving a broad range of internal and external stakeholders in the change process. It is typically a single event or series of events that bring people together to (1) discover the organization's or community's core competencies and strengths; (2) envision opportunities for positive change; (3) design the desired changes into the organization's or community's systems, structures, strategies, and culture; and (4) implement and sustain the change and make it work. (Ludema et al., 2003, pp. 12–13)

AI summits bring large diverse groups of 50–1000 people into the same space for between 1 and 5 days. Working in small groups of 8 to 10 (each of which is a microcosm of the whole), participants self-manage through a series of tightly scripted conversations and activities. As small groups report out and present to the full group of participants, individual identity gives way to relational identity and connection. People begin to think, prioritize and make decisions from a position of wholeness. This, in turn, equips them to act collaboratively, in service of the greater good. One might describe this as a concrete manifestation of Gergen's call for 'a joint creation of meaning, … in which the parties … can create new realities and ways of relating … [and] generate … mutually congenial realities' (Gergen, 2009, p. 122).

Whole System 4-D Dialogue

Yet another way to take AI to scale is the whole system 4-D dialogue (Whitney and Trosten-Bloom, 2010, pp. 33–34). This often includes long-term, large scale combinations of one-on-one interviews, small group gatherings and online outreach *in addition to* summits. Taking place over a period of several months to a year or more, whole system 4-D dialogues can engage hundreds, perhaps thousands of people in generating new shared narratives that unleash hope and pave the way for positive new futures.

Engaging Hearts and Minds

Harlene Anderson suggests that 'Stories are mysterious; they are … unfamiliar and surprising…. [They] invite wonderment and curiosity whereas a problem … invite[s] solving and repairing' (Anderson, 2003). Regardless of the design, large scale AI connects the *hearts and minds* of large numbers of people of diverse perspectives by bringing them together in the spirit of curiosity, to hear and learn from one another's stories of hope and experiences of success. This, in turn, prepares them to create new and more promising narratives and understandings. Through widespread conversation, dialogue and deep listening, people re-create the worlds in which they live and generate momentum for positive change.

SEVEN CONSIDERATIONS FOR LARGE SCALE AI

What enables large scale AI to succeed? Experience with the methodologies described above, spanning a wide array of initiatives varying in geography and size, reveals seven questions that must be considered when taking AI to scale. For each question, we offer real-world examples of how different organizations and communities have responded to these questions:

1 Who should be involved, and why?
2 What purpose will compel a large number of people to actively participate?
3 What will connect people across differences?
4 What engagement strategy best reflects participants' lifestyles and preferences?
5 How will large amounts of data be collected and integrated?
6 How will new participants validate and build on prior work?
7 What is the relationship between emergent activities and mainstream structures?

Who Should Be Involved, and Why?

In small scale AI initiatives, consultants or change agents often take the lead in developing questions and processes. But large scale AI is purposefully designed and driven by representatives of the larger system. A key task for a large process, then, is to determine who should be involved, and why: to identify and establish a *relational infrastructure* that

both engages the whole system (in the AI process) and supports implementation during and beyond the Destiny phase. In essence, this begins by engaging people and perspectives that reflect the whole system.

Even before an initiative has launched, this commitment to engaging representatives of the whole has implications. A city of almost 90,000 people hoped to use large scale AI to develop a citywide strategic plan. But an initial three-person group of project leaders (convened to consider who to involve) realized something was wrong. While their community was roughly one-fourth Latinx, none of the project leaders had deep insight into or strong relationships with this part of the community. They invited a bilingual Latina to join the leadership team, thereby expanding their capacity to connect with people of Latin American descent. This early course-correction resulted in robust engagement of Latinx community members in development of the community's future vision (Roney, 2013).

In addition to project leaders, many large scale initiatives involve a planning team as co-designers/facilitators of the AI process. At their best, these planning teams are a 'microcosm of the whole'. In other words, they collectively *mirror* the larger system being affected (Whitney and Trosten-Bloom, 2010). Together, team members participate in facilitated processes that enable them to determine: what they're trying to achieve (*purpose*); who needs to be involved (*people*); and how or what participants need to experience to achieve said purpose (*process*). By co-creating and facilitating the process, planning team members acquire AI skills, confidence, and relationships with one another. They learn how to use AI to address ongoing challenges and opportunities, and gain the capacity to serve as positive change agents.

The Denver Museum of Nature & Science aspired to forge a more inclusive museum vision *in partnership* with people of color; but they didn't yet have strong enough relationships with the targeted communities to achieve the levels of engagement they sought. Their solution was to prepare outreach 'ambassadors': people who were part of the communities in question, who would partner with the Museum both to design the initiative and attract community participation. One relationship at a time, they recruited and formed a planning team comprised both of staff (from different levels of the organization) and community members (representing the missing voices). Together, team members created interviews, branded the initiative, and hosted community meetings and a summit. Having formed and experienced positive, collaborative relationships with the Museum, many community members chose to *stay* connected. They continued to provide input on everything from design of a mobile outreach van, to development of an outdoor space, to radical redesign of exhibit space.

An insurance company similarly engaged ambassadors, calling them 'culture champions'. Their job was to facilitate *community conversations* involving every member of the company's workforce. The content of these conversations fed directly into an AI summit, in which participants developed new cultural norms, systems and structures (Trosten-Bloom et al., 2015).

Whatever the approach (a diverse planning team, outreach ambassadors, or culture champions), a foundational first step is establishing a relational infrastructure capable of reaching and engaging the whole system. This enables all those who *need* to be in conversation to be *involved* in creating the desired change.

What Purpose Will Compel a Large Number of People to Actively Participate?

The purpose of a large scale AI initiative – like that of any AI process – is explicitly positive: something people *want more of*. The purpose must also be relevant for all parties whose future is being created.

In addition, large scale AI processes are explicitly designed to attract large numbers of people with different perspectives. The more positive, relevant and compelling the purpose, the broader the engagement.

Colorado Access (COA), an affordable health insurance provider, was threatened with reduced Medicare reimbursement because customer satisfaction was low (as reported on the annual CAHPS survey[2]). While company-wide connection to the mission was high, the 3600 Medicare members' day-to-day experience was less than optimal. COA had less improve customer satisfaction scores to than a year to avoid budget-breaking penalties by improving customer satisfaction scores. It was essential that a broad cross-section of the workforce come together quickly to develop system-wide solutions. Rather than focusing on the problem of poor customer experience, they invited people to *co-create a shared vision for service excellence.* This purpose and process was compelling and meaningful to employees, customers and service providers alike.

What Will Connect People Across Differences?

Large initiatives purposefully invite people of significantly different points of view to align around shared aspirations and actions. They call for creative integration: a bringing together of multiple – sometimes opposed – ways of seeing. As Sheila McNamee suggests, 'Many of us feel the need … to understand, to connect. … The central requirement is for us to move beyond either/or thinking … to step into and embrace the diversity of moral stances that we confront in today's world' (McNamee, 2008, p. 1). To achieve this connection and integration, large scale AI aspires to *put relationships first* by inviting people to share personal stories and perspectives … to feel pride in their own experience and wisdom and connect to a positive vision for the whole. The resulting foundation of trusting, uplifting relationships enables people to move beyond 'common ground,' and seek instead *higher ground.*

In 1996, 200 people gathered in San Francisco to consider how to form the organization now known as the United Religions Initiative (URI). Their opening activity – an appreciative interview – invited them to partner with someone they didn't know, who was as different from them as possible. Since participants came from radically different spiritual, cultural and national backgrounds, summit organizers invited them to both *honor their differences* and *connect to something greater* through appreciative questions like these:

> Each of our communities of faith have special gifts – traditions, beliefs, practices, values – to bring to the arena of interfaith cooperation and action. As you think about your community of faith, what are some of its most positive qualities or gifts that make it capable of entering into cooperation with others to build something like a United Religions?

Beginning with this exploration of their *own* beliefs and texts, participants took the first step in forming the global grassroots interfaith network that was eventually chartered in 2000. Today, the URI involves 1010 'cooperation circles' working in 108 countries, all in service of a compelling purpose: 'to promote enduring, daily interfaith cooperation, to end religiously motivated violence, and to create cultures of peace, justice and healing for the Earth and all living beings' (URI, 2019).

What Engagement Strategy Best Reflects Participants' Lifestyles and Preferences?

Reaching out *broadly* within an organization or community often requires reaching *beyond* those who are inherently interested in and available to spend time on the topic at hand, using different engagement approaches for different audiences. Ultimately, the most effective engagement strategy is tailored to

potential participants' lifestyles and preferences. *Representatives* of the whole system – planning team members, ambassadors or champions – ensure that engagement and outreach efforts are sensitive to *what will work best* for targeted populations.

The Adams 12 Five star School District includes 4400 employees serving more than 39,00 students. It includes 50 school sites located in two counties and five cities. In launching its new strategic planning process, the district sought to engage students, parents, community members and staff at all levels, in all schools, in a way that fit with school schedules. With input from a planning team that reflected these perspectives, they designed a variety of processes to engage these different stakeholders. Principals and learning specialists were trained as ambassadors to facilitate a condensed two-hour AI process in every school, involving both staff members and students. They also hosted open community meetings and a large forum with nearly 100 Spanish speakers. An online data collection system enabled participants in the various gatherings to record what they were learning in a consistent database, in real time. Finally, online surveys reached those who could not participate in person.

These early outreach efforts attracted diverse participation and generated enthusiasm for continued involvement. They encouraged and enabled more than 230 students, parents, community members and staff to participate in a one-day summit (that ended mid-afternoon to accommodate students' and parents' constraints). The summit's goals were to validate what had been learned in the earlier engagement and identify priority strategies and actions.

As the engagement concluded, School Board president Kathy Plomer commented on the effectiveness of the engagement strategy:

> Getting authentic community voice is one of the hardest but most important things you can do in a school district. Taking a risk to try a unique and inspiring process meant we did not just hear from a narrow slice of our community, but included and acted upon different voices that are not always heard. (Plomer, 2019)

Ultimately, more than 7000 people contributed to the district's five-year strategic plan. Widespread understanding and support provided the foundation for a successful ballot initiative, which enabled funding of the plan's priorities (Adams 12 Five Star Schools, 2019).

In large national or international organizations, the engagement strategy must enable authentic integration of input from different geographic areas. Such organizations may design an extended period of local or regional inquiry, followed by a large summit involving all levels, all functions and all locations. Alternatively, they may host a series of regional AI summits culminating in an 'integration' summit where representatives of the regional gatherings, along with newly engaged team members, build upon the earlier gatherings and set direction for the whole.

Yet another approach is to *integrate* in-person and virtual platforms, as was the case with World Vision's classic large scale inquiry. Here, an online portal enabled representatives of a 20,000-member international workforce to respond to questions during an extended period of Discovery. Then, during a four-day AI summit, daily summaries were distributed to 100 regional groups in 52 countries. More than 4500 people commented virtually on these summaries, and comments were synthesized overnight and presented the following morning. This established 'a spirit of collaborative participation far beyond the meeting room walls' (McQuaid and Cooperrider, 2018, p. 209).

In community building, the challenge may be to connect with large numbers of people scattered over a large geographic area. Imagine Nagaland reached out to adults and children in a region of 2 million people by using a mass-mobilized inquiry. They began by convening 70 people, a third of whom were children or young people of different

tribal origins, who together represented stakeholder groups from all of the country's geographic districts. Each member of this group conducted six interviews … then each interviewee conducted their own interviews. These one-on-one interviews enabled people throughout the region – even in remote areas – to participate. Eventually, representatives from the state's eight districts came together face-to-face to build upon what they'd learned and complete the 4-D Cycle (United Nations Children's Fund, 2002).

In each of these examples, representatives of the whole designed engagement strategies that reflected participants' circumstances and preferences. These thoughtfully designed strategies enabled diverse, sometimes disbursed participants to have meaningful conversations with one another, and to co-create new futures.

How Will Large Amounts of Data be Collected and Integrated?

Large scale AI processes often involve an extended period of inquiry in which hundreds or even thousands of stories and recommendations may be generated. As combinations of interviews, focus groups, community conversations and surveys are taking place, participants and facilitators record and/or synthesize what they are learning. Data may include transcribed interview notes, summary sheets, and/or artifacts of group gatherings. Project leaders and teams must determine how faithfully to gather, organize and *make meaning* of this data.

A diverse group of people (sometimes a planning team, sometimes a separate group of representative volunteers) makes meaning of this data through a collaborative process of reading, reflection and dialogue. First individually, then in pairs or small groups – perhaps using qualitative analysis software – people extract and prioritize key success factors, strengths, hopes and dreams for the future, along with ideas for how to move forward. Often returning to the original interview notes, they identify stories that are both compelling and illustrative of the final themes. The outcome is a synopsis that captures the essence of what has been shared in a manner that is clear, uplifting and engaging for both those who have yet to contribute *and* those who have already participated. In a multi-lingual environment, this synopsis will be accessible to the full community of participants, regardless of native language.

Later in the 4-D cycle, individual perspectives must be integrated. Participants may be asked to craft a vision statement, identify priority findings or actions, or organize for implementation. Targeted processes for reflection, integration and feedback enable people to hear multiple perspectives, provide appreciative feedback, and make choices or recommendations focused on the good of the whole. In short, large scale AI connects and integrates both people and data across differences, to create a unified sense of direction and action.

How Will New Participants Validate and Build on Prior Work?

Large scale AI initiatives often take place over an extended period of time. People come and go, and consecutive gatherings must validate and build upon the work of previous activities or events. In effect, every 'touchpoint' becomes a miniature 4-D Cycle, with experiences and data from previous activities becoming part of the process. For example, the Discovery phase might refer back to the list of strengths (or positive core map) that was generated earlier; the Dream phase might begin with a review of art projects produced during previous gatherings; or design prototypes or statements from a summit might anchor follow-up Destiny activities.

Referring again to the Adams 12 Five Star Schools strategic planning process,

more than 3000 people reflected upon the district's strengths and generated ideas to make their hopes and dreams for the district a reality. The planning team synthesized and streamlined strengths, then clustered ideas for the future into 'focus areas' for review and validation by the broader community (via an online survey). Then at the summit, the condensed and validated list of strengths served as topics for the opening interviews. Planning team members gave brief presentations about the final six 'focus areas', and participants self-organized to define and plan priority actions for the focus area that most interested them.

What is the Relationship Between Emergent Activities and Mainstream Structures?

As inquiries lasting months or years conclude, new systems, structures and processes are launched – often by self-organized action or innovation teams. How, then, are these *emergent* teams connected with the organization's or community's *formal* hierarchy or structure? Each organization's or community's answer is different.

Colorado Access' whole system 4-D dialogue engaged more than 25% of its 500-person workforce, along with key customers and partners. It resulted in 16 implementation teams addressing issues such as: employee onboarding and training; member wellness and education; new and refined IT systems; knowledge management; and succession planning. These teams were then integrated with six *existing* strategic planning 'work streams' (that had formed pre-AI) in an 'implementation launch'. There, team members from both the AI process and the strategic planning effort connected the two processes by developing charters for high priority initiatives and forming work groups to plan first steps. The result was widespread commitment, grassroots accountability, and accelerated implementation of the company's strategic plan.

LARGE SCALE AI: MORE THAN WORTH THE EFFORT

Large scale AI might seem overwhelming. It is often resource intensive, and as suggested above, sometimes quite time-consuming. To be effective, consultants and system members design and facilitate processes *in partnership* with one another, which can tax the organizations' people, time and talent. Community-based initiatives are often organized by volunteers, which adds the dimension of uncertainty to resource planning. Finally, tangible takeaways are only evident once the process is well underway; and may not be fully realized for months or even years after the process is complete.

So why do some organizations and communities choose to make the investment to engage large, diverse groups of people in discovering, dreaming, designing and delivering change? They do so because the benefits more than outweigh the effort. These benefits include:

- Authentic engagement of those whose voices are not often heard;
- Trusting, collaborative relationships across large, diverse and disbursed systems;
- System-wide transfer of knowledge and understanding;
- Collective images of positive new futures;
- A positive collision of ideas, resulting in breakthrough insights, energy and innovation;
- A sense of shared responsibility;
- Inspired collective action; and
- Enhanced appreciative capacity, both individual and collective.

In short, large scale Appreciative Inquiry enables people with different voices, backgrounds, and perspectives to speak, listen, learn, imagine and create – *together*. Conversation leads to understanding, understanding to insight, insight to imagination, and imagination to action. Thus, powerful connections – forged through conversation – pave the way to promising new futures.

Notes

1 For readers interested in exploring AI theory and practice at more depth, we offer the following resources: (1) Appreciative Inquiry: Change at the Speed of Imagination, Watkins, J. and Mohr, B.; (2) The Power of Appreciative Inquiry: A Practical Guide to Positive Change, Whitney, D. and Trosten-Bloom, A., at Appreciative Inquiry Commons: https://appreciativeinquiry.champlain.edu

2 The Consumer Assessment of Healthcare Providers and Systems (CAHPS) is a series of patient surveys rating health care experiences in the United States. Results are used by Medicare – a federally supported health insurance program – to determine the level at which health providers will be reimbursed for services delivered.

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