

Appreciative Inquiry and Shared Values: A Case Study

Joan Ruelle

Elon University

Abstract

In this case study, the author offers an example of using an appreciative inquiry framework to intentionally articulate shared values to actively cultivate trust and foster a nimble, dare-to-fail organizational culture.

Keywords: *appreciative inquiry, strategic planning, organizational values*



This is an Open Access article distributed under the terms of the Creative Commons Attribution 4.0 International License (<http://creativecommons.org/licenses/by/4.0>), which permits unrestricted use, distribution, and reproduction in any medium, provided the original work is properly cited.

Appreciative Inquiry

Utilizing David Cooperrider's (2003) theoretical framework, it is possible and can be transformative to challenge a library's culture to shift away from a problem-solving mindset to an appreciative inquiry (AI) mindset of articulating and building upon strengths and fundamental values. Traditional approaches to problem-solving often start from a negative position (this is a problem, let's solve it), whereas using an AI framework can instead begin from a positive position (we're great at this, how can we leverage that strength to do more and be better?). A problem-solving approach can be effective in the short-term, and may even feel successful in the moment, but letting problems alone drive action can lead to a whack-a-mole approach that lacks overall vision, mission and identity. At Carol Grotnes Belk Library at Elon University our cultural transformation involved a shift away from a long successful focus on effective problem-solving towards a future-oriented visioning that built upon our greatest strengths. If we wanted to be mission-driven, what was our mission?

Shared Values

We started with deep and honest exploration of our shared organizational values at an all-staff retreat where we asked ourselves, reflected on our answers, and discussed the following questions:

- Who is the library? Who do *we* think we are? Who do *our constituents* think we are?
- What is our reputation? What do we want it to be?
- What is the current experience of our patrons? In an ideal world what would that experience look like?

For the patron experience exercise each of us had a piece of paper, portrait orientation and were asked to draw the current patron's experience – no apology for artistic talent. Then we flipped the papers over, and on the blank side in landscape orientation we each drew the ideal future experience

we want for our patrons. We then did a pair/share and discussed our observations and possible actions to achieve the ideal future experience. Some things were immediately obvious – the size and height of our service desk was perceived by many as a barrier to approachability, so we prioritized changing the desk. Other things were less obvious – newcomers were concerned about signage and directional confusion while to long-timers the geography had long become familiar.

Using Brian P. Hall’s (2006) definition of values, “the ideals that give significance to our lives, that are reflected through the priorities that we choose, and that we act on consistently and repeatedly (21),” we explored the values that created the foundation for our work. In our case, the primary core value that drove our best work was relationships – with each other, with students and colleagues across campus, and within the profession. It’s important to emphasize that the library was not broken when we began this process. A gifted and devoted staff provided excellent services to the campus community and had done so for years. As a new dean, everywhere I went, people told me stories about members of this fabulous team – they were respected, well-liked, and trusted “go to” people who could deliver anything requested in a timely manner. We were positively known for being responsive, but wanted to take our service to the next level and be proactive. How could we anticipate needs and address them before they became problems to be solved?

In addition to considering the library as a whole, it was also important to ask similar questions about individuals – are people in the right positions? Are there opportunities for individual growth, re-energization and potential best-fit reorganization? Each member of the staff participated in a “dream job” exercise, where they answered the following questions: If you could do any job or task in the library, what would it be? What current responsibilities would need to be taken up by someone else to make it possible for you to do that work? Through discussing those dreams and responsibilities, we

explored who was happily in their right-fit, and who was eager to try something new and different. Temporary changes were implemented to allow some interested staff to try a new role, and in some cases those roles became permanent. Such blue sky exercises were understandably engaged with differing levels of enthusiasm and trust, particularly under new organizational leadership. Those who demonstrated trust and engagement with the process were rewarded with opportunity. Other staff members who were more wary were not punished for their reluctance, but wishes kept secret cannot be acted upon. While we have not done another all-staff “dream job” exercise, it has subsequently provided a shared language for conversations with individuals who are interested in exploring new opportunities. By acting on the results of those conversations, rewarding trying things, and (perhaps more importantly) supporting the abandoning of things that didn’t work, the entire library team was able to demonstrate the potential of flexibility and a dare-to-fail attitude built on a solid foundation of shared values.

Over a multi-year process of asking and answering these difficult questions, our organizational chart transformed from a tidy hierarchical structure of who does what to a messy web of overlaps and intersections depicting who is connected to whom. Taking risks is rewarded, and when things that don’t go as planned, they are reviewed for lessons learned, value gained (sometimes what we didn’t plan was the real reward), and some things are left behind with no regrets. It didn’t happen overnight, but with time we’ve built an environment where (and this was a stretch for some of us) we sometimes proceed boldly without a plan in place.

Strategic Planning

These vulnerable moves are only possible because we are all on the same page about our fundamental values. We identified and articulated our shared values, and then proceeded to

demonstrate our trust in one another to enact those values in our respective areas of expertise. After working together with shared values and expectations for a couple of years, we were ready to create our new strategic plan. Through a series of structured staff meetings and a half-day retreat we completed a SOAR analysis (the AI alternative to a SWOT) (Stavros, Cooperrider, & Kelly, n.d.), rewrote our mission statement, and drafted our strategic plan during a single summer. Over the Fall term, drafts were reviewed, discussed, and revised with input from the entire library staff, and a town hall meeting was held to share the final draft and seek feedback from the university community. Begun in June, our new strategic plan was completed in December, and by the time it was published, it had already been integrated into our annual review process and was guiding our communication, planning and action as our compass for the years ahead.

Boldly Going

Once we had articulated our values and enacted those values to cultivate trust across the organization, we built greater comfort in trying things. Many things. Without requiring a pre-ordained outcome for every interaction, we became profoundly opportunistic as we sought to deepen relationships and be open to what opportunities may emerge. We got out of the library and met our patrons where they live (sometimes literally), we attended events where people sometimes wondered why we were there, we showed up. Results from these relationship-building efforts are diverse: we are teaching more (and more meaningful) library instruction sessions with faculty colleagues, and some of our librarians have co-taught study abroad courses. Librarians have co-presented at both library and disciplinary conferences with members of the faculty, and are co-authoring articles and book chapters. We hosted a human library and a putt-putt golf tournament with partners from residence life, student success partners from academic advising and disabilities resources have moved into the building with

us, and an inflatable t-rex costume lives in the dean's office and the t-rex makes an appearance at events throughout the year.

Through intentionally identifying and centering our fundamental value of cultivating and deepening relationships, we have enhanced not only the perception of the library and library staff on our campus, but the quality of our relationships and the opportunities that emerged from those connections. We still solve problems when they arise, but our identity on campus is that of partners, collaborators, and innovators. Within the library, we trust one another to make choices that reflect our shared values, we encourage one another to try bold new things, and we pick each other up when things fall flat – because we know that even if an initiative didn't go quite as planned, the relationship cultivated may blossom into something greater in the future.

References

- Cooperrider, D. L., Whitney, D., & Stavros, J. M. (2003). *Appreciative inquiry handbook*. Bedford Heights, OH: Lakeshore Communications.
- Hall, B. P. (2006). *Values shift: A guide to personal and organizational transformation*. Eugene, OR: Wipf & Stock.
- Stavros, J. M., Cooperrider, D., & Kelly, D. L. (n.d.) *Strategic inquiry → appreciative intent: Inspiration to SOAR: A new framework for strategic planning*. Retrieved from <https://appreciativeinquiry.champlain.edu/educational-material/strategic-inquiry-appreciative-intent-inspiration-to-soar/>