

Appreciative Strategic Planning at World Vision USA

Friday December 16, 2011 -- Jindra Cekan

World Vision's Food Security and Livelihoods (FSL) team in the International Programs Group undertook a three-day strategic planning retreat in September 2011. The retreat was to help the group set the FSL's vision and mission and an action plan based on a shared team understanding of common strengths, capacities and industry and organizational context. The retreat was to also build a shared sense of teamwork, as the new team was composed of members of three different teams.

Appreciative Inquiry was used in four ways in conducting this planning; in framing questions, in ensuring each activity built on past success, in dreaming about desired futures and in using its principles during the process of the retreat.

First, in framing the questions to staff, such as asking what were hoped-for outcomes if the retreat was to be a success, and what would be fun to do. The AI approach was presented as helping the team understand and build on what's already done (such as WV's current strategy organizational strategy, already finished aspects of strategic planning and current partners' Logical Frameworks that could be adapted to the FSL team). Fun was incorporated through a creative Icebreaker "Teamwork to Improve a Child's Life" by asking participants to choose random odd objects from a bag and work together to improve the life and joy of a child. Creative ideas included MerryGo wells, fishing rods, boats with food aid, and the like.

Each activity focused on existing successes within and outside of the organization. We acknowledged yet 'turned around' the document that the team had prepared about current industry trends in Food and Livelihood Security which was focused on what were obstacles by prioritizing them and asking which of them offered the organization the most opportunities to grow. WV's organizational core values such as being committed to the poor, being good stewards and being responsive to needs were customized to FSL. Programmatic gaps were identified and steps taken to create a 'whole team' of the three earlier groups. We discussed what some of the best practices were in the field or among other partners that the FSL could share or adapt.

During the process of the two-day retreat, the facilitator and senior staff repeatedly heard and appreciated staff members input. Interviews had illuminated the deep desire by staff to have the strategic plan set clear programmatic and resource directions that are held to in winning more resources through focus and expertise. The abundance of team capacities that could be shared was acknowledged and celebrated.

We also dreamt together. An exercise was done to help vision what resources and programming existed in 2011 versus what the team dreamt they could be in 2016. An example of an Em(power)ment pyramid for focusing programming priorities is featured below.

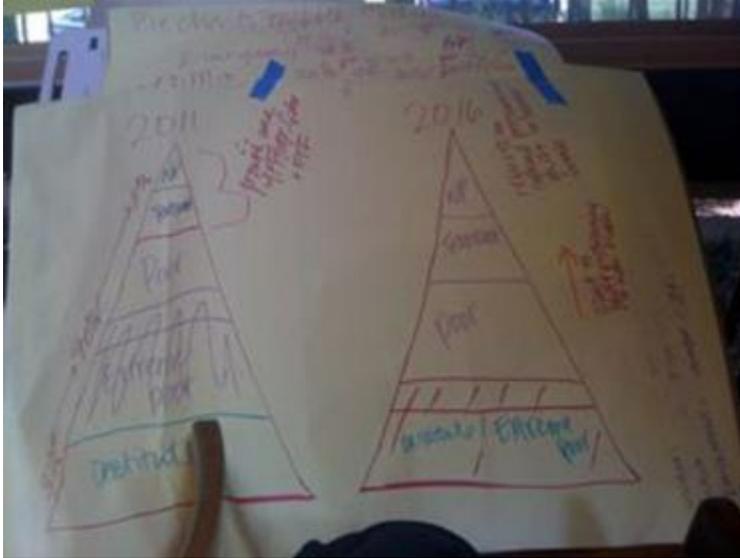


Photo attribution: Paul Macek, Sr. Director, World Vision USA

At the end of each day, participants were asked what was one thing that they learned or that surprised them and one thing that was still unclear. The facilitator and senior management there reviewed this feedback and addressed them in subsequent days. This was found to be a very empowering exercise which kept the retreat moving forward well collectively. Toward the end of the retreat, a list of needs (for this plan to be successful) was drafted, which included participation by other departments, new staff, more technical collaborations etc. Acknowledging the need for support and that staff time spent on this planning and reporting back would be appreciated was . . . appreciated.

Also what emerged was a determination to clearly state needs to senior management, which was promised and incorporated into the action planning (e.g. to disseminate drafts to senior management, launch by late February 2012 and have an annual strategic report card of results). WV FSL's desire and ability to build on excellent work already done and staff that already had clear competencies emerged and woven through the goal and mission statements, strategic objectives and results as well as the more specific action plans that were to complete, launch and implement the strategy in the three years to come.

The Appreciative Inquiry approach to questioning, framing current options positively based on current strengths, dreaming possible futures and appreciating one another made this retreat a success. Paul Macek, senior director of the Food Security and Livelihoods team at World Vision U.S. said "the Appreciative Inquiry approach allowed the participants to quickly move from issues to solutions. In particular, it allowed us to get beyond individual frustrations and particular issues or experiences, while moving to aspirations for the strategic plan."



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Jindra Cekan has over 20 years experience in international development, using participatory approaches to knowledge management, monitoring and evaluation (M&E), food security and livelihoods. She has worked in 16 developing countries with non-profits (mostly in sub-Saharan Africa, Central America and the Balkans), often extensively interviewing rural women, men and youth for project design and M&E.

She has run her consulting firm for 10 years, both solo and gathering expert teams to serve clients such as the Bill and Melinda Gates Foundation, Johns Hopkins University, USAID, Mercy Corps, Save the Children, Lutheran World Relief, and CARE using Appreciative Inquiry, especially in M&E and Strategic Planning. Jindra has a PhD in International Political Economy from The Fletcher School of Law & Diplomacy at Tufts University and lives in Washington DC. Appreciative Inquiry brings positive life to all her projects.