

Whole System Engagement through Collaborative Technology at World Vision

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When Lars Gustavsson, Vice President at World Vision was asked to lead his organization's *Big Goals* strategy process, he knew he faced one of the greatest challenges of his professional career. With over 20,000 employees, World Vision is the world's largest distributor of food and feeds over seven million people each year through its international relief programs. It is known for its participative approach to leadership and management. World Vision's headquarters, in fact, actively channels decision-making to its regional offices that are distributed across almost 100 countries throughout the world. Only by driving decision-making to the local level, it is believed, can the greatest impact be achieved.

Lars was chartered with engaging the entire organization in a planning process to set World Vision's goals for the next 10 years. Having had some prior experience with Appreciative Inquiry (AI), Lars quickly selected AI to guide the approach. The challenges were related to cost, time, scale and continuity. The budget for the project would only allow 150 stakeholders to come together, face-to-face for an AI Summit. Different parts of World Vision's organization had already been engaged in various deliberations related to strategic planning; a leadership group had begun the process of environmental scanning, another had begun to question "who are we" in terms of Collin's Hedgehog analysis (Collins, 2001), and yet another senior group had begun the long process of considering major work re-design. All these dialogues were revealing implications for strategic goals and objectives. Finally, after spending the past two years in a system wide participative process to revise and renew their vision statement, the World Vision leadership was adamant about aligning new strategic goals with this vision in an equally engaged process, but in a dramatically shorter time span. Lars had only four months to pull it off, and was mandated to find a way to invite every employee and stakeholder group to participate, somehow, in the process.

Background

The challenges that faced Lars and World Vision are not uncommon. More and more companies, nonprofits, and communities must do more with less, within shorter timeframes. At the same time, the benefits of engaging the whole system in strategy development and organizational change are often recognized, but many "large group" interventions in very large systems are limited to involving representative samples of organizations or communities. As a result, the challenges are often the same:

- ✓ how to tap into the knowledge, contributions, and resources from the broader organization;
- ✓ how to “bring along” those that are not able to be fully involved;
- ✓ how to engage stakeholders in an experiential process so that new strategies are wholeheartedly embraced and new processes rapidly implemented.

The world has changed significantly since the initial introductions of Future Search (Weisbord & Janoff, 1995), Appreciative Inquiry (Cooperrider & Srivastva, 1987), and other methods applicable to large group work. It is now possible to invite and engage the whole system – literally – to participate in strategic change processes. The benefits of involving an *entire* community of stakeholders extend and enhance the many positive contributions already inherent in many large group interventions (Bunker & Alban, 1997).

The Internet, e-mail, and web collaboration tools have created new possibilities for engaging people across time and space, both within and across groups, organizations, and communities. Integrating collaborative technology focused on expanding the possibilities for participation can allow for broader stakeholder engagement in ways that facilitate learning, input, dialogue, creativity, and action. No longer does the quality of a project or intervention need to be limited by the “size of the room” or by travel constraints.

A set of questions naturally emerge from the collective awareness of today’s interconnected global environment that underlie the growing inspiration to use technology as a tool to support organizational change. These questions include:

- ✓ How can we most effectively capture, share, and use the knowledge and insights of the entire organization to support our goals?
- ✓ How do we most effectively engage the entire organization and set of stakeholders, even when time constraints exist, and not everyone is able to meet together face-to-face?
- ✓ How do we sustain and grow the momentum created through face-to-face meetings and events so it leads to true innovation and inspired positive change?
- ✓ How do we accelerate the adoption of new strategies and organizational changes in ways that are supported by participative values and practices?

Voting and polling technologies frequently support many face-to-face large group meetings, capturing the pulse of a group and accelerating decision making. We are now on the cusp of a new generation of methodologies that apply technology to facilitate new forms of collaborative interaction that extend the reach of these large group events or even standalone as virtual interventions in themselves.

WORLD VISION'S "BIG GOALS" INITIATIVE

Four months before World Vision's Appreciative Inquiry Summit, Lars Gustavsson and the World Vision Big Goals steering committee established a bold game plan. The summit would be held in Bangkok, Thailand and would involve 150 representatives from the organization's 100 field offices and other stakeholders, including partners, donors, and even the voices of children (children receive the bulk of World Vision's services). The objective of the summit was simple: to establish a set of "big goals" for the next 10 years to guide the organization as it redesigns its global and regional strategies and work processes. Though the objective was simple, the approach would push the boundaries beyond what had ever been done before.

The Big Goals steering committee included the organization's top leadership – from World Vision's President to Vice Presidents and Directors responsible for international development, human resources and organizational development, knowledge management and information technology. The committee also incorporated support from two key partners: Ron Fry, Professor at the Weatherhead School of Management at Case Western Reserve University and a group of doctoral students, and a team from iCohere, a software and consulting firm focused on creating collaborative online communities that apply web-based tools for supporting appreciative inquiry and other organizational development processes.

The steering committee defined a highly inclusive process for engaging the broader organization in setting the big goals. The process would begin six weeks prior to the scheduled summit and would consist of a cascading "top down" inquiry and involvement strategy coupled with a "bottom up" invitation to every World Vision employee to participate in the process. Beginning four weeks prior to the summit, regional inquiry groups would join together once a week for four weeks to explore questions and topics and provide summaries of these discussions online, through the iCohere online community. Each weekly inquiry was designed around the Appreciative Inquiry "4 D" Process: Discovery (when World Vision is at its best); Dream (our preferred future); Design (World Vision's goals to help achieve the preferred future); and Destiny (changes we can begin now to make our goals a reality). Employees that did not have groups to join could participate individually by providing input directly online. And though the Bangkok summit meeting would only include 150 participants, opportunities would be provided to any employee to "participate" through the online community during the four day event. Since World Vision is a truly global organization, all of these activities had to be supported in English, Spanish, and French, the most pervasive international languages.

Preparing for Engagement

Preparation involved creating a detailed "inquiry guide" that established framing and context for the initiative, outlined inquiry group activities for each of the four weeks leading up to the summit, and provided instructions on how to participate online, either

as a group or individually. Communication channels were identified including strategies for “cascading” invitations to participate, originating with World Vision’s President and being forwarded down and out through the various levels of leadership and regional offices through e-mail and voice mail.

Since stakeholders around the world possessed varying levels of technical capabilities and sophistication, the online environment had to be easy to access and use, while at the same time supporting an experience in which participants would actually feel that they were part of a global community working together on a common, exciting goal. It was equally important to make the online participation consistent with the organization’s normal culture of dialogue and work. The inquiries and invited stories were thus framed first in the context of biblical stories and reflections that begin all major World Vision meetings, anywhere in their complex global system. These were followed by appreciative inquiry questions related to the upcoming work of the Big Goals Summit.



Figure 1 – The Big Goals Website

The online community was configured to reflect the spirit of the initiative (see Figure 1), with graphics and photos of children from around the world sprinkling the site – the summit topic was focused on *changing the world with children*. The site was designed to support a range of pre-summit activities including:

- ✓ The ability to view a streaming narrated PowerPoint presentation by the President of World Vision about the importance of the project, of online participation, and the anticipated outcomes from the project;
- ✓ A space for individual and group introductions, including the ability to upload photographs, so that individual and groups could share their hopes and aspirations;
- ✓ An area for entering inputs related to questions from the inquiry guide, including stories about “what gives life to World Vision when it is at its best”;
- ✓ A document library of resources, the Appreciative Inquiry inquiry guide, summit logistics, and other supporting materials such as the preliminary reports of various task forces.
- ✓ Because the online community needed to support multiple languages, participants were provided with the option of logging into the site and reading all material in English, Spanish, or French.

Pre-Summit Engagement

Five weeks prior to the Bangkok summit, all 20,000 employees received an e-mail with an invitation to participate in the Big Goals Summit online. Specific instructions for contributing stories and other inputs through the Big Goals website prior to the summit were given.

Individuals were encouraged to login to the Big Goals website and respond to a series of questions posted each week for the four weeks preceding the summit. Regional office managers received inquiry group facilitator guides providing detailed instructions on how to orchestrate small group discussions in preparation for the summit. Regional groups that were able to meet in-person, met once a week, discussed the weekly questions, and then assigned a representative to provide their collective input online on behalf of their group members.

During the first week, for example, individuals and groups were encouraged to enter stories of exceptional service and amazing results from experiences working at World Vision. For each story, core success factors that were seen to illustrate “what gives life to World Vision when we are doing our best work” were shared, providing further insight into the core strengths of the organization – input that would be used during the Bangkok summit. Figure 2 depicts the online Appreciative Inquiry story capture tool that supported this process.

Week 1 - Discovery
Add New Record

save draft submit cancel

Please submit one or two paragraphs that tell the exceptional story you have chosen (If you are responding as a group, you can submit 2 stories). Now list the two or three core success factors – ones that come from your story – that "give life to World Vision when we are doing our best work." To provide your contribution, click the "Add New Record" button (after clicking this button, please complete the appreciative inquiry story form - when you have finished entering your story, click the "Submit" button at the top right of the page).

1-2 Paragraph Story

Describe an exceptional moment or experience you (or your group) have had when World Vision made a positive difference through working with children. Please enter your 1-2 paragraph Appreciative Inquiry story here.

Exceptional Story One

Office Enter the WV office you represent

Department / Project / ADP If you are representing a department, project, or ADP enter the name of the group

Figure 2 – AI Online Story Capture Tool

Over 3500 people from 40 countries contributed to this important pre-work by participating in the month-long cycle of face-to-face and online dialogue prior to the summit, a team of doctoral students from Case Western Reserve University, searched, sorted, and exported the information provided online and created a summary report that was used as input during the summit.

And then it was time to fly to Bangkok.

The Bangkok Big Goals Summit

With representatives from all geographies and functions, 150 leaders from across the organization converged on Bangkok, Thailand. In addition to World Vision's leaders from across its offices around the world, other key stakeholders convened in Bangkok as well including a number of key donors, external consultants and partners. Prior to the summit, several World Vision members collected comments and stories from the children they serve on video to interject throughout the summit so that their voice was always present.

The summit, designed around the "4-D model" of Appreciative Inquiry, was structured as a four day event with each day focused on engaging both face-to-face and online participants in the 4-D process – Discovery, Dream, Design, and Destiny (Cooperrider &

Whitney, 1999; Ludema, Whitney, Mohr & Griffin, 2003). The integration of the face-to-face summit with the virtual online process was thoughtfully designed by a team led by Soren Kaplan from iCohere and Mark Kelly, World Vision's Director of Knowledge Management. While the idea of using live streaming video and other real-time communication technologies was considered, several factors necessitated a more creative approach to engaging participants, specifically that:

- ✓ Online participation would occur from around the world, across every time zone so to expect those participating remotely to do so on "Bangkok time" was unrealistic;
- ✓ Remote participation needed to involve more than just a one-way broadcast of presentations and discussions;
- ✓ An objective of the Big Goals initiative was to create a participative process that established a feeling of global community across the organization. Virtual participation had to include elements of "community building" like collaborative learning, knowledge sharing and relationship building.

The Big Goals Summit established a model that expanded participation by weaving together face to face and virtual participation. This model supported an ebb and flow of information and interaction that established a spirit of collaborative participation far beyond the meeting room walls in Bangkok. As one participant put it, "you could feel the energy and connectedness from across the organization".

From Meeting Room to Online

At the end of each day in Bangkok, a streaming PowerPoint presentation was developed that included a summary of the day's objectives, activities, and outcomes. Photographs were interspersed within the PowerPoint presentation which gave virtual participants a glimpse into the meeting room and collaborative spirit of the Bangkok summit. Meeting notes were summarized and additional supporting materials were placed online. For example, during the second day – which was focused on "Dream" – Bangkok participants created a number of letters that were written to children. These letters outlined the ideal world that will exist in 10 years, which essentially embodied participants' vision of the future. These letters were placed online, alongside the streaming PowerPoint presentation in English, Spanish and French. Figure 3 provides a screen shot of the "Summit Summaries" area within the Big Goals website that contained these resources.

The screenshot shows a web browser window with an orange header. The page title is "Bangkok Summit" and the logo is "REAL Making the Vision". The start date is "06/06/04". A search bar contains "Day Two Summary PDF", "Letters to Children", and "Virtual Participation Report". A "view" button is next to it. The main content area has three sections: "Purpose" (To imagine a desired future for World Vision), "Outcome" (* Visions of Future We Most Want, * Provocative Impact Areas), and "Questions" (Put yourselves 10 years into the future—it is June, 2014. Visualize the world for children as you really imagine it could be, as if it exists now. Discuss what is happening in the world and locally in regions that is new, better, or different? (Note: this is about what the trends and conditions are for children, in general: not what World Vision is doing.)). Below this is an "Introduction" section with text about a narrated overview and a "Summit Feedback" button. At the bottom is an illustration of a person sitting in a house, with a stream of stars flowing out from the window.

Figure 3 – Summit Summary Area

Instructions were provided to virtual participants on viewing the streaming PowerPoint presentation about how to provide “unstructured” comments and feedback, and as well as how to provide input through the structured format that organized and prioritized inputs related to the day’s specific outcomes.

From Online to Meeting Room

Just as in the pre-summit process, both individuals and regional groups participated online in the four-day Bangkok summit. Over 100 groups from 52 countries organized collective viewing of the daily streaming PowerPoint summaries. And over 4500 people provided input, either individually or through regional groups during each of the four days of the summit.

After viewing a summary presentation, individual participants and group representatives were provided with the option to submit general reflections and comments about the day. Participants then clicked a “Summit Feedback” button to provide more structured input. Early each morning, prior to the start of the Bangkok summit, the inputs from the night before were tabulated and synthesized. A two page “virtual participation report”

summarized the inputs from the broader organization, both quantitatively through tabulated votes, as well as qualitatively through quotes and themes. Structured inputs such as votes and demographic data were available instantly in all three languages. Qualitative feedback in French and Spanish was translated into English, which was then divided up between a small team of doctoral students for thematic analysis. Because individuals had the ability to upload documents, photographs, and other resources, in addition to entering text, many contributions contained rich illustrations of World Vision's existing activities that supported the emerging Big Goals. Figure 4 illustrates a contribution that originated from Nicaragua that describes a local activity that closely ties to one of the identified big goals.



Figure 4 – Online Contribution from Nicaragua

When the Bangkok summit participants entered the meeting room each morning, they were given the virtual participation reports. After the daily agenda overview, a presentation was given that summarized the participation report, showed screen shots of the various contributions and interactions within the Big Goals website, and outlined implications for the day's activities. Establishing a clear linkage between the work to be done in the room and the inputs from around the world instantly created a feeling of deep connection and community, a feeling that the whole system was truly involved, and that the ideas and outcomes from the meeting reflected the contributions of the broader organization.

Impact and Results

The Big Goals Summit produced 16 strategic opportunities areas that World Vision could commit to in order to “Change the World with Children.” These were fine-tuned over the following month into three, overarching ten-year goals, and eight strategic priorities to reach those “big goals.” World Vision’s approach illustrates the power of tapping into the collective learning and wisdom-seeking of an organization through weaving together face-to-face and remote, online participation in the appreciative spirit of positive change. According to one of World Vision’s Senior Vice Presidents, the integration of technology into the Big Goals initiatives resulted in:

- ✓ Higher quality goals and strategies
- ✓ Faster decision-making
- ✓ Rapid alignment of stakeholders around the world
- ✓ Enhanced organizational readiness for implementation
- ✓ A new model of organizational governance and whole-system participation

Input from across offices, time zones, and cultures elevated the quality of the conversations in Bangkok since meeting participants could assimilate the stories, insights and recommendations of the broader organization into their work. Confidence in the specific outcomes of the summit, the big goals that will drive the organization’s future, was significantly elevated since broad organizational alignment was achieved as a natural part of the summit process. Today, World Vision points to the Big Goal process as a turning point for the organization as it strives to significantly increase the positive impact it has on children, families, communities, and the world (Tandon et al., 2005).

REFLECTIONS

To our knowledge, World Vision’s Big Goals initiative was the first of its kind to marry the Appreciative Inquiry Summit methodology for large groups with an online technology to dramatically expand the number of participants and scope of dialogue taking place during a multi-day summit. The results of this integration appear to be positive in both the short and long term. World Vision was able to achieve its goal and translate its new Vision into Strategic priorities and opportunity areas in slightly less than six months while enabling the same level of involvement as they had in creating their Vision Statement over a two-year period.

Among the numerous lessons learned and possibilities for future applications, a number of observations stand out:

Establishing an Internal Coordinating Role Drives Execution

It was critical for World Vision to designate a person to guide and coordinate the preparation and customization of the online web space, pre-summit inquiries, summit design and daily export and import of online participation (with translation) during the summit. The allocation of this resource, almost full-time for three-months preceding the

summit, was essential in coordinating the numerous design and technological decisions required.

An Online with Face to Face Dialogue Increases Engagement

As the summit progressed, it became evident that the inputs from so many online participants were adding to the momentum and energy surrounding the work of the participants in Bangkok. Each morning, as those in the room received the summary of the online input overnight, one could sense the connectedness and interest in “doing good for the whole.” The magnitude and content of the online input heightened the fatefulness and importance of the work at hand.

Encouraging Appreciative Feedback Creates Common Ground

During the Bangkok summit, it was helpful to solicit specific feedback from the online participants but in a way that honored existing work in Bangkok while encouraging positive feedback and input. This was done using three basic questions:

- ✓ Please describe what you like most about this (statement, proposition, aspiration) as it is – what stands out to you, or attracts you the most;
- ✓ What would you add or edit to make this statement more powerful and attractive?
- ✓ What, if any, additional comments or input would you add to the list or summary provided?

This format invited the online participants to participate in a similar way to those in Bangkok when they were asked to comment on each other’s work with the same appreciative questions. The intent of these questions was to continuously search for common ground and areas of agreement from which to work and build.

Encouraging Visual Input Catalyzes a Sense of Connection

The online input that stimulated the most interest and enthusiasm in Bangkok came from photos of the groups and children’s drawings that were part of the online messages. They brought a sense of personal connection to the proceedings that with those online

The Importance of Knowing the Origin and Characteristics of Online Data

It was important, in retrospect, to include a way for online participants to indicate how many were responding and from what parts of the globe – and particularly if they were including the voice/opinion of children in their responses. When the Bangkok participants could see data that showed that many children, or small groups of male and female staff with children, had met overnight to review and react to their work, it brought a sense of credibility and responsibility to the work going on in Bangkok. The demographic data also allowed World Vision leadership to see if they were getting a representative input from online participants. For example, after day one, the input from French speaking areas was quite low, so the appropriate leadership made phone calls to regional offices to make sure people had access and information about how to connect to the summit.

The Right Web Context Encourages the Emergence of Informal Grassroots Community

With the availability of various communication and collaboration tools to support the initiative, the Big Goals website became much more than a vehicle for soliciting input and collecting feedback. At any given time, for example, one could see the names of others logged into the site and invite one or more individuals to a live, online meeting. Throughout the four-day summit, hundreds of individuals came together for ad hoc, spontaneous discussions focused on further exploring the themes of the summit as well as fostering new relationships and rekindling old connections. These conversations were outside of the formal agenda but were ultimately integral to the strategic effort. The context of the website and its simple-to-use tools, along with a clear timeframe for participation, allowed for the emergence of grass-roots communication and collaboration.

Honoring the Enduring Power of the Collective Voice Sustains Alignment

The message sent to leadership through having such a significant portion of the total system achieving a consensus on a recommended list of key strategic objectives was unprecedented. In a subsequent meeting of global leaders to refine and prepare the summit outcomes for review and endorsement at their upcoming World Council meeting, there was a tendency by some to want to re-work the ideas and re-language them to fit with the views of a few senior leaders who had not been able to attend the Bangkok summit. At a powerful moment in these proceedings, one leader commented that they must keep true and consistent with the spirit and message from the “whole system’s” voice that had been heard in Bangkok. This was a turning point in the conversation after which the group was able to reach agreement on the three overarching, ten-year goals, and eight strategic priorities to achieve them.

One Final Question

This initiative used a virtual work space to support a face-to-face summit process, which allowed the summit attendees in Bangkok to validate their work and to achieve a sense that they were ‘representing’ the whole system. The question we are left with is the reverse: can a face-to-face group be in service of the whole system working virtually together? In other words, could the major activities involved in the Appreciative Inquiry 4-D process have been given to all online participants and then have the smaller group attending in Bangkok be the “staff” to summarize, theme, cluster, and feed back these summaries to the larger virtual group. While we approached this summit with the Bangkok group being the “figure” and the online community being the “ground,” we wonder now if the opposite is possible, if not desirable. Instead of viewing the larger online group as the observers, commentators or validity checkers, it seems just as possible and feasible now to have them be the focal work group, using the face-to-face group to provide summarization and feedback. In this way, the five thousand that were participating could truly be “in the inner circle of strategy”, an arguable necessity for the fast changing, knowledge-based global organizations of the future.

As stories like World Vision's become more widely known, more and more organizations will see the benefit of expanding the definition of "large group" in the context of strategic planning and change processes. Organizational development practitioners, strategists and change consultants that apply collaboration and community technologies to the complex organizational systems in which they work will ultimately establish new expectations for what it means to engage the "whole system". Until that time, we can relish the positive examples set by organizations like World Vision that take bold steps to embody the principles of full participation in the spirit of serving its stakeholders and driving positive change.

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END NOTES

World Vision International website: www.wvi.org

Weatherhead School of Management, Case Western Reserve University:

www.weatherhead.case.edu

iCohere Collaboration Software and Appreciative Inquiry Online Tools:

www.icohere.com

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