

Using Appreciative Methods to Evaluate an Appreciative Inquiry Process: Evergreen Cove Holistic Learning Center

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As evaluators have increasingly experimented with integrating Appreciative Inquiry in evaluation, none has applied an appreciative evaluation methodology to study the impact of a full Appreciative Inquiry process in the context of an organization and community. This article presents what we believe to be the first contribution to the literature in both the AI and evaluation fields of just such an evaluation. It examines how elements of AI were successfully incorporated into an evaluation that assessed the results of an AI change process.

Evergreen Cove and the AI Change Process

In 2003, Evergreen Cove Holistic Learning Center (EC) engaged EnCompass LLC to design and guide them in a year-long Appreciative Inquiry process. Laverne Webb, one of the Guest Editors of this AIP Issue, led the Appreciative Inquiry work and subsequently planned the appreciative evaluation of the AI process with the client. The initial engagement expanded and continued over a two-year period. Located on Maryland's Eastern Shore, Evergreen Cove Holistic Learning Center (EC) is an experiential learning center that fosters the growth and integration of mind, body and spirit.

As it began its 10th year, EC entered a critical point in its history, transitioning from its founding leadership to a new executive director. The organization decided to use this opportunity to reconsider its relationships within the community. As EC's mission is about both community and individual health, the leadership sought to expand its reach to the larger community, including the mainstream health sector.

With these goals in mind EnCompass LLC worked closely with the EC leadership to develop an Appreciative Inquiry process that engaged the community in conversations about health and vitality, and how Evergreen Cove could more effectively contribute to growing a healthier community over the next five to 10 years.

Over a period of four months in 2003, Evergreen Cove board members, members and practitioners conducted AI interviews with more than 125 citizens and business and organization leaders throughout the community. The interviews explored questions about exceptional community, support to children and how Evergreen Cove can best support a healthier community in the future. The interviews gave EC valuable insights into how participants define a healthy life for themselves, their children, their community and provided perspectives about EC and the services it offers.

The interviews were followed by a Summit Conference on Healthy Communities, bringing together as many as 50 citizens and business and community leaders who had taken part in the one-on-one interviews. Using an AI approach, the Summit provided a

highly interactive community experience that harnessed a rich diversity of interests and voices to create a vision of the future for the community and for EC. The ideas generated at the Summit guided EC in developing strategies and programs to promote a healthy community and to expand its outreach activities and fundraising.

The Summit was followed by a second AI forum, *Building a Vibrant, Healthy Community*, that launched on-going working groups to implement the visions from the forum. This became known as the “Vibrant Community Initiative,” which continues the AI work today.

The Appreciative Inquiry Evaluation Approach

Appreciative Inquiry methods were used in every step of the evaluation of the Evergreen Cove AI process and its impact on the organization and community. These steps included:

- Focusing the evaluation
- Designing and conducting appreciative individual and group interviews
- Interpreting the results

Focusing the evaluation

The objectives for this evaluation were defined through an initial meeting with core EC leaders to focus the evaluation and develop the questions to be answered through the evaluation.

Developing the evaluation questions

The goal of the evaluation was to measure changes in perception, knowledge and behavior among individual participants, the organization and the greater community since the AI process began. Thus the evaluator developed a set of key evaluation questions that were framed to reflect an appreciative perspective.

Table 1 (p18) depicts a sample of the intervention objectives, indicators that flow from those objectives and the corresponding questions developed to capture information related to the objectives and indicators.

Implementing the Evaluation

The evaluation process consisted of two primary activities — individual interviews and focus group discussions. A total of four individual interviews with key informants were used to gather evaluation data and to assist in the development of the interview guide for the focus groups.

Eleven individual appreciative interviews were conducted with representatives of a cross section of the health and business sectors and from community and church groups, among others.

Three focus group discussions, with an average of 10 participants, were held with EC board members, practitioners, members and donors, organizational partners and community groups including the Health Department, hospital, schools, human services community and churches. The evaluators facilitated one and a half hour-long discussions based on appreciative evaluation questions that were tied to indicators (Table, p18).

Table 1: Snapshot of the Evaluation Focus

AI Intervention Objective	Indicator	Appreciative Evaluation Questions
<ul style="list-style-type: none"> ● Uphold EC values and preserve a close-knit community of members and practitioners 	<ul style="list-style-type: none"> ● Evidence that core values (defined as...) are recognized and utilized. 	<ul style="list-style-type: none"> ● How do some of the new initiatives incorporate EC values? ● How has AI maintained, uplifted, supported and made visible their values throughout the process?
<ul style="list-style-type: none"> ● Be perceived as “client focused” by potential clients and the larger community. 	<ul style="list-style-type: none"> ● Evidence that program and/or services changes are at the initiation of stakeholders. 	<ul style="list-style-type: none"> ● What have been some examples of change based on responsiveness to members and other stakeholders? ● What worked best to encourage feedback from the community?
<ul style="list-style-type: none"> ● Establish EC as a more credible force in the community. 	<ul style="list-style-type: none"> ● Evidence that EC is perceived as a viable partner in the community. 	<ul style="list-style-type: none"> ● What new relationships are they now part of that they were not before? ● How do those new partners or collaborators see EC differently?

Results of the Evaluation

The results of the evaluation can be summarized as follows:

- Increasing recognition and core values were key objectives of the AI process. The evaluation found that EC had remained true to its core values that focused on community, integrity, learning, acceptance, love and spirit.
- The evaluation showed that the AI process had a significant impact by focusing EC’s agenda on stakeholder needs. Decisions for new services and other changes at EC now come from the community, not from the executive board. Through the AI process, EC carefully listened to the stakeholders and members’ needs and wishes regarding EC’s role in the community.
- Another key objective of the AI process was to increase growth of funding sources and revenue streams. In 2003, after the AI process began, EC increased its donor base by 50%.
- Increasing credibility was another important goal for the organization. The evaluation showed that EC is now more recognized as a viable partner by the established health care community, and increasingly by the greater community. As one evaluation respondent said, “It’s like the difference between being on the bleachers and being in the game. We’re in the game now.”

The evaluation also highlighted some challenges that EC faces such as continuing to build momentum from the AI process and building a diverse community. While some long-time members of EC were concerned about becoming too mainstream, newer partners spoke

of discomfort with the part of EC that seems more on the fringes. Some respondents discussed the lack of “actionable items,” and others wished for more clearly defined objectives.

Lessons Learned

Evergreen Cove leaders felt they could learn a great deal from the evaluation because it focused on assets and stakeholder participation. They were also comfortable incorporating the evaluation results into initiatives because the approach was a tested methodology.

The Evergreen Cove case also brought up some challenges in evaluating the AI process. These include the inherent tension between encouraging free rein of the imagination to dream, and the need for evaluators to clearly define objectives and document accomplishments. If the AI objectives had been defined, articulated and documented from the start, it would have been easier to evaluate that intervention. Together AI practitioners and evaluators need to explore ways to conduct an Appreciative Inquiry that clearly defines objectives and indicators without compromising the uniqueness of the AI process.

Another challenge is the reframing of questions to make them more appreciative. If the evaluation instrument leaves no room for negative responses, this appears to constitute a bias for many evaluators. However, in the EC focus groups and interview processes, it was clear that reframing questions did not necessarily halt negative responses. When individuals had a desire to share a negative response, they found a way to do it. Appreciatively worded questions enabled people to address problems, but from a more constructive, solution-focused perspective.

Conclusion

An appreciative process will use evaluation results to foster greater learning. Similarly, an appreciative process anticipates, even wishes for, change that might lead to transformation. Michael Quinn Patton suggests that Appreciative Inquiry does successfully integrate inquiry and action. [Patton, M. Q. “Using Appreciative Inquiry in Evaluation” in *New Directions for Evaluation* No. 100. San Francisco. Jossey-Bass: 2003.] This integration is part of the future of participatory, stakeholder, and learning-oriented approaches to evaluation.

AI processes should be among every evaluator’s key set of tools. Likewise, evaluation should be part of every AI process from the beginning. AI offers a powerful organizational tool that encourages individuals and organizations to image themselves at their potential best. Appreciative evaluation can help them know when they have reached those dreams.

The Evergreen Cove experience suggests that there is great value in using appreciative approaches to evaluate an Appreciative Inquiry intervention. There is also much to be learned about how to effectively build evaluation into the AI process. A number of issues are worth pursuing further. These include: how to find the common ground between the evaluators’ need to define objectives and indicators, the AI process of imagining and dreaming and how to use AI to build evaluation capacity within organizations.

We encourage evaluators and AI practitioners to work together to address these issues and begin building on the Evergreen Cove experience to create a body of AI evaluation work that will inform the field and provide important successes in organizational capacity building.