

focus on practice

ORGANIZATIONAL TRANSFORMATION

United Ways to the Future

For generations, the United Way has been at the heart of building relationships, in communities throughout America, between people in need and people who can help. Local volunteers make funding decisions about organizations and partnerships that provide effective solutions for local human service issues. Determining community priorities is often done via needs assessment surveying with existing donors and agency beneficiaries. This caters to the most vital existing partners, but limits the development of new donors and partners and can under represent the broader community's priorities. As one person put it, "People in nice houses get asked about needs of nameless faceless people." When asked to describe how United Way currently works, one United Way executive drew a moneybag, a sad face and a happy face. He said, "We raise money and send it to the saddest people and agencies [indicated by an arrow from the money bag to the sad face] hoping to make their lives better [indicated by an arrow from the sad face to the happy face]. But we're looking through a window in which we mostly draw attention to how dark it is outside, encouraging deficit-based thinking. How can we change that?"

In January 2003, the Indiana Association of United Ways (IAUW) decided to catalyze a change process. They invited interested United Ways in Indiana to apply for the opportunity to work with Imagine Chicago to design and implement a community Appreciative Inquiry to reframe needs assessment to a more positive impact and solutions-focused process with greater community ownership. Many counties applied and two were chosen. The challenge was to pioneer a new and positive information campaign, which identified and leveraged community value, prioritized opportunities for community investment and expanded community participation.

To build skills for this culture shift, IAUW invited Imagine Chicago to lead a two-day Appreciative Inquiry training for United Way teams from across Indiana in February 2003, and to keynote and provide AI training at the March 2003 Indiana State Leaders conference. From March-December 2003,

the United Ways of Porter County and of Cass County worked with Imagine Chicago to design and implement an Appreciative Inquiry process which engaged large segments of the local population in identifying community strengths and articulating priorities which built on those strengths. Thousands of interviews were conducted, evaluated and summarized, with each process culminating in a community summit. The pilots developed new partnerships, provided important new models for civic conversation, and enhanced the reputation of United Way as a community building organization.

Imagine Porter County

Formed in March 2003, the Porter County Design Team was comprised of twenty individuals, who represented a wide range of community sectors: business, industry, media, government, judicial, education, retirees, nonprofits, workforce development, labor, community volunteers, our community foundation, and United Way Board and staff. A social work intern from Valparaiso University was also part of the team.

The Design Team met every 2-3 weeks during the months of April to June. They developed interview protocols, selected topics, designed and tested questions,

Tasks and Selection of the Design Team

Think broadly: **practice tips**

- ✓ What does the design team hope to accomplish? – for example
 - o designing topics and questions,
 - o determining the flow of the process, including who, how, when and where
 - o serving as community ambassadors
 - o conducting focus groups.
 - o planning a summit
 - o evaluating impact
- ✓ Who should be on design team?
- ✓ What connections do the design team members bring into the process?
- ✓ What do they plan to contribute to making it a success?

determined the interviewing format, and identified target groups. They decided to use a group format with a trained facilitator, which would approach existing groups and ask for time on their agenda to administer the Imagine Porter County (IPC) questionnaire. This primary method of collecting data was supplemented by individual interviews, mailed questionnaires, and on-line website surveys.

The goal was to interview groups of all ages (from adolescents to seniors) and from all sectors (geographic, cultural, social, and economic). A Spanish language version was developed, as well as a questionnaire for youth. Over the next five months, the IPC interview was conducted with 28 groups, totaling approximately 500 participants. Midway through the process, in September 2003, a community leadership summit was held with about 65 people. IPC participants reviewed the information collected to date and highlighted individual stories. Youth leaders engagingly presented their experiences and learnings with IPC. Through dialogue, interesting cross connections emerged, for example, offering newcomers ways to volunteer as a means of incorporating them into the community, reconsidering them as community resources seeking to belong and contribute. Summit participants developed a collective vision for Porter County's future and explored what elements would be necessary to bring their ideas to life.

The Design Team reviewed the evaluations and summary information from the summit and discussed the value of the IPC process. Timing and clarity of purpose proved crucial to the process. Facilitators noted the uniqueness of each group interviewed, and the tremendous value of having a flexible and creative process, which could relate and be adapted to multiple groups.

Questions to Consider in Process Design

- What do you want to understand about your community and why?
 - What questions, ways of working, would encourage everyone's participation?
- What language and other cultural inclusion issues do you need to keep in mind?
 - How will you make the process visible to the broader community?
- What is in it for community?
 - What is it going to cost?
 - How much time will it take?
- What staffing and outside facilitation, or other support, do you need ?
 - What other resources are needed? Who has the resources?
- How will you document the process? Who might benefit from what you learn?
 - How will you organize and use the information you get back?
 - How and who will evaluate the effectiveness of the process?

practice tips

They realized that people truly care about Porter County and the families who live there, value what the community has to offer and want to make it an even better place for their children and grandchildren.

Their hopes for the future focused on economic development and jobs (not surprising in an area of high unemployment due to steel bankruptcies & downsizing), activities which strengthen families (intergenerational volunteer opportunities and recreational activities), more

acceptance of diversity, and public transportation and affordable housing.

The IPC process generated great enthusiasm; people appreciated sharing their experiences. "We learned how to build on and leverage existing networks, especially with organizations that cross boundaries," one design team member commented. "Every group led to the next group. A gentleman on the allocation panel loved the process, so he set up a meeting with Kiwanis. The ED group led to client groups like Hebron Center or Hilltop House with the Neighborhood Association," said another. "It stretched our view. In the past, we've handed people apples and watched them eat them or make applesauce. That's what they know how to do. Now we are asking them to look at using the apples to plant orchards. It's a new way of thinking."

Imagine Porter County gave United Way credibility as a "listening and open" organization. The appreciative inquiry model, and the information learned, are now forming the foundation for future planning processes. United Way of Porter County will take a leadership role in moving from dialogue to action, working with multiple partners to make the shared visions a reality.

C.A.R.E. Campaign – Cass County

Cass County has the highest percentage of Latino population growth in Indiana during the last decade, a rate of more than 1,400%. In January 2003, Cass County stakeholders participated in Vision 2003, a process begun in 1996 to identify areas of strengths and weaknesses and establish goals for its community. Diversity was prioritized as number one of the ten identified critical components of community life. An Appreciative Community Assessment seemed a perfect next step to complete the community visioning process.

A broad based design team was recruited to lead the process, with people selected on the basis of their interest and willingness to engage constituencies with which they had connections. Regular meetings (monthly, then weekly toward the end) were held. Team members took responsibility for identifying interview sites, leading interview processes, data collection, and publicity. The CARE Campaign gave many people a chance to talk and be heard, drawing attention to strengths upon which the community could build (like hospitality, the care of young people, etc.) and energizing and engaging community ownership around common values. Design team members were key to reaching many people through recruiting and training other interviewers. Regular, enthusiastic communication within the design team set the tone for active participation.

During September and October 2003, C.A.R.E. Campaign volunteers conducted nearly 2,000 individual interviews of residents and workers in Cass County. A representative sample of 500 interviews, with an age spread from teen to 65+ , both Caucasian and Latino, was analyzed. Strong themes and values which emerged included the closeness of family ties, the abundance of activities for youth, the small town atmosphere, the feeling of safety, and the overall friendliness.

A community summit was held in November 2003, rescheduled from September to accommodate the large number of people who asked to be interviewed. The range of participants was noteworthy – young and old, Caucasian and Latino, curious mall walkers and dedicated service providers — not just the ‘usual suspects’. The summit brought alive the stories and themes that surfaced in the inquiry process in multiple media: charts and graphs, positive images of Cass County in student videos and art montages.

The summit meeting room was surrounded by powerful quotations taken for the interview transcripts and maps of the county. In the course of the day, the maps came alive with hearts representing places people loved, with assets that emerged from the summit conversations, and with hopes and practical ideas for strengthening the community. The living ‘hope map’ exhibit deeply honored the scope of work that had been done, and the range of perspectives that had been brought to consciousness, showing what was possible and what had already been created. “People enjoyed participating. It was a positive connection to public life. Not *pushing* but instead inviting participation,” one participant remarked.

Sharing stories among community members not typically connected to one another (because of differences of age, race, culture or economic circumstances) built positive relationships. Stories gave participants a constructive way to overcome isolation, suspicion and stereotyping. Many new bridges got built and the United Way’s image as a vital partner engaged in building community capacities was strongly reinforced. One partner explained, “Human beings have a tendency to focus on what they can’t do instead of what they can. Concentrating on what’s possible helps people focus on what’s next.” United Way is now institutionalizing an appreciative approach, and using the information gathered to write grants, solicit volunteers and collaborate even more effectively with partner organizations.



Creating a hope map for Cass County at the C.A.R.E. Campaign summit.



Overall Reflections

The strength and resourcefulness of each design team was critical as was the ongoing commitment of United Way staff to take fullest advantage of the involvement of volunteers. While the design teams struggled early on — as one said, “Envisioning is a

hard and important process; we’re more used to being implementers” — they each created a process that was constructive and grounded in what really mattered to local residents. They talked and thought through how this new thing could work. They listened to one another. Different people took the lead at different stages. Their connections to local organizations (schools, businesses, etc.) resulted in a helpful leveraging and connecting of local networks into a single large-scale process. Each created a much larger project than originally envisioned. Young people were re-positioned as leaders and got enthusiastically involved in producing videos, doing interviews, and making summit presentations.

Although the two counties used slightly different formats, both seemed to be effective. The larger county (Porter) organized around a more leadership-driven model. Cass County worked at more grassroots community visioning, conducting more interviews with a wider range of participants. Their summit was more story-based, informal, consistent with the theme of providing hospitality to everyone. Common success factors shared by both counties included a highly committed United Way staff, board, organizers, facilitators, volunteers and interns; open and available venues for community use; and an active interest in sharing ideas and resources.

The most **important community impacts** included:

- * Developed a stronger civic identity through constructive stories and visions.

- * Created an appreciative and strength-based culture of public discourse, which attracted enthusiasm and built momentum.
- * Youth viewed differently in the community, as resources to civic processes.
- * Increased interest and capacity for looking ahead and taking a longer-range view.

Important United Way impacts included:

- * Challenged established roles and ways of working by creating a positive communications culture and expanding self-understanding and public identity as more than a fundraiser.
- * Enhanced its positive reputation as a listening, partnership organization.
- * Expanded volunteer engagement
- * Gathered new approaches to research and data analysis
- * Suggested potential new areas for future allocations.

Challenges were mainly around finding enough time for the process, warding off negative ‘problem-solving’ attitudes, and encouraging people to share stories (not just ideas) during the interviews. The appreciative approach ran counter to some of current United Way culture including working with established leadership, survey-driven data analysis, and problem-based allocations, though AI was consistent with the organization’s focus on encouraging voluntarism and community connections.

The United Way in Indiana is eager to continue the shift towards more strength-based approaches, and is working this year on encouraging impact-focused community grants which encourage local collaboration. A toolkit from the AI community assessment pilot has been produced and is available by contacting Imagine Chicago, or by visiting www.unitedwaypc.org, www.unitedway.cqc.com, or www.iauw.org.

-Contributed by Bliss Browne, Sharon Kish and Joyce Gebhardt

For organizations launching your own transformation process, consider:

practice tips

Why are you initiating a change process? What do you hope to accomplish?

Who are the people to involve? Who is on the bus in what seats? Where is the bus going?

How might Appreciative Inquiry be a valuable tool for accomplishing your objectives?