

# AI Practitioner

The international journal of AI best practice

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## Bridging Two Disciplines: Applying Appreciative Inquiry to Evaluation Practice

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We welcome the opportunity to present this special issue of AI Practitioner that explores the natural and — until relatively recently — unexplored connections between Appreciative Inquiry and evaluation. Our goals for this issue are to demonstrate successful applications of AI in evaluation work and to contribute to the understanding and credibility of using Appreciative Inquiry in evaluation. The case studies presented here address the importance of maintaining rigor in evaluation methodology and, at the same time, clearly showing how AI approaches can contribute to knowledge and learning through evaluation. Through these practical cases, we hope to generate a broader exploration of the nexus between evaluation and organization development methods such as Appreciative Inquiry.

In working with AI practitioner colleagues and evaluation colleagues over the years, some of whom were successfully blending AI and evaluation, we immediately saw and became excited about the possible connections between these two fields. We published some of this early work in the American Evaluation Association's journal, *New Directions in Evaluation* (Vol. 100, Winter 2003 [www.eval.org](http://www.eval.org)).

We have seen that Appreciative Inquiry offers evaluators and OD practitioners new and exciting tools and processes to improve ways in which evaluations are conducted and to enhance organizational capacity and learning. AI also provides constructive and positive frameworks through which to pose evaluative questions. In turn, the field of evaluation offers AI practitioners a particular kind of logic and a set of tools in which to apply AI in different settings and for different purposes. This blending of approaches takes place because many forms of evaluation share a set of core values with AI such as participation, utility and empowerment.

While OD practitioners have been experimenting with new approaches and processes for facilitating organizational change, many evaluators have been searching for more effective tools and strategies for facilitating learning from evaluation. Over the last 25 years, the evaluation profession has grown in its scope and boundaries. As described by Russ-Eft and Preskill (2001), “Evaluation has grown from being monolithic in its definition and methods, to being highly pluralistic. It now embraces multiple methods, measures, criteria, perspectives, audiences and interests.” (p.46). Some of these evaluation approaches include participatory evaluation (Cousins & Earl, 1992), utilization-focused evaluation (Patton, 1997), empowerment evaluation (Fetterman, 2000), democratic evaluation (Greene, 2000; House & Howe, 1999) and fourth generation evaluation (Guba & Lincoln, 1989), the last of which is explicitly based on the assumptions of social constructionism. Although these different forms of evaluation may serve different purposes, they share many of the same principles and aspirations as Appreciative Inquiry.

Ultimately, evaluation and AI are both concerned with asking questions about issues that arise out of everyday practice. At its most basic, to evaluate means “to determine the value, quality, or significance of” (Steinmetz, 1993, p. 225). In addition, the following elements are commonly found in other definitions of evaluation (Patton, 1997; Preskill & Torres, 1999; Scriven, 1991):

- Evaluation is a systematic process.
- Evaluation is a planned and purposeful activity.
- Evaluation involves collecting data regarding questions or issues about society in general and organizations and programs in particular.
- Evaluation is a process for enhancing knowledge and decision-making, whether the decisions are related to improving or refining a program, process, product, system or organization, or for determining whether or not to continue or expand a program.
- Evaluation involves some aspect of judgment about the merit, worth or value of what is being evaluated.

There is great value that each field can bring to the other. Thus we believe that a deeper understanding of and respect for the basic principles of each field is important in order to bring these two disciplines together. Individually, Appreciative Inquiry and evaluation have much to contribute to organizational effectiveness. Together, they can help organizations use creative and rigorous methods to build on the best of the past to create a desired future. The field of evaluation has begun to welcome Appreciative Inquiry for its power of reframing and for its highly participatory processes. The field of AI is increasingly exploring the contributions of evaluation to organizational life, the tools and processes it offers for reflection and learning, and its commitment to utility by client and stakeholder groups of its findings, results, and processes.

The articles featured in this AIP issue showcase some effective practices for combining rigorous evaluation methodologies with the asset-based and dialogue processes of AI. In the first article, *Using Appreciative Inquiry in Evaluation of Training Programs: World Bank Institute*, Tessie Tzavaras Catsambas describes how AI was used to develop an evaluation plan or methodology, including the overall approach and focus, indicators and data collection instruments, for two training programs. In the next article, *An Application of Appreciative*

*Inquiry to Evaluation: Discovering Student Learning Outcomes and Program Strategies*, Thomas Grayson explains how a university career center used AI to create a culture of evaluative thinking and affirmative evidence to improve programming and services. More specifically, this case shows how the affirmative inquiry topic of “Incredible Student Outcomes” led to a better understanding of the programs and services needed to achieve those outcomes.

Kotellos, Rockey and Tahmassebi in *Using Appreciative Inquiry to Evaluate an Appreciative Inquiry Process: Evergreen Cove Holistic Learning Center*, describe how an appreciative evaluation methodology was used to assess the impact of a full Appreciative Inquiry process in the context of an organization and community. Specifically, this case examines how elements of AI were incorporated successfully into an evaluation that assessed the results of an AI change process. Margaret Clawson in *Using AI to Modify an Evaluation Plan in a Rural HIV Care Clinic* shows how AI was used to incorporate HIV clients’ voices in the visioning and planning of a rural clinic and, subsequently, in modifying the evaluation plan of the clinic’s training program. In the last article, *Using AI to Develop a Training Evaluation System*, Preskill, Dudeck and Portzline take a more macro view of evaluation. These authors describe in practical detail how AI was used to develop an overall evaluation system that provides valid, useful and ongoing evaluative information.<sup>i</sup> Anne Radford completes this issue with her Viewpoint, *Measuring Results through Storytelling*.

These cases demonstrate that when AI methods are incorporated into evaluation, the results add significant and lasting value for organizational effectiveness, beyond the scope of what either discipline alone can accomplish. The common themes that emerge from these articles show that AI and evaluation together can:

- Lessen the fear and skepticism many managers have about evaluation by focusing on successes and best experiences
- Help organizations become learning systems with a focus on building onto the best of what is
  - Engage the whole system in the evaluation process, thereby ensuring more comprehensive evaluation results
  - Create buy-in to the changes recommended through the evaluation process which may lead to increased decision making and action
  - Build organization members’ capacity for thinking evaluatively and engaging in more evaluations
  - Garner important programmatic information that can be used to develop more meaningful evaluation plans or designs

This issue of the AI Practitioner honors both fields through case studies that demonstrate how practitioners have drawn from both AI and evaluation to make a constructive difference in their clients’ organizations and lives.

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*Guest editors, February 2005*

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<sup>i</sup> In these articles, some of the authors use the AI 4-D (Discovery, Dream, Design and Destiny) model and others describe using the 4-I (Initiate, Inquire, Imagine and Innovate) model. Although these models are similar, please see Watkins and Mohr (2001) for a description of the finer differences.

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Joep de Jong, Director eLearning Solutions, BT (5 July)

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