



Tim Slack

had a 30-year career in the UK public and voluntary sector, in the fields of community development, urban regeneration and European economic programmes. In May 2006 he set up Appreciating People, based in Liverpool, which specialises in strength-based work and whole system change.

Contact: tim@appreciatingpeople.co.uk
www.appreciatingpeople.co.uk



Learning from the Military

Developing an AI-based Project Debrief Toolkit

ABSTRACT

In calling for end-of-project impact assessments, the author was seen as putting forward ideas that were too bold for some. However, by 2006, with his knowledge of military history and Appreciative Inquiry, and his experience of urban regeneration projects, these challenges had been overcome and debrief project meetings were being welcomed as a different way of approaching project evaluation and development. This is the story of how the Project Debrief toolkit, its basic principles and core elements were developed.

Background

In 2004, my experience of community and regional inner city partnership regeneration projects led to an awareness that impact assessments took place a long time after the project's delivery and focussed only on the funders' requirements. The human stories – the partners' experiences and the practical lessons for future development – were all missing. At the development stage projects emphasised creating partnership protocols or ensuring that operating systems and responsibilities were agreed. There was little consideration at the end of the project of what had happened, whether the devised system had been effective, and the original project aims met.

In developing a more inclusive approach to debriefing projects, I have drawn on my professional career developing and delivering UK regeneration and EU-funded economic regeneration programmes, and an abiding fascination with military history, in particular its human experience, and emphasis on 'learning from history'. More recently, Appreciative Inquiry, and its focus on working from strengths, doing more of 'what works' and emphasis on 'whole system in the room' has made a major contribution to my thinking and practice.

Military influences

Much has been written in management books and management theory about learning from military experience. In emphasising leadership and the macho organisation culture, some of the golden nuggets in human organisation and culture have been overlooked, particularly:

- !The emphasis on operational intelligence – the study of what advances and changes the enemy is using and what methods and changes front line operations are using

This project debrief toolkit is designed to improve practice, capture stories and successes, and take the learning gained.

- !The understanding of mission creep – when the original military mission aims and objectives get changed and expanded so that often the end of the mission bears no resemblance to the original plan (as happened in Vietnam and the Iraq war)
- !Mission debrief – which is built into the military operational experience and occurs at the end of any form of operational duty when the participants meet to reflect and then act on the experience

The philosophy and approach of Appreciative Inquiry (AI) provides a method and framework for identifying inspirational stories, understanding what has worked, and the learnings for future development. Prior to using AI, debriefing projects experience indicated that:

- !Participants often operated in a blame culture and concentrated on what did not work. They struggled with taking responsibility for their actions, were defensive of their own organisations, and found it difficult to look at the process and experience in a non-judgemental way.
- !There were very different partner views and understanding of projects which led to confusion, 'project creep' and different project objectives.
- !It was difficult to gather all the players together for any kind of review – often participants were reluctant to take part.

In 2004, whilst working at Groundwork (an environment charity based in Merseyside, UK), an opportunity arose to develop a new approach to debriefing a project. The approach was honed on a number of internal and external projects, leading to the production of a 'debrief toolkit'.

The project debrief toolkit

This project debrief toolkit is designed to improve practice, capture stories and successes of a project or programme, do more of 'what works' and take the learning gained from the project experience into future development and delivery. The toolkit is not a static instrument but a model that can be extended and developed through use and experience. In the spirit of AI, the toolkit is a gift to the AI community with no copyright. It can be used freely with the request that Appreciating People is referenced as its originator.

In late 2005, Appreciative Inquiry was integrated into the project debrief process by using strength-based questions and an emphasis on doing more of 'what works'. From mid 2008, AI interviews were integrated into a three-stage debrief process, and SOAR (Strengths, Opportunities, Aspirations and Results) was included in the second stage. SOAR applies AI principles to strategic analysis and is being used by many people instead of SWOT (Strengths, Weaknesses, Opportunities and Threats). With SWOT there is a tendency to concentrate on weaknesses and threats, whereas SOAR is based on what is working, is aspirational and creative.

Example

A health-related volunteers project involving Groundwork Merseyside, St Helens Council of Voluntary Service and St Helens Health Action Zone:

A debrief session considering the effectiveness and further development requirements of the project had shared powerful stories of participants' successes, and the common values of the work being undertaken. In a short timeframe participants set out and agreed the development plan for the next two years. Overall the process was a powerful and effective learning, and strengthened partners' commitment to further joint working and led to further funding for a more robust project.

Description of Appreciating People project debrief toolkit

The most effective model is a three-stage process:

- !AI interviews (participants are asked either to conduct interviews before the debrief session or are interviewed within the session)
- !A project workshop (with all partners and participants)
- !A report or briefing note

The core elements of the project debrief process are:

- !To consider the successes and achievements of a piece of work, a project or a programme
- !To gather the stories of the people and organisations involved in the process
- !To explore and agree the learning from the project/programme and how it could contribute to improving performance and future development
- !To provide information and facilitate actions based on strengths and 'what works', that can progress a project and plan its future in a more creative and aspirational way

Participants

The 'whole system' guidelines of Marvin Weisbord and Sandra Janoff suggest the people to include. They recommend inviting people who have:

- !Authority to act (e.g. decision making responsibility in an organisation or community)
- !Resources such as contacts, time or money
- !Expertise in the issues to be considered
- !Information about the topic that no others have
- !Need to be involved because they will be affected by the outcome and can speak to the consequences

Ground rules

- !Work from the strengths and positives arising from the project
- !Concentrate on the learning to be gained, in particular from the challenges and difficulties
- !Organisational or individual blame is not apportioned
- !Use an appreciative eye and creative approach to the process

- !Listen and reflect on the contributions being made
- !Stay in 'relationship' rather than 'role' or 'organisation representative'
- !Always consider how the experience can contribute to future development

Debrief workshop

Participants are drawn from the stakeholders or/and clients involved in the project and sessions are ideally led by a facilitator who has not been involved in the project.

The format should be a combination of short individual AI-based interviews followed by group discussion using exercises, interviews and storytelling. At the beginning of the process, it can be helpful to set up an Issues and Challenges Wall where participants are asked to place any issues and concerns. This can be added to throughout the process and at the end of the session the facilitator checks to see whether the issues have been covered. (Frequent use of this exercise by the author seems to indicate that just recording the issue gets the matter in the space and requires no further action. The process always seems to bring the matters to the fore but within a strength-based context.)

At the beginning of the session, the facilitator sets out the ground rules, explains the session format, the Issues Wall and facilitates participant introductions. In some cases an explanation of the Appreciative Inquiry approach and the 5-D cycle may be required.

Definition

Participants are then asked to do the following:

Task 1: Write down on a post-it note what you think the project/programme was about and on a second post-it note write down the key outputs/outcomes.

Task 2: Share the content of the post-it notes and see if there is common agreement.

Discovery

Through paired interviews, answer and discuss the questions below. Key themes are recorded on post-it notes placed on flipcharts and are either clustered together or put into themes. (There can be some advantage in asking all participants to answer question 1 individually and with no interruptions.)

Q1: Reflecting back on the experience of the project/event, what do you feel have been the most positive outcomes of the project?

Q2: Can you tell the story of the most positive experience you have had being involved in the project/event?

Q3: Can you share the best and most rewarding moment a participant has had in the project so far?

Q4: Which parts of the project are working or have worked well and why?

The group is asked, through discussion and building on 'what works', to create the dream.

Stories and themes are shared and, where possible, recorded to share with a wider group or to include in a report.

Dream

The group is asked, through discussion and building on 'what works', to create the dream:

Q5: You have visioned forward three years – what will the project look like and be composed of, and what would have been its impact?

Design

The group (or in pairs) discuss the questions below and produce one statement (the provocative proposition) that can identify what needs to happen and the themes that to be addressed.

Q6: What actions would you take to make the project/event perform better and/or achieve more and what will you do to help?

Delivery

In this final stage the group reviews the process so far and discusses the question below. From discussion the group then sets out what it needs to do next. This may include re-defining the inquiry and going back into the debrief process.

Q7: The facilitator seeks common ground for the next stage and asks each participant to share the one action they are going to do and what they have enjoyed about the session. The group also looks at the Issues Wall to see if all the matters have been addressed.

The experience so far

Over the last few years a number of Project Debrief sessions have been held, providing more effective and realistic project design and development, less project creep, more honesty and openness, improvements in stakeholder and partnership relationships, more creative solutions and strategic development, and a better understanding of what happened in the project (without feeling threatened). People who have been part of the debrief process have used elements in their work and found it a positive and strengthening experience.

References and resources used in this toolkit

Kline, Nancy. (1998) *Time to Think: Listening to Ignite the Human Mind*. Cassell Illustrated

Weisbord, Marvin and Janoff, Sandra. (2007) *Don't Just Do something, Stand There! Ten Principles for Leading Meetings that Matter*. Berrett-Koehler Publishers Inc.

Magruder Watkins, Jane and Mohr, Bernard J. (2001) *Appreciative Inquiry: Change at the Speed of Imagination*. Jossey-Bass/Pfeiffer

Stavros, J., Cooperrider, D., and Kelley, L. (November, 2003) 'Strategic Inquiry with Appreciative Intent: Inspiration to SOAR,' *AI Practitioner*, pp10-17 www.aipractitioner.com

International Journal of Appreciative Inquiry

Inside:

- 4** Introduction by Julie Barnes and Anne Radford
We are currently excited by ideas of boldness and are inspired by the bold stories we are presenting here.
- 7** **Part 1: New Models, New Ways, New Places**
A New Business Model: An Insider's Guide by Anne Radford
Anne Radford interviews David Gilmour and Joep C. de Jong.
- 11** Safeguarding Children: a Compelling New Model by Lesley Moore and Julie Barnes
This is a story about an important idea – using AI to learn about what works in safeguarding children – and acting on it.
- 15** From Scrutiny to Appreciative Inquiry: Shifting Culture and Practice in Adoption and Fostering Panels by Liz Martins
The culture of spotting what is wrong is ingrained in the adoption and fostering panel world. This article describes work that promotes an alternative model with practical strategies.
- 19** Taking Appreciative Inquiry Boldly into the World of Adult Social Care by Carolyn Caldwell and Angela Hayes
Social care for adults is undergoing a radical transformation in England.
- 24** Creating a Vision for an Appreciative Future with West Midlands Fire Service by Steve Loraine
The West Midlands Fire Service adopted AI when creating a vision for their service for 2013.
- 28** Imagine St Helens – Town-wide Appreciative Boldness by Ann Shacklady-Smith
How does a community-led organisation relying on volunteer time secure a genuine community voice?
- 32** **Part 2: Unfolding Destinies**
Leaders Going Boldly Forward by Wendy Briner and Eunice Aquilina
'We wanted to discover leaders' stories of boldness.'
- 39** Learning from the Military: Developing an AI-based Project Debrief Toolkit by Tim Slack
AI, military history and experience of urban regeneration projects contributed to the development of the Project debrief toolkit.

International Journal of Appreciative Inquiry

Inside continued:

- 44** Out-SMART and AI: Connecting, Reflecting and Team building through mini-adventures by Paul Dearlove
The Out-SMART course is about creating solutions through a series of mini-adventures.
- 48** A Big Conversation...a Client's First Impressions of Working with Appreciative Inquiry by Sharon Sephton
The Big Conversation: the future of health, arts and well-being in Liverpool.
- 49** A Wordle by Jo Tait
Jo's connection with Appreciative Inquiry expressed as a 'word cloud'.
- 50** At the Speed of the Imagination ... from Coaching to Applying AI in Six Ways in as Many Months! by Margaret Wright
People get to the point where they have done the reading and want to apply it.
- 53** Impact on Professional Lives, a Church and Plastics Factory: A Bold AI Journey by Roger Wythe
Three examples of boldly applying Appreciative Inquiry in different contexts.
- 56** What Does It Take to Transform a Nation? by Lena Holmberg
Imagine using our AI network to transform the region or country where we live.

-
- 58** **AI Research Notes**
by Jan Reed and Lena Holmberg
Research Notes carries news of AI research which is about to start, is in progress or has been completed. Contributions are from researchers around the world.

-
- 63** **About the May 2009 Issue**
Intergenerational Dialogue edited by Joyce Lemke, Marjorie Schiller and Peter Whitehouse
The guest editors of the May 2009 issue invite practitioners to think about intergenerational conversations, and their power and merit.

- 64** **AIP World Contacts and AI Practitioner Subscription Information**



AIP World Contacts and AI Practitioner Subscription Information



Australia

Sue James info@bjseminars.com.au

Liz Mellish info@mellish.com.au

Canada

Western Gervase Bushe bushe@sfu.ca

Toronto Maureen McKenna maureenmckenna@sympatico.ca

Winnipeg Joyce Rankin jrankin39@shaw.ca

Colombia

Sara Inés Gómez sarinagom@cable.net.co

Denmark

Charlotte Dalsgaard cd@harbohus.dk

Mette Jacobsgaard 101572.622@compuserve.com

Henrik Kongsbak henrik@resonans.dk

Germany

Southern Germany Walter Bruck contact@wb-consult.de

Northern Germany Christoph Beck info@tricon-beratung.de

Dorothe Liebig dorothe.liebig@t-online.de

Hong Kong

Catriona Rogers c.rogers@re-authoringlives.com

Italy

Yvonne Bonner y.bonner@re.nettuno.it

Scotland

Margaret Wright mwright@resolution-scotland.com

South Africa

Bridget Woods bridget@fireglow.co.za

Sweden

Sven Sandstrom and Lisen Kebbe sven@kebbe.se

The Netherlands

Joep de Jong joepc@mac.com

Maarten Thissen maarten@djehoty.com

USA

East Coast Marge Schiller margeschiller@yahoo.com

West Coast Steve Cato scato1@centurytel.net

AI Practitioner Editor/Publisher

The editor/publisher is Anne Radford. She is based in London and can be reached at editor@aipractitioner.com.

The postal address for the publication is:

303 Bankside Lofts, 65 Hopton Street, London SE1 9JL, England.

Telephone: +44 (0)20 7633 9630

Fax: +44 (0)20 7633 9670

ISSN 1741 8224

AI Practitioner © 2009 Anne Radford

 [Back to Table of Contents](#)

Subscriptions for Individuals

For auto-renewal of individual subscriptions, go to

<http://www.aipractitioner.com/NewShop/newsub.htm>

For one year fixed individual *AI Practitioner* subscription, go to

<http://www.aipractitioner.com/NewShop/newsub.htm>

NGOS, students and community groups have a special

purchase rate, go to

<http://www.aipractitioner.com/NewShop/newsubstu.htm>

Subscriptions for Organisations

Small organisations and university classes: for group rate, go to

<http://www.aipractitioner.com/NewShop/newsubsmall.htm>

Large organisations giving access to AIP through a password-

controlled site: for corporate licence, go to

<http://www.aipractitioner.com/NewShop/newsubcorp.htm>

Back Issues

Issues 1 to 11 can be downloaded free of charge. There is an

index of issues at www.aipractitioner.com/aipractitioner.htm

Single copies of Issue 12 onward can be purchased at the secure shop at

<http://www.aipractitioner.com/NewShop/aiprac.htm>

Change of subscriber email address

Send the old and the new addresses to

editor@aipractitioner.com with 'Change of address' in the subject line.

Publication Advertising/Sponsorship

For the advertising rates, contact Anne Radford.

Please Note Views and opinions of the writers do not necessarily reflect those of the publisher. Every effort is made to ensure accuracy but all details are subject to alteration. No responsibility can be accepted for any inaccuracies.

Purpose of AI Practitioner

This publication is for people interested in making the world a better place using positive relational approaches to change such as Appreciative Inquiry.

The publication is distributed quarterly: February, May, August and November.

