

An Appreciative Approach to Strategic Planning

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Abstract

This article explores the use of Appreciative Inquiry (AI) as a tool to support transformational change in higher education. By reframing the planning process and engaging colleagues in positive dialogue, York University's experiences showcase that AI can achieve more than traditional strategic planning initiatives, by driving sustainable and meaningful progress within organizations.

Keywords

Appreciative Inquiry, Appreciative Advising, student advising, higher education

How often do higher education institutions initiate a strategic planning process to “fix” problems which, instead of energizing constituents, leaves them feeling bitter and uninspired? Prior negative experiences with strategic planning initiatives designed to fix issues may well explain the resistance I encountered from my advising colleagues when I invited them to engage in a strategic planning process to improve advising. They quickly told me their past experiences with a deficit-based approach to strategic planning did not resonate with them, and that they did not have time to create a document that would result in a plan that did not reflect their feedback and suggestions, and never seemed to generate actual changes or improvements. Given this resistance, I knew I needed to employ a different approach to strategic planning – one founded in care, built on the strengths of our advising community, and that would result in a document that would excite and inspire our community. The purpose of this article is to share the story of how we took an appreciative approach to creating a framework to guide advising efforts at York University.

Background

Having worked in Advising at York for over a decade, I knew we did not need a *new* plan to “fix” advising. Instead, we needed to establish a structure that would underpin and strengthen our existing advising system that had already served thousands of students well. I wanted to move away from continuously analyzing “pain points” and instead focus on the positives to create something less rigid and sterile than a “Strategic Plan.” Instead, I sought to create a living document that would promote intentionality and consistency across all services, and that would consider a more holistic approach to advising students. Seeking to formalize our “ways of working” we needed to capture our commitments to each other and to our students into a document, a document that we later called an Advising Framework (Student Advising at York, 2023).

As I began planning a retreat to co-create the Framework with my advising colleagues, I spoke to the co-founder of Appreciative Advising, Dr. Jennifer Bloom (Bloom & Martin, 2002; Bloom et al., 2008), who suggested I consider hosting an Appreciative

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Inquiry (AI) summit to guide our strategic planning work. An AI summit (Whitney & Cooperrider, 2007) is a tool used by Appreciative Inquiry practitioners to bring people together to engage participants in co-creating a preferred future for organizations. As I read Stavros et al.'s (2015) book, I quickly realized that Appreciative Inquiry would seamlessly align with our goals, given its inclusive nature and positive focus. An added bonus was that we had already been embedding Appreciative Advising (Bloom et al., 2008) into our institutional approach, so using Appreciative Inquiry was a natural fit to support our transformative efforts. As Stavros et al. (2015) stated, "At its heart, AI is about the search for the best in people, their organizations, and the strengths-filled, opportunity-rich world around them" (p. 97).

Appreciative Inquiry would allow us to build on the successes that we, as an advising community, had already achieved. For example, we had defined *academic advising* as a professional practice and had created a Community of Practice that regularly brought colleagues together to share ideas and concerns. An internally created competency framework defined our professional development needs, outlining the knowledge, skills, and attitudes that drove our practice. We then reinforced all of this framework with technology that allowed us to share notes, improve communication, collaboration and efficiency between teams, promote consistency in practice, and serve as an institutional memory of advising contacts and recommended actions.

The Summit

Our advisors were already helping our students reach their full potential and empowering them by asking Appreciative Advising questions. Over 60 advisors completed the Appreciative Advising Online Course at Florida Atlantic University (Florida Atlantic University, n.d.), and we developed in-house virtual development offerings and associated resources to continue to support our colleagues. What we needed to do next was to center the student experience in our efforts and ask ourselves how we could "magnify and engage this positive core with constructive, transformational intent" (Stavros et al., 2017, p. 97). We realized that we not only needed to think more broadly about all the offices across our multiple campuses that provided students with advising services: Academic, Records & Financial Aid, Immigration, Career and even Varsity Student Athlete Advising, but we also needed to bring this diverse array of student-facing offices together in conversation. To do so, we decided to replace our annual internal advising conference with an Appreciative Inquiry Summit where colleagues across the institution met to focus on the first three phases of the AI Model: Define, Discover, and Dream. The Summit was our opportunity to not only build and renew relationships across the continuum of advising, but also to liberate our ideas and opinions – as a team. Leveraging our annual Conference and having all the voices in the room at the outset helped to overcome the resistance and skepticism typically associated with "Strategic Planning" initiatives, where a call is put out, multiple committees are struck, meetings are held, a plan is created and then presented to the Community as a *fait-accomplie*. We chose the "SOAR" (Strengths, Opportunities, Aspirations and Results) approach (Stavros & Hinrichs, 2009), as opposed to focusing on Weaknesses and Threats (**SWOT**) (Humphrey, 2005), spending a full day asking ourselves generative questions to discover the best of who we are and who we wanted to become. We tapped into the stories, knowledge, and wisdom of over 100 colleagues across the institution to discover our strengths (values) and then shifted our sights to the possibilities before us to co-author and define our future.

In the Define and Discover phases, we initiated our discussion in pairs, asking ourselves two questions: 1. *Tell your partner about a time one of your colleagues did something really inspiring. What did that look like?* 2. *Tell your partner about a time when a*

colleague went above and beyond in their care for a student/in their care for another member of their team. What did that look like? We then shared back to larger table groups, where designated notetakers began jotting down key themes on giant sticky notes. Once this step was done, we used Mentimeter (<https://www.mentimeter.com>) to showcase everyone's thoughts on a large screen, by creating a word cloud that surfaced key values. This exercise clearly demonstrated that we had a shared purpose and passion. The values that came up time and time again created a roadmap to guide us in our decision-making and was the perfect way to set the stage to Dream, where we considered our future-selves. During this exercise, we asked ourselves: *Fast forward 10 years into the future. York has won a national award for having the most student-centered advising. What does this look like?* In the first half of the activity table groups were tasked with creating a vision of the future, using words, phrases, and drawings. In the second half of the activity, they transformed the collection into draft mission statements, which were put up around the room and voted upon during a gallery walk. A working group, whose task it was to convert all the rich Summit materials (words, phrases, drawings, quotes) into a formal document where we captured our vision, mission, values, commitments, and priorities, took on the Design phase. After months of work, and once we had our draft, we proceeded to validate it across the University during a Community Roadshow. We visited our 11 faculty advising units, 7 partner units, as well as Senior Management Committees and our Student Advisory Committee, with over 100 colleagues having the opportunity to provide their thoughts in person and via our follow-up survey.

The feedback we received both from the Summit and the Roadshow was resoundingly positive – our advising colleagues saw themselves reflected in our Framework. They felt the Framework itself was reflective of the priorities of the community, and that the Framework was achievable, with 100% of survey respondents indicating that our vision, mission, values, and commitments resonated with them. I do not feel we would have been as successful, had we not started with everyone's voices “in the room” by leveraging the Appreciative Inquiry Summit as a starting point. In fact, one of our respondents specifically stated that they were *impressed by the community building and collaboration used throughout the process*. The Advising Framework was truly co-created – we had the trust of Senior Leadership and the voices of colleagues across the University. Since we initiated this work, we have been able to live up to our commitments by expanding our Community of Practice to all student advising areas across our multiple campuses, launching an intranet to provide resources for advising colleagues across the institution and reframing our student-facing website to be reflective of the full spectrum of advising services. We have even run institutional “pop up” advising fairs, and plan to continue to develop such resources, programming, and events as part of our commitments to each other and to our students.

Closing Thoughts

I am not arguing that strategic planning is inherently problematic, but rather, that a strengths-based approach is much more fruitful for organizations seeking to provide some more formal structure to often siloed services. Appreciative Inquiry is an incredibly powerful tool that allows advisors across an institution to dream – and this dreaming translates into the laying of a strong foundation and the building of sustainable institutional advising models. For anyone considering alternative approaches to strategic planning, I encourage you to explore the benefits of taking an appreciative approach. Focusing on the positives will most certainly promote engagement and energize your teams, and this may well be just what you need to promote a transformative shift. There is nothing better than to create a *shared* vision for the future – one in which colleagues across your institution have had a chance to contribute, for this shared vision partnered with collective strengths is exactly what will drive meaningful and lasting change.

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