

Using Whatever Emerged: Infusing AI through the Contracting Process

Lonnie Weiss

lonnie@weissconsultinginc.com

This story highlights how partnership, flexibility and opportunism—in the best possible way—allowed us to build momentum and begin infusing AI even before the initiative began. Although top leadership support was unwavering, the contracting process at a large state agency took many months. At every step we embodied an appreciative stance and used AI to “plan the plan.”

Background

In 2005 I led a project to infuse and embed Appreciative Inquiry in a large public agency. The New Jersey Department of Human Services (the “Department”) is the state’s largest cabinet-level agency. It encompasses twelve divisions, 25,000 employees, and an annual budget of \$10 billion. The Department serves one million people daily, including abused and neglected children, troubled youth and families, people living in poverty, residents who are mentally ill, developmentally or physically disabled, and those addicted to drugs or alcohol. The Department’s Commissioner, James M. Davy, took office during a period of intense and extended trauma for the agency that involved several highly public failures in its child welfare system. Department employees were distressed and the press and the public alarmed.

Jim recognized that in addition to making system improvements, the staff needed support. He had read about Appreciative Inquiry and knew it would focus on strengths and provide an antidote for the demoralized culture. The critical situation begged for a quick start. At the same time, Jim was attuned to the realities of politics and public opinion. An election was coming up and his administration was expected to have a short tenure. He was committed to leave a legacy of support for the staff but suspected the state’s contracting entities would reject Appreciative Inquiry because of its novelty. He imagined the hue and cry if people thought tax dollars were going into this internally focused AI work “instead of” directly helping clients. Yet he believed AI was crucial, so he sought and secured funding from an independent foundation. In a private sector demonstration of support, a philanthropic contribution to strengthen the Department’s leadership development infrastructure was allocated to this initiative.

The intricacies of funding and contracting delayed the initiative by several months. In the interim I used AI wherever I could. This article describes the activities and strategies that preceded the full intervention and helped to make it possible.

Establishing Our Partnership

During my first meeting with the Commissioner and a handful of his top staff, we talked

about appreciative methods and philosophy and how they are in synch with his beliefs. I had prepared an appreciative question: “You’ve chosen the challenges of public service from many work opportunities. What’s one memory that captures the pride and deep satisfaction you get from working in this sector?” I posed the question in an impromptu demonstration of appreciative inquiring, and while everyone reflected on their responses, Jim’s closest advisor spoke up. I interviewed him and he opened up to me with his deeply held values about public service. We all recognized this as a moment of true connection and saw the potentially great impact of embedding AI Department-wide. From that first hour, we were allies in the commitment to bring the benefits of AI and positive change to all Departmental employees.

Expanding a Positive Inclination

Jim resonated with AI immediately. “AI solidified for me how I’d operated for years,” he told me. Jim views people as sacred beings. And he is a natural storyteller. In speaking engagements across the state, he was already sharing heart-full stories of staff members’ courage and caring commitment. Jim’s instinct to spread success stories was reinforced by the theoretical support of AI principles.

His own commitment to his Department’s people, sustainable solutions, and an appreciative approach was unwavering. He said, “I wanted to bring a sense of appreciation and support to the workforce.” He was a congruent, inspiring leader and partner.

Embodying an Appreciative Stance

I was entering a system that by its nature is not appreciative, and encountered people who approached the world from a different style. I worked hard at holding and conveying an appreciative stance. Giving people a direct experience of appreciative communication proved to be a powerful infusion technique. Jim told me that my use of AI methods and assumptions had a real impact on him and others. He said they responded to me and found me easy to engage with, “calm and calming.”

Together with my consulting partners Nancy Aronson and Jill Golde, we developed a pattern of mutually supportive communication that helped us respond levelly to the challenges and not take them personally. Even before my first meeting with the Commissioner I used our local AI practitioner community (“the Broccoli Alliance”) to help me plan my approach. They helped me develop options for the intervention and supported me in maintaining my balance and appreciative stance when the negotiations were most challenging.

Extending Partnership with Others

Given the desire to get started, I began using whatever opportunities came up to insert an appreciative twist into ongoing work. I collaborated with other external consultants in their projects. For example, in October 2004, at the Commissioner’s request, I joined consultants who were to lead an Open Space event for the Department’s top 250 managers. These consultants graciously welcomed my guidance in focusing the event appreciatively. I designed and led a session for twenty departmental managers using AI discovery questions,

paired interviews and topic identification. The combined consulting team then met with the Commissioner and a few key executives to review this appreciatively discovered topic input. They used it to create the focal theme for the open space event: “transcending crisis and making the cross-divisional excellence they demonstrate under fire a way of life across the Department.” In a second instance of extending partnership, I encouraged Jim and his top leadership group to attend a two-day introductory AI class being taught nearby. This oriented 26 of the Department’s top 35 managers to AI and created some genuine interest in this approach.

Exploiting Opportunities

One of the executives who attended the AI workshop directed a division serving persons with developmental disabilities. She was about to launch the citizen advisory group for a new federally funded project within her division. Knowing that group members had years of history working together—and not always smoothly or trustingly—she took a chance on AI. She brought me in to design and lead a half-day “Envisioning Session.” I used appreciative discovery and dreaming to help the group recall the positive core of their commitment to the issue, their values, and their shared visions. Several managers from other divisions, including the Department’s quality management function, participated in the session and got yet another taste of AI and its applications, which helped build further acceptance for AI.

Evolving a Flexible Approach

Originally my team and I proposed an “incubator” model to introduce AI, a project- and practice-based approach to spread AI through many divisions at once with minimal instruction. As I listened more deeply, I heard my clients’ focus on building internal capacity and their preference for a “train the trainer” model to create self-reliance and sustainability within the organization.

We responded by rethinking our approach. It took many rounds of pre-contract negotiation to ensure our design would embed AI capacity within the Department’s career employees. At every step of shaping the project, we used AI to plan the plan. The ways we communicated and our commitment to what worked were living expressions of appreciative principles, and were recognized as a model of AI at work.

Ultimately a few Departmental managers, my consulting team and I co-created a Departmentally-appropriate AI intervention. In addition to my subcontract work with the Open Space consultants and my small contract for the divisional Envisioning Session, we contracted for a major AI training and technical assistance contract over an eight-month period. This incorporated key training elements the client required while preserving core application aspects of our original proposal.

We trained a cadre of 65 mid-level staff as AI practitioners and internal consultants, and provided technical assistance to a dozen of their AI projects. When we saw special needs emerging for several teams, we developed half-day sessions on topics such as leading summits.

A core team of leaders at the Departmental and divisional levels was created for guidance and integration; they met at intervals throughout the intervention. However, the strongest

leadership was emergent. The middle levels of the agency, the cadre of AI-trained career employees and the human resources team, are where AI became truly embedded.

Expecting Contentious Issues

The full intervention, and the process leading up to it, was entirely about dealing with contentious issues. Fundamentally, this Department's business is to serve people experiencing some of the most intense, severe, and negative challenges in our society. Further, their child welfare division was being supervised and monitored by a federal judge and was under attack in the court of public opinion. The institution and its people were beleaguered and poised for the next blow. Counteracting trauma was the very impetus for the Commissioner's decision to introduce AI. So, what did we do?

- We consistently communicated an attitude of acceptance and optimism. This set the tone and proved attractive to many of the people we trained and supported.
- We assumed we would find resistance among those we trained, and they would find resistance taking AI into their workplaces. During contracting, we jointly shaped the training to include skills in handling resistance. And we successfully integrated Barry Oshry's model of organizational worlds (*Seeing Systems*) as a tool for appreciative reframing.
- We worked with those who chose to show up and engage with us, and did not worry about those who did not. That implicit empowerment message proved to be one of the most significant things people took from our approach. It said that their participation mattered.
- We anticipated that technical assistance would be focused where needed and not evenly distributed: the range was from one-half to six or more days per division. We provided extensive support to one of the most volatile divisions, supported that project team and shadowed the Department's human resources professionals, who quickly took the lead in facilitating the series of summits. Eventually over 90% of that division's staff participated in a two-day summit that built esteem and camaraderie while generating improvement priorities. Word spread that this was real and good; this was a huge breakthrough in gaining acceptability for AI Department wide.

Post Script

Ironically—or maybe not so surprisingly—the Department's strong negative environment may have contributed to making the appreciative approach attractive, desirable, and welcome. During pre-contract work I embodied an appreciative stance by not insisting on being in the lead, partnering with my client, and taking whatever opportunities arose. Repeated exposure and direct experience with an appreciative approach helped nurture people's willingness to trust and try AI. Those experiences included interactions with me, participation in a series of small events, and the Commissioner's committed and congruent modeling of AI.

In the six months after formally introducing AI in the Department, 65 people were trained and 2000 people—10% of the full time staff!—were touched directly by AI projects. The human resources professionals developed deep expertise in appreciative methods and principles and are consulting and training internally using AI. Many top managers are gone now in the new administration, but AI leadership and understanding remain embedded in the cadre of mid-level leaders.