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*'Let Us Now Praise Famous Men?'*¹

Is appreciative inquiry helpful in researching board member exit?

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Abstract

The research and practice theme of nonprofit board members' exit is considered , through interviews with board members who have left their boards during organisational crisis or transition. Building on our earlier work, this paper explores the extent to which the research philosophy and approach of appreciative inquiry (AI) is helpful in gaining understanding of the opportunities for organizational and personal learning in these demanding circumstances. Using a purposive sampling approach, four organisation vignette- cases provide the context for conversational interviews where an AI inquiry framework is used. With a limited number of themes emerging from these interviews, we report our difficulties in keeping within the AI paradigm, and the ways in which negative accounts of board exit appeared to over-ride the case for this 'scholarship of the positive'. The importance of continuing to extend understanding of board members' exit and the learning implications for voluntary and community organisations is however stressed.

¹ *Ecclesiasticus, chapter 44, verse 1*

Introduction and research rationale

The departure of members from nonprofit boards remains a minimally researched area. With its emphasis on boards' recruitment, retention and effectiveness, the literature on the *severance* of key relationships in nonprofits remains sparse. Yet work on changing styles of volunteering, emphasising "frequent entries and withdrawals" from volunteer activity and flexibility based on "biographical whims" (Hustynx and Lammertyn, 2003) suggests that such departures have become a central element in nonprofit organisational life; if not yet examined in detail in board settings. At the same time, governmental encouragement of volunteering (including board volunteering) continues to be strongly signalled . Moreover, in the UK governmental policy supports the idea of nonprofit merger ,(Charity Commission, 2004), a major occasion of board member exit. Further, the growth of nonprofit-governmental partnerships (Brinkerhoff,2002) has led to hybrid boards' development, and thus yet more competitors for the would-be board volunteer's commitment and effort. (Johnson, 2005).

In earlier work, we have begun to redress this balance by exploring the issue of knowledge capture from trustees departing their boards (Harrow and Douthwaite, 2004, 2005). Also ,the extent to which an organisational climate of 'good manners' may, paradoxically, limit organisational learning at such key points, (Harrow, 2005) In this last case, it was argued that board members' departure was capable of being marked by lack of organizational attention to knowledge loss. with board members' often choosing silence, and taking their learning with them, despite , in some instances, board investment in their development.

This work, including the practice-response that it has received, has led to further questions concerning the underlying rationales for board member departure, the kinds of board legacies that they leave, and the impact on the sector generally of relationship severance, in a period when volunteering (including board volunteering) is increasingly encouraged by governments. What do accounts of exit as well as entrance tell us about the nature and operating rationales of nonprofit boards? How is board member departure presented in the public - and private lives- of boards ? How does board development support and sanction those departures? To what extent are departing board members gathered up by the boards of other organisations, and thus 'recycled', or departing the field, in various states of exhaustion or disappointment. Why, where and how can board members' departure be celebrated ? What kinds of positive learning can occur where board members' departure has occurred because of or during a board crisis? How important are exiting members' negative accounts for board and organisation learning?

This paper presents findings from the next stage in our work on board exit, in which we address , in a small scale pilot study, the reported experiences of departing board members at points in organisational life which may be regarded as either an organization *transition* (for example, organizational merger or major board restructuring) or an organizational *crisis* (such as impending closure or external scandal.) In searching for a research approach which would not automatically draw on and record board members' negativity , we have explored the use of 'Appreciative Inquiry' (AI), an approach "uniquely suited to organizations seeking to be..genuinely caring for both the

people in the organization and those whom they serve".(Johnson and Leavitt, 2001,132.) From the complex work of Cooperrider et al ,(2004) developed from the 1980s, AI emphasises the highest achievements and core values embedded in all human systems. (Finegold et al, 2002). Its use has extended to measuring impact among small voluntary organisations (Reed et al, 2005) and its helpfulness can be expected to be considerable, where the complexities of individual board members' 'commitment' and 'value' to their boards are examined. (Preston and Brown, 2004). Also, where nonprofit boards are moré diverse in membership than their corporate equivalents and "possibly, as a result, more contentious" (O'Regan and Oster, 2005).

The title of this paper may however suggest a degree of facetiousness on our part; a character trait of those academics who seek to mark their papers by 'catchy' titles. Yet it is also central to an underlying theme of our work, Where we have examined this exit phenomenon, whether through case examples or perception studies with departing trustees we have found a continuing tension between the tendency in the nonprofits to praise (and praise heartily) those board members who depart; and board members' own desire to reflect more critically on 'their' organisations' progress and development, in ways in which praise, *per se*, does not feature.

Simply in the context of volunteering alone, it is of course clearly important to praise, be thankful for and elevate the contributions of departing board members. Yet our earlier sense was strong that organisational practice of going beyond the grant farewell luncheon or presentation on occasions of board departure was very limited. "Praising Famous Men " – and the majority of board members are men in the UK – was likely to be the summit of organisational practice. At the same time, we were also aware that respondents in our limited research to date had expressed varieties of frustration, sadness and 'shoulder shrugging' in their exit accounts , whether or not departures had been as result of board crisis or part of the normal working system of their board. There was almost *no* positive- learning- being- shared accounts reported to us. Indeed ,some accounts had been misery laden to the point of causing us some anxiety as to our responsibilities to our respondents , insofar as we were uncovering episodes of sadness; bearing in mind Lee's emphasis on such responsibilities where other than "innocuous topics" are being explored(Lee. 1993, 2).

Others had perhaps started to disappoint us too, perhaps even irritate us, albeit that that is not a characteristic which researchers may not be expected to have, or at least not declare. Was this 'all there was' , in examining the reflecting on board members' exit.? Were we merely writing academic "songs of farewell", as one fellow academic cheerfully characterised our work?

Or, had we been asking the 'wrong people'? This could have been an inevitable accompaniment of non-probability sampling ,where we have relied on purposively selected groups and / or 'snowball sampled' individuals. Although the England and Wales Charity Commission keeps records of all charity board trustees, it keeps no records of those who have resigned or ceased their roles; and resignation or departure is a matter for report only to each individual board. An earlier approach to

the UK's Charity Trustees Network, a pro-active 'self help' and supportive group for trustees, for participation in our work had not proved successful.

Were we asking the 'wrong questions', in the sense that inviting personal accounts of 'what happened next' and promoting the idea of fully fledged exit interviews, was at least likely to err on the negative side of the experience? Or were we asking questions in the 'wrong way'? This last question brought us to consider where an appreciative inquiry stance (albeit without the action research component which invariably accompanies AI) would be helpful for our research; by ensuring emphasis on positive outcomes and pro-actively exploring how organisations could gain from and not be blamed concerning their handling of board departures.

This paper presents an account of our progress in developing this approach; and our reflections on its usage, and the findings which it uncovered. The paper provides a brief review of the key themes and argument of appreciative inquiry and examines its application in a research context, as a 'guiding principle' framework for research. (It does not examine in any further depth the literature on nonprofit boards and board effectiveness, which is widely undertaken elsewhere and certainly provides a further theoretical 'backdrop' for the work.

The paper then sets out our approach to its use and the limited results which we obtained. It concludes with reflections on the AI approach as an entry mechanism for discovering trustees' experiences at critical times, recounting the difficulties we had in sustaining the "positive lens" approach to our research topic; also on AI's role in supporting and researching the organisational learning that comes experiences of board exit which are disappointing, frustrating and even frightening, as well as heartening and validating.

The literature on appreciative inquiry

The literature on appreciative inquiry, as an approach to discovering about organisations and as a means of supporting their change, appeared very encouraging, in handling this degree of organisational paradox which we were trying to manage, as researchers. Cooperrider and Srivasta (1987) present it as a form of action research that attempts to help groups, organizations and communities create new, generative images for themselves based on an affirmative understanding of their past . As such, this might be expected to offer particular value for those voluntary and community organisations, where organizational memories of "the past" may be especially critical in helping determine their present, for example in relation to founders' intentions. (Block,).

Bushe and Kassam (2005) cite a key element in appreciative inquiry's "transformative potential" as its focus on changing how people think, instead of what people do. .Van de Haar and Hosking

(2004) emphasise the importance of understanding appreciative inquiry as manifesting differently in different local-cultural and local –historical contexts; and we would argue that all non profits boards 'are different' in this respect.. The elements of the AI approach are presented by Bushe (1998) as follows:

"The basic process of appreciative inquiry is to begin with a grounded observation of the "best of what is", then through vision and logic collaboratively articulate "what might be", ensuring the consent of those in the system to "what should be" and collectively experimenting with "what can be".

Thus AI has its roots in organisational development as well as action research. Carter (2006) articulates the promise and the challenge : " at its heart, AI is about studying, exploring, actively searching out the best and focusing on what is good, strong, already working and being achieved in organizations". In her subtitle – ' working appreciatively to make miracles instead of finding problems' – Carter stresses the degree of promise on offer and explores the value of taking a 'non – problem' approach to research in areas where a 'problem base' is the norm. (In this case, multi-agency working with children and families with complex needs.) AI's use in studying activities or events which are intendedly optimistic and positive –directed, though in fact attracting negative elements and experiences is also demonstrated by Reed, Pearson et al (2002) in their work on discharge from hospital.

AI as a research tool – will it work for board exit?

As the literature on appreciative inquiry grows, both from consultancy and research perspectives, there is a limited but growing number of papers and reports of its application in nonprofit contexts, for example in underpinning schemes of evaluation. (For example Reed et al's work, 2005, incorporating AI into studies of impact assessment.) .In relation to underpinning a particular research design, there is less evidence of its use. Using academic web search engines, we found only one paper advocating such an approach, and that more emphasising AI's potential rather than delivery. This was Michael (2005, 222), where she discusses "its application to interview-based field research in within the development context", drawing on research conducted with directors of NGOs in Africa. Michael argues that AI, whilst beginning 'from the best', can "help researchers to gain a textured and detailed understanding of both their subjects' greatest successes and most serious obstacles" (ibid.) Moreover, using AI in interviews "creates a comfortable and stimulating environment for the interviewees that can yield an exceptional quality of information" (ibid.)

Whilst this was very encouraging, it also emphasised the extent to which our research focus and therefore task, differed from this generalised account. . We were exploring a relatively hidden part of nonprofit life, at best, even in situations of organisation stability and success, likely to be tinged with some sadness; at worst, in cases of organisation transition or crisis , attracting a sense of organisational discontinuity or personal disappointment. It could be argued that in seeking to remind interviewees of what they had experienced or were experiencing we were not creating a

"comfortable environment" for them. Was a 'positive lens' approach to such situations feasible? This was especially in some doubt, given that our earlier work had cast much of what we discovered about board exit and the severance of trustees' and organisations' relations as a major 'problem area', to be 'solved' through application of learning from the knowledge management literature. (Harrow and Douthwaite, 2005.) It was Avital's (2002, 3) paper, juxtaposing problem solving and AI modes of inquiry, where the latter enables "a new vocabulary to emerge", and which drew the distinction between the problem solving paradigm, with learning occurring through "assimilated best practice" and the AI paradigm, where learning occurred when "drawn from situated knowledge" which encouraged us to progress.

Developing the field study – pilot work

'Plan A'

With a sampling frame necessarily purposive, as discussed above, and as a small (self-funded) project, we decided to examine a single organisation facing major changes as our unit of analysis, where there were by definition departing trustees to 'be had'; with conversational interviews to be held with all those departing, where we would test out an AI-led interview schedule. This would produce a single case study, with a 'full hand' of departing trustees. With a number of boards moving to downsize or reconfigure, often with the aid of facilitators or consultants, such an organisation might be identified through our own academic and practice networks. One such organisation was duly identified, a national disability organisation of some eighty years standing, which had undergone a major board reconfiguration. This involved reducing numbers, removing board member 'places' for other disability organisations with whom it had shared interests since its early days, substituting a system of ever-continuing board membership with a rolling programme of future departures and introducing a new regional element to board membership. Offering the experience of considerable upheaval and very likely a high degree of sadness for some trustees, where longevity of service was a hallmark, this seemed to be an ideal focus for an AI-led inquiry.

When approached via the facilitator, the new chair and the chief executive were in full agreement that all departing trustees to be approached; and also those remaining on the board. However, accessing this full hand proved problematic, firstly with administrative delays in being offered contact details and then with a number of departing trustees declining interviews. Only a complete pattern of access would have given our case study approach, so we decided therefore to cut our losses with the offers of the two interviewees which we did in the end elicit and move to 'Plan B'.

'Plan B'

This necessitated a part-shift from the organisational to the individual, i.e. the departing trustee, as the unit of analysis; and to continue to concentrate on individual perceptions of board exit, which were still AI-led. We decided to identify a minimum of four respondents, departing boards in what we described as 'non contentious' situations - 'natural wastage, friendly farewells, retiring on a time limit and so on – to provide four in depth pilot interviews, where an AI-led interview schedule could be tested. We took a convenience sample approach, using our own practice contacts. This produced four respondents, willing to undertake in depth interviews on their exit experience, as

well as giving brief resumes of 'their' organisations which they were leaving,(purpose, sub-sector, size, longevity and style of work)

For stage two, we decided to retain the organisational-interest focus for identifying departing trustees; and to explore situations of major transition and crisis, where trustee departure itself added to the organisations' difficulties but also potential learning. For these 'contentious' situations, we used the work of Miller and Friesen (1980,268), to define an organisational transition as

"modes of organisational adaptation that are characterised by the evolution of and interaction among environmental, structural and strategic variables"

From the work of Billings et al on crisis perception (1980,300), we defined crisis as

"a triggering event, compared to a standard, based on the probability of loss, the value of loss and time pressure".

For this stage of the work, we used a purposive approach, to discover a minimum of two organisations in each category, which had *also* experienced trustee exit linked to this transition or crisis. We used a process of 'nomination' (as a version of snowball sampling), whereby three academic colleagues, with consulting and facilitation experience in the sector, formed a temporary 'nominating panel' to help us identify organisations which would "fit both bills". Using this process, four organisational cases were identified where it was also possible to make contact with trustees who had left the board, whether formally or informally. Of these, two were London based (as are we); one is in the South of England, and one in the North of England. One of these organizations ('in transition') was the same disability organization that we had intended to focus far greater attention on; so that our initial contacts remained useful. In all five interviews were conducted, three in three of the organizations, and one organization 'supplying' two respondents. With respondent numbers so low, , this made the second stage in effect a 'second stage pilot' rather than anything like a full project.

Designing the interview schedule

Our first attempt to draw directly on the language of the '4-D' cycle in AI for the interview schedule , with its four phases - 'discovery' (the best of what is or has been), 'dreaming' (what might be), 'designing' (what should be) and 'destiny' (what will be).- was discarded. This because we were only going 'part way' into the AI cycle (that is, not going forward to action research in the organizations and we were concerned that would -be respondents would find difficulty in moving through the phases, without this interventionist rationale.

The interview schedule which we devised could perhaps best be advised as 'appreciative inquiry-advised', that is, emphasising the 'best case' and best learning scenarios throughout and seeking to avoid negative aspects of the board exit experience. It is set out as follows:

Against the background of your description of the organisation (purpose, age, size, work style)

1. What would you identify as the best or most positive aspects of your departure from the board?
2. What more would you have liked to have seen to enhance this departure as a positive experience - the 'ideal farewell'?
3. How might the organisation concerned make the very best of board departures in future – what should these 'look like' and 'be like'?
4. How do you expect the organisation to respond in the future to board exits?
5. What now are your own reflections on your board exit experience, (including the likelihood that you will in future or have already joined other boards, ie positive outcomes for the individual)

Interviews were conducted face to face in the first stage pilots for approximately one hour; and a mixture of face to face and telephone interviewing for the second stage pilot, where interviews lasted approximately an hour and a quarter.

Conducting the pilots

In both stages, the interview process was a demanding experience for respondents, and sufficiently structured to prevent them from taking a wholly narrative approach. Interviews of an hour's length, became lengthened in stage two, and designed as 'face to face'. However logistics of trustee location in stage two, and availability, meant that two were begun face to face but concluded by telephone. Reviews of the interview transcripts followed Sturges and Hanrahan (2004), where they report that no significant contrasts between material content gathered face to face and by telephone.

Using this framework -already a modified AI approach – offered an opportunity to balance the 'glass half empty or half full' arguments about organisational gains and successes, that are reflected in some AI literature. In our operation of this interview schedule, it could not be argued that the kinds of disclosures being made were such as to have potential adverse consequences for the participants or the group of individuals 'represented' by these respondents. However, the general sensitivity of the topic was very clear, notably where responses cast the organisations in a poor light (from failing to capture ideas and insights from board leavers to pressurising 'good' people to leave), or presented accounts of personal regret, even guilt at leaving "their" boards. Thus, the topic of board exit appeared to be a sensitive one for us as researchers, where sensitivity "is less in the inherent topic and more in the relations between topic and social context" (Lee, op.cit., 4).

Both sets of interview transcripts were reviewed using a manual system for analysis of content themes., with both authors scrutinising the responses and comparing results. Despite the sense of closeness which we developed with our respondents – both of us are also board ‘exiters’ as well – we did not share our analysis in a collaborative fashion with our respondents, following Hoskins and Stoltz 2004), where they explore “inviting dialogues about what is involved when we engage in analysis of our participants’ renditions of experience”. In retrospect, this would have been have been helpful particularly where we were reflecting on the extent of resistance to a positive dimension and interpretation being placed on the exit accounts. We had not ‘explained’ the AI approach in any detail to our respondent; only that our questions were coming from the starting point of learning what had been positive in the exit experience and had offered learning, for the respondent and the organisations.

The Stage One pilot- emerging themes

Limited descriptions of the four organisations from which the individuals were drawn were as follows:

Organisation 1: community organisation with a range of projects, which has recently celebrated its centenary , in an inner city location; respondent resigned, after eleven years on the board, after being unable to attend monthly board meetings because of work commitments

Organisation 2: a company based foundation and employee welfare charity; respondent ‘retires’ from the board , which has a rolling departure system of five years on the board

Organisation 3: a residents’ based community and social /recreational group, of long standing, providing social amenities in a village-type suburb, such as ‘old people’s welfare’, funding the local ‘Christmas lights’ : respondent left the board after an amicable collaborative merger with this group and that in the neighbouring community

Organisation 4: regionally based children’s charity with professional staff: respondent left the charity , after moving away from the region.

From the four first stage pilot transcripts, exits were occurring in non-contentious situations in board and organisational life. Three themes emerged from our immersion of these transcripts

- Self depreciation of respondents’ own contributions to the board

- Relief that respondents had finally 'got away' from the board; allied to criticism of fellow board members' behaviour
- A verbal (and in three cases literal) 'shoulder shrugging' approach to the possibility that their exit management could have been or should be improved and there could in future be positive outcomes from such departures.

The theme of self-deprecation went far into the language in use. Thus one respondent described her attempts at resigning, because of missing so many monthly board meetings, and a key strategy 'Day' through work pressures , with the clear implication she doubted the board's desire to retain her:

"but when I offered to resign, they said no, no, as they needed my expert advice..and again (after the missed 'Day') and again they said no, as I was too valuable to the board and it was always helpful when I did turn up...". (Organisation 1)

Another described the passing publicity which the organisation had gained in the town press, with photographs of staying and leaving board members, but which would be unlikely to be seen as representing any real achievement:

'There was a picture of us all (leavers) in the local (name of local newspaper) ..but who responds to these other than thinking, there's just another load of old do -gooders...fair enough...".(Organisation 3).

The respondent for organisation 2 perceived that she had done

"no more than 'my bit' – though I shall miss it, matters of life and death you know (laughs...)"(Organisation 2)

whilst another respondent was aware of an impact of her departure, but felt that other trustees' filled this gap:

"The staff missed the input and support that I gave them but there was other professional expertise taking the charity forward (from remaining trustees". (Organisation 4).

The theme of relief, allied to criticism of board members included the 'hell is other people' defence. Thus one respondent was very aware of other board members' more cavalier attitudes to board meetings, and was relieved to be out of a situation which she thought should be taken very seriously:

"..I was really aware of some people never sending apologies or turning up later and then leaving early, when others of us sat all through the agenda and we had last trains to catch, too...For example, the Risk Register was item on every monthly agenda but some trustees had always left by then.....".(Organisation 1).

In the case of the organisations in amicable collaborative merger however, the relief was a more personal one:

"I was sort-of relieved for me really,,and anyway I don't see the board as a 'thing', just a collection of people, where there some people I liked and some I didn't..."

whilst emphasising that there was always likely to be difficulty when

"..you get people staying on boards to help – I can think of a treasurer who should have resigned yonks ago – and they hang on and on because they feel an obligation to stay... (sighs)" (Organisation 3).

Criticism of their boards' behaviour was in some cases seen in relation to the farewell – or lack of it. In Organisation 3, the respondent reported that

"my daughter said we should have had a bigger... er...thank you - maybe a garden voucher – but it was sensible rather than special." (Organisation 3).

Despite knowing that 'retirements' from the board were a regular feature, in organisation 2, 'they' (the board) were described as handled the departures "neatly" rather than in more planned ways such as mentoring of new colleagues:

"yet they know there will always be this old hands/new blood thing". (Organisation 2).

The theme of 'negativity' was nearly an all-encompassing one. Governance issues for these boards seemed likely at best either to prevent any real change from situations where people felt obliged (and then guilty) about leaving or at worst , keeping people on the boards because of the difficulty of getting a full membership , and continually putting off the idea of time-limited membership. The sense of paradox appeared implicit:

"this isn't a good way to run an organisations which has never come to grips with revolving trusteeship because of the struggle to get local people on the board,... and then they are very grateful when local people do come on the board but they don't stay..and it's the great and the good who stay on and on...." (Organisation 1).

Ideas that might support these boards more positively were expressed with some sense of wistfulness rather than with any idea that they could every be achieved:

"..(I) really would have liked to have taken some sort of sabbatical from the Board and then come back – would this work and is that possible" (asks interviewer) and

"it would be really good to have departures celebrations some kind of cross between an exit interview and a party (laughs uncertainly); at least this would create a memory record of people..." (organisation 1).

In organisation 2, an opportunity just to pass on some basic thoughts about what the departing trustees knew – or even thought – was missed, but perhaps inevitably so, as the chances of saying something critical were minimal:

"actually now I remember, we were all asked to write a piece for the firm's newsletter but they didn't give us any guidelines and I certainly didn't do it and I don't know anyone else who did..well it might have been easier to have had a sort of Q and A thing - but then I'd have been nice in it, and it was mostly nice..."
(Organisation 2).

Moreover, in the case of organisation 2, the respondent went on to doubt that any departer/incomer learning and link was really feasible:

"Is there anything worse than people saying 'in my day'..I think people have to make their own mistakes".

Only from the respondent in Organisation 4 was there any sense of the departure being in the context of the board wanting to gain more by knowing more about itself and its organisation. From her experiences, ideas that might work to this end on the context of this type of organisation included:

"..(departing trustees) using a board meeting to give.. a final speech addressing the board.. and handing over to another trustee in particular, to share information"...

The second pilot – the transition and crisis settings for trustee departure

The following two organisations were those identified as 'in transition':

Organisation A is a disability charity providing specialised equipment for disabled people , with a long and distinguished history. That history includes links with a far larger disability charity since its inception; and their membership of (and influence on) its board. The decision by the board to modernise its governance, with external facilitation, led to a fullscale board reconfiguration. This involved both a major reduction in numbers , regionalisation of board members and the cessation of any representation on the board from the larger disability charity. Longstanding board members were therefore required to leave the board. Representatives of the larger disability charity were especially angry, apparently at the loss of influence and their 'parent' warned of impending legal action to prevent these changes. Although these did not in the end materialise, and the required board members left as required, this has cast a considerable shadow over what was planned as a revitalised and modern board.

Organisation B is a large, well-established and wealthy benevolent fund supporting older people, where the decision to rebrand to a more appropriate ('modern') and descriptive name was taken. However, the further decisions over the name and its launch were considerably delayed, accompanying by an apparent lack of chair leadership, and leadership from some members of the board. This produced a ripple effect in the form of a challenge to the fundraising department and its staff, initiated by the Chair, and the arrival of outside consultants to assess the effectiveness of the fundraising. The Director of Fundraising resigned shortly afterwards and the Chair was involved in the recruitment of the new Director; however the Chair has himself now resigned as he had planned.

The two organisations 'in crisis' were:

Organisation C is a charity providing much needed residential care for elderly people, which has struggled with financial pressures and rising costs ; and has been supported by essential hands-on help in financial matters over several years by some of its trustees. The appointment of a new chief executive turned from advantage to disappointment , culminating in the chief executive's dismissal, after 'whistleblowing ' to the Health and Social Care Commission from among the trustees. However it is likely that the dismissed CEO will challenge her dismissal at an employment tribunal. Meanwhile members are resigning from the board and it is likely that many of those on the board responsible for the CEO appointment will soon have left. In particular, the treasurer, as one of the whistleblowers, is in the process of resigning.

Organisation D is a very newly –established small charity, rapidly gaining a sound and valued reputation for its advocacy –led support services for vulnerable people, in an otherwise affluent locality. To capitalise on its quickly-acquired standing, it needed infrastructure funding. Board members were encouraged by seek out funding sources, 'anywhere and everywhere' by the chair and by the organisation's founder (not a board member; working as the sole full time worker, having initially been unpaid.)

Board member 'X' used her fundraising expertise and personal contacts to identify a strong and significant source of funding from a major regional Masonic Lodge. A newly appointed board member, 'Y', however, objected strongly to this funding source; and with growing support from some other members, laid down policy on 'non-approachable' funders (including the government run Lottery as well as masonic groups.). Board member 'X' was shocked and felt that the board had put her in an untenable position. She resigned, combining her departure with a move away from the area. No further infrastructure funds have been found (or sought) from independent sources, and statutory funding, for contracts, is now wholly relied on.

From the interviews, from respondents in these four organisations, only one shared theme – that of the negativity associated with any positive learning and organisational 'getting better' as a result of theirs and other trustees' exits – appeared. Even this was tinged with a limited glimmer of hope for learning, so that this may be better called uncertainty . Unlike the 'non –contentious' departures in the first stage , each respondent asked the interviewer for , and received, confirmation that their responses would not be transmitted to the organisations in question.

Perhaps because the financial or CEO failure crises, and the board reconfiguration and organisational rebranding all represented events of significance against which the departing trustees could measure themselves; and all were confident of what they had been able to

contribute in their own right. This even occurred where they were deferring to others - whether a majority decision with which they did not agree or a board member with new expertise. Allied to this confidence was a sense of anger , or its lower-key ally, regret at their departure and the way in which it was – or was not –marked by the organisation. A marked sense of reflection on the governance issues which had led them to that point also emerged, with variations on the directions of organisational response.

The major themes were therefore

- The theme of confidence in the respondents' contributions as they left the board
- The related sub-theme of anger or regret at their departure
- The theme of the necessity for board exit being better 'managed'
- The theme of uncertainty as boards' future learning regarding their board exit practice.

The theme of confidence in the respondents' contributions as they left the board

For all four organisations, respondents stressed the sense of their own contributions and in some cases their own power to go at a time of their choosing. For example,

"I felt it was time to go and I had given all the time I had had...indeed, about eighteen months before, when I inquired into the Fundraising , as a result there were people who thought I should have gone then but I was not going to go as it was not the right time ; when I gave notice, that was the right time.. " (Organisation B)

One respondent stressed their skills as central to the board

'I was a manager so my skill was in managing ..though I accept that the emphasis now is to look at all the skills needed' (interviewee 1, organisation A).

For the second respondent in organisation A , confidence was expressed in terms of recognising that he took an appropriate 'window' in which to leave and that a incomer replacing him was immensely valuable:

'I engineered it. (my departure) .I am seventy two and think it is time to go; this business of reducing the boardgave me the opportunity..and I would rather defer to him (new member with university, banking and radio experience) .(interviewee 2, Organisation A)

Confidence in the sense of being over-relied upon and being expected to 'take up' other trustees' suggestions with alacrity was the hallmark of the respondent in Organisation C, and to a major extent the trigger in his decision to resign, i.e. an inactive board happy to get by on his expertise and input as treasurer:

'The motivation to leave is it has become a one man band, which is not healthy...Some of them – well 95% of them do nothing, they are not informed ..they see the charity as a good work exercise in itself and not to support good work...they think coming along to monthly meetings is sufficient...." (Organisation C).

For the respondent in Organisation D, it was important not to be seen to be resigning in pique, but to be still able to send the message that the backtracking from the board had occurred was unacceptable practice, not just for her, but to any other board members who might, as the respondent expressed it, "gone out on a limb" for the organisation

"I knew I had done a good job and I didn't resign because of this...but when I decided to move well away, and be, much closer to my mother, pretty soon after, it was another deciding factor in moving out and moving on..."

Moreover, she was clear in retrospect that the 'the positive aspect of her departure', had been that it had been

"real kick up the backside for those that were on the board – if they were going to do this and be sniffy about money coming in, they'd only be able to rely on stat. (statutory) funding – and then they'd have to get other bits of their act together...". (Organisation D)..

The related sub-theme of anger or regret at their departure

This was voiced equally in organisations in transition and those in crisis. For the latter, one respondent, manifestly struggling with the style of our AI- directed questions, which required him to seek out the most positive aspects of his departure, admitted defeat in a poignant fashion:

"I would have preferred not to have left.....I accepted that there was no opportunity to stay.....after working for (Organisation A) for sixty one years as a volunteer and the last fifteen as a trustee, when I was co-opted on as an appreciation for my volunteering....Personally, I would have liked to have retained the link... (interviewee 1, Organisation A).

For this interviewee, whilst accepting the value of trustees' fixed terms of office, and the necessary "checking out" which this entailed, there was still no getting away from the feeling of "being dispensed with".

In organisation D, a degree of anger was palpable, not so much at the creeping decision of the board not to accept funds from certain sources, but at the position which this left the departing trustee – having used her professional (fundraising) network skills to attract a potential donor who had become very interested indeed in the organisation's work and was now going to have to be told that their money was unacceptable:

"I told them (the board), don't you tell me to do something, which I do, and then turn round and tell me I can't do it...". (Organisation D).

Exhaustion tinged with anger and not a little humour was reflected in the response from the respondent in Organisation C, where the inactivity of the majority of the board was not only cited as the resignation trigger but was such that the kinds of pressure being exerted on the respondent , as treasurer, had not even been noticed:

"and they all came up with ideas and then expected me to act on them. I said, "on your bike, of it is such a good idea, you do it... ...the trouble is if you are conscientious and no one else is doing things then I get angry...."(Organisation C) .

In organisation B, where the respondent perceived the strength of their own role in moving the bard forward, the sense of regret was linked , albeit briefly, to the final manner of departure, in contrast to his own practice, whilst embedded on the board, of lengthy hospitality for board members together, and drinks after board meetings

"The President gave me a dinner and I resigned at the AGM, there was nothing else..but I think that was probably appropriate..the charter now defines the procedure and the AGM is quite a forum, and a good moment for change..." (Organisation B).

The theme of 'more managed' board exits

This was a marked but more variable theme. For some respondents, it took the form of noting the lack of the 'ideal farewell', in the sense of minimally marking their departure. Thus

'Being selfish, I would have liked some sort of farewell;an acknowledgement of my years of service would have been a generous gesture. The chairman at (my) last meeting said thank you to all those who were leaving , and whilst I was not looking for anything personally, it lacked something....".(interviewee 1, organisation A.)

For the resigning trustee in Organisation D, the departure itself was a 'non event':

"I think they noted in the minutes that it was my last meeting and wished me luck - but with my house move! And all the people who had voted against ..(receiving funds from a Masonic organisation) ..weren't even there..." (Organisation D).

For a second respondent in Organisation A, a sense of the need to recognise and think through what role any trustees representing associated organisations ought to have on boards such as his was important, and perhaps some gentle critique of the 'clean sweep' which the reconfigured board had produced:

".. only slight disappointment (now that) XXXX is no longer represented on the board ..they can be control freaks and they want to run everything but (they are) a major disability organisation and it is unfortunate they are out of it" (interviewee 2, Organisation A) .

Within Organisation A, a difference of opinion as to what was a 'tidier' departure strategy was also marked. Thus, for respondent 1, the "clean break" was in fact preferable, notwithstanding "my own feelings". By contrast, respondent 2 in Organisation A is not "going off into the sunset" but

remaining a non –voting non-trustee co-opted member of a technical sub-committee, "so there is no loss ..of my expertise".

In Organisation C, where the respondent regarded the board as in "meltdown", there was no response at all to the idea of any more progressive or managed 'farewell', but rather a critique of a board organisation, which had taken him perhaps "five years to really get to see all the problems", and which lacked any mechanism for ensuring regularity of board departure of any sort - whether time limited, or on grounds of age or expertise. In retrospect, a sloppiness had affected the board – "do you know, for years I was not audited", and one thing was now clear

"the trusteeship should be different from the old bats there now....."

The theme of uncertainty as boards' future learning regarding their board exit practice

Issues around future of board learning regarding exit and related governance issues promoted extensive consideration by respondents, in contrast to the more perfunctory responses in the first pilot. This was likely to be a function of the relative drama of the transitions or crises which formed the contexts to their replies .

For the outgoing ("escaping") respondent in organisation C, the sense of anger and exhaustion continued to pervade the immediate response to the question of positive management of board exits in the future: "*Never in a thousand years.....*". However, from this he went on to reflect on the impact on Organisation C's board of what he knew to be "a saying" around the combination of knowledge or its lack and action/inaction.

"..there's of course no case for (having trustees with) no knowledge and no activity....but the worst case is where they have no knowledge but are still 'active' ..."

continuing to cite the case of a fellow board member who had queried his handling of the tax affairs of a former staff member who had returned as a student (correctly, as it turned out); but who had gone "whinging about what I had done to the chairman", rather than approach him directly. In desperation he noted that

"I know we need skills in everything and there is a website² which indicates there should be a level of expertise for trustees but it is not happening here".

In the context of organisation D, the respondent foresaw no likely changes in managing board departure and from what she now knew of the organisation, the development of a more 'managerialist' rather than "go -getting" board, as the organisation came to terms with the fact that it

² This was not confirmed at the time of the interview. It is most likely to be the government-funded 'Governance Hub' website, www.governancehub.org.uk; and its "Good Governance: A Code for the Voluntary and Community Sector".

would seek all its funds from public sources, working for contracts. On a wider board development canvas, she noted that

"there's a question about 'being brave' on boards when it comes to leaving; and I think this applies to the smaller ones , where you might be all too well aware of what would happen if you went, even a catalyst for everyone else resigning – I 've heard of that happening..... ; but on some of the largest ones, too, where you might think it doesn't matter so you don't resign for that same reason, and don't want to put your head above a parapet".

In Organisation A, respondent 2 was relatively positive about future board exit strategies ("you will always be glad to see the back of some people"); but was reticent in identifying more pro-active approaches to capture departing expertise:

"I suppose someone with that knowledge and expertise should be asked for some ideas about what should be done..trustees should be invited to think about it and make it available".

Respondent 1 in Organisation A was similarly aware of the organisational realities of drawing on departing trustees' expertise, especially when the 'clean break' system of fixed terms is in operation:

"Practically, how does one ask people to share experience - do they write an essay, which would probably be binned or do they give the information personally?"

Reflections

This two stage pilot had not only drawn for us the very complex nature of board exit (in non contentious as well as contentious settings). It had demonstrated for us the value of pilot work well beyond that of refining a particular research instrument, by its identification of the multiple interpretations of exit 'dramas', and of the extent of the sensitivity of a research topic, which if minimally studied is not exactly 'taboo' (a characteristic which Lee notes, op. cit., is one more narrow definition of a 'sensitive' research field), and where issues of respondent protection may come in to play. This accords with Samson's work (2004, 383) where she notes the "tendency to link pilots with more positivist approaches in social science" and suggests that pilot work has much wider uses, for example "in foreshadowing research problems ..in highlighting gaps and wastage in data collection."

The findings had helped us form more clearly our initial understanding of questions around the celebration (or otherwise) of board departure and the ways in which learning may still accrue to organisations even in crisis mode. They had also incorporated more ideas for an earlier research theme of ours on knowledge capture of departing trustees – for the exiting trustee's 'address to the board', and the notion of trustee pairing – but also emphasised the inherent difficulties in such tasks, beside the likely extent of goodwill needed on all sides, both to set down and make use of

that knowledge. The warning about the implied impracticality of a departing trustee solemnly sitting down to 'write an essay' about their perspectives on the board's and the organisation's past, present and future, which would then be simply 'binned', once received, rang all too true with us.

Our own closeness to the research topic – as board members who have resigned from particular boards but then joined others, serial board volunteers – had meant that our thematic approach had had to be handled with care. Here, Dressel and Langreiter's (2001) discussion on "when we ourselves become our own field of research" has become useful, with their distinguishing between issues of 'distance' and 'nearness' for researchers. Our transcript reading suggested in places a high level of empathy with respondents, which might have encouraged an over-dramatisation by some of respondents at times. With hindsight, having a second set of 'readers' of our transcripts would have been appropriate. Whilst our situation cannot be said to be as significant as that analysed by Shah (2006) where she reviews the world-sharing that takes place when a researcher with disabilities is researching with respondents with disabilities, the importance of shared experience in this research field may need to be examined, with comparison and contrast made between the work of those researchers who have and those who have not experienced the triumph and trauma (and sometimes triviality) of board exit.

The thematic identifications which we were able to make from this small scale work have begun to suggest an underlying body of theoretical thinking which is capable of extending our understanding of the nature and organisational implications of board exit and exit management (or 'non-management'). Whilst we did not set our stall to become grounded theorists this is perforce what we have become. Collectively, the themes were

<i>First stage pilots</i>	<i>Second stage pilots</i>
Self depreciation of respondents' own contributions to the working of the board and the organisation	Confidence in the respondents' contributions as they left the board ; related sub-theme of anger or regret at their departure
Relief at departure from board; allied with criticism of other board members' behaviour	the necessity for board exit being better 'managed'
Doubt that much if anything could be improved, to maximise boards' future learning from member exit	Uncertainty as boards' future learning likelihood regarding their board exit practice

Together this emphasises the personalisation of board exit as not simply another stage on the governance 'ladder' in non profits; but rather as an individualised and complex experience in which

the intrinsic rewards which are so often the stuff of discussion about nonprofits' 'work' , are sought but not found. This suggests the importance of the examination of personal and implicit board member 'contracts' with their boards, the extent to which board members are given permission (or give themselves permission) to vary those contracts; so that the concept of board careers as well as those of paid staff comes to the fore. In this context the organisational means of saying goodbye as well as saying hello has to be given greater prominence. The shared sense of doubt that much would improve that marked the first pilot responses (perhaps a function of weariness of the board actor role) became more strident but also more authoritative in the second pilot. This raises issues of transferability of learning within nonprofits and the extent to which all the cases were so very singular in their form that operational and value-based approaches to managing board exit – only another area of 'valuing people' after all – are difficult to generalise in the canon of what passes for 'good governance':

If a theoretical blanket can be thrown over our findings from these limited pilots, then this may come from the literature on improvisation , which one of us (Harrow, 2004) has already begun to explore in the nonprofits context , marking its absence from this field and suggesting a less valued and even anxious sense of improvisatory capacity in the sector, in contrast to its being lauded in for-profit contexts. The organisation and board member vignettes which this pilot work has produced suggests a form of improvisation (even in the more apparently 'best managed' settings) which is less entrepreneurially associated than that in business, and more driven by the inability of many organisations to develop flexible strategies s and so plan ahead of improvisatory needs. This area of scholarship requires further attention.

However, all of these reflections are skirting round our central question - *Is appreciative inquiry helpful in researching board member exit?* In answering this question, we can only answer 'to a limited extent'; and that has been in the context of helping to channel and direct our scholarship; and barely at all in enabling departing trustees (especially disappointed or angry ones) to identify helpful outcomes for 'their' organisations if not for themselves. In writing these words, this in itself may sound patronising – or matronising – as if we felt (as we did) that there are people out there hurting", and that an Appreciative Inquiry approach would form some kind of salve on the hurt. If this was so, we seem to have been mistaken. The first stage pilot interviewees in particular, were mostly wishing to shield their organisations from any responsibility of having to learn (something else) from the departures they had experienced, and evinced in some cases a degree of organisational and nonprofit world-weariness that almost denied the worthwhile nature of an AI approach, unless it was something that loomed very large. The second stage pilots were more ready to accommodate the notion of seeking positive aspects of their exit experience, but tended to use the 'search for the positive' as a means of pointing out organisational failings, or of indicating that there was such a major change occurring that the positive outcomes could only be inferred and would have to wait to be tested.

Our interview schedule perhaps now seems to have been 'squeezed in' to an AI mould rather than flow well from it, and it was striking that the future scenario reflections (akin to the 'dreaming' stage of an AI model) was one which all respondents, without exception, found difficult to do. Of course the response "Mmm..I'd have to go away and think about that" may also reflect, more simply, the lack of time and space in busy board members' lives to step back and envisage what might be, than any rejection of the AI thinking and doing framework. At its very best, respondents' assessments of what could be achieved were 'appreciative –up-to a point' .

It is also possible to take issue with the general; flow of our chosen topic, as almost inevitably likely to swing back towards negative explanations and accounts; and where it would very difficult to find a case of wholly positive practice , eg a chair leaving at the 'top of their game' and handing on to another, similarly placed. Further, a more rounded research approach could have ensured at la greater number of positive organisational stories ; for example, taking organisations as the unit of analysis and focussing on the dual aspect of board change, ie on entrances as well as exits. Together , these might have gained a stronger sense of the "comfortable and stimulating environment" that Michael (2005) says is a feature of using AI in some nonprofits. (op. cit.) The individual as the focus for study, again, may have militated against the chances of this interpretation; especially in the first pilot, where the more self -deprecating accounts (of people who were just doing their bit, nothing spectacular) were hard to interpret , without the inputs of fellow trustees and a deeper understanding of organisational circumstance.

Finally, we would recognise that we are only developing what must still be a surface understanding of the nature and nuances of appreciative inquiry. We recognise that in divorcing the AI approach from an action research stance (i.e. we were not in a position to intervene as a result of our findings in any of the organisations studied) this may have severely restricted what it can deliver and how organisational and individual experiences can be reframed to mutual benefit, not disbenefit. When we were reflecting on the final discussion in this paper, we came across, serendipitously, Todaro-Franceschi's (2003) reflections on 'mistakes in research: an appeal for tolerance' and wondered if this was where we had reached, and whether we too should be asking for tolerance or even making apologies.

In practice, we do not feel that we are quite here – and nor, it must be said, did our respondents, even if some f them initially baulked at the *way* in which we were asking our questions and the nuances we were seeking in terms of 'good' and 'better' outcomes. In the light of our wider conference theme and the extent of governmental support for nonprofits generally and their 'good governance' it must remain the case that board exit management can become a major learning means, and a source of positive and not negative stories for the sector. AI can be seen to offer still 'the promise' of improving and bettering practice and outcomes; and we will seek a research site where we are able to move into the intervention/action phase which was lacking in these pilots. We plan not to give up on this approach, or at the very least, encourage the development of organisational climates in nonprofits where the 'songs of farewell' are memorable, cheerful and worthy of repeating.

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