Appreciative Inquiry Facilitator Practicum

Excellent New Employee Onboarding at MCLS

Jan Davidson

Project Manager/Facilitator, Midwest Collaborative for Library Services (MCLS)

davidsonj@mcls.org, (800) 530-9019 ext 111

vAIFT, online, July 2020

Instructors: Jeanie Cockell and Joan McArthur-Blair

Table of Contents

Appendix A: Agendas *(Core Group meeting; Inquiry Part I; Inquiry Part II)*

Appendix B: Core meeting informational handout on co-creating the Interview Guide

Appendix C-1, C-2: Test Modified Interview Guide and final Modified Interview Guide and Summary

Appendix D-1, D-2, D3: Slides of PPT presentations *(Core Group meeting; Inquiry Part 1; Inquiry Part II)*

Appendix E: Participant workbook for Inquiry Part I

Appendix F: Context information shared with the focus area groups during Inquiry Part II

Appendix G: Google shared docs used for Inquiry Part II

Appendix H: Recommendations Brief to MCLS Management Team

Organizational Description

Midwest Collaborative for Library Services (MCLS) is a non-profit, member-driven organization whose mission is to facilitate sharing resources and to collaborate with other organizations to benefit Indiana and Michigan libraries. It serves libraries of all types (public, academic, K-12, special) across both states, with its primary focus on its 600+ member libraries. MCLS currently has 25 staff members across five distinct departments and has seen a lot of change in its staff over the past several years. Many staff have identified some of the things they value most about working at MCLS as the organization seeing them as full human beings with lives outside of their work; the community feel and relationships developed among the staff; and the feeling that their work matters in the world.

About three years ago, MCLS' long-time and founding Executive Director retired, and a new E.D. was hired. Unrelated but near the same time, the staff member in charge of Human Resources left the organization, and the position was not refilled directly; instead, the H.R. duties became split among several different employees. The interviewing and onboarding process for new employees became primarily the responsibility of each hiring manager (MCLS' management team is four departmental managers along with the Executive Director.) The only part that stayed completely standardized was the legal onboarding paperwork, which was delegated to the Business Manager under her benefits administration role. Within a year of all this transition, the global covid-19 pandemic hit. Whereas MCLS previously had most employees based out of their Lansing, Michigan office (with just three members of a single department based from their homes in Indiana), they have spent the past two years with almost all employees working primarily or exclusively from home.

Since the changes to Human Resources and executive administration three years ago, MCLS has hired and onboarded eight new employees. Seven of these eight hirings have taken place since the pandemic started, and many employees have never met in person, after being used to an office-based culture steeped in interpersonal relationships and valuing employees as whole human beings.

Narrative Summary

I am an employee of MCLS, having worked on the Engagement, Consulting, & Training team since being hired in June 2016. Along with other projects, our team facilitates strategic planning processes for libraries (for which we utilize the SOAR process, the Paired Appreciative Interview tool, and sometimes the 5D process) and community engagement (for which we have often worked with Maureen McKenna's AIR - Appreciate, Imagine, Reflect - framework.) The deeper I dive into the world of Appreciative Inquiry, the more I feel I have come home. When I was able to participate in the vAIFT cohort in July 2020, pieces of our work began to come together to enable me to understand the reasoning behind the methodology and more about why it works, like the pieces of a puzzle coming together, allowing me to see the fuller picture.

As I was exploring options for a Practicum project for this certification, my manager, Pam Seabolt, and I discussed our mutual desire to explore the best of what had been in onboarding at our organization, and to help our leadership dream and design a more intentional process for the good of the employees, the organization, and ultimately those we serve. It was important to both of us that the staff all be empowered to be an integral and meaningful part of the process, and the Management Team approved the project. I was excited to facilitate the Inquiry in such a way as to earn my certification, but also to help the organization I care deeply about become its best self in terms of this incredibly important topic.

My own onboarding experience at MCLS is a lot of the reason I work here today. When I left my interview, I was not sure if I wanted the position, but although the field was new to me and the role in some ways a backwards step, career-wise, I knew I wanted to work as part of the team I had just met and as part of the organization I had witnessed. Over the next weeks and months, that feeling only increased and cemented my dedication to the work being done and with the people doing it.

Like many people and organizations during the past two years of isolation, we have experienced a breakdown in our organizational culture, which had been the heart of who we are, a core value of our nonprofit. Our current organizational chaos when it comes to onboarding is worrisome to many of us, as I heard a shared belief that this is the "make-or-break" time for employees, affecting in significant ways a new employee's emotional connection to (and sense of loyalty to) a company. We recognize that successful onboarding processes can greatly affect longevity, depth, and satisfaction of employment. While our staff may have different ideas about the best ways to achieve this or what this would look like, the fact that we shared these base beliefs was clear when seventeen of twenty-five responded positively to the invitation to take part (with three more making a point of letting me know that they wouldn't be able to participate due to scheduling conflicts, but that they felt it was important and were grateful that we were taking the time.)

I enjoyed the process of working with our staff on this Inquiry *so* much. The energy I saw right from that initial invitation response carried through the two days (even as we had to push due to weather) and into the weeks since. Beyond emails and kind words shared about the process in our staff meeting the following week, I saw as a highlight the feedback from a colleague who had been outspokenly skeptical in advance, yet now speaks highly of the potential for positive change for our organization, and even of AI as a tool. I take it as a huge compliment to the process that 15 are participating again, right away, in my teammate's practicum Inquiry the following month! I am grateful to have been given the opportunity to work with our staff and look forward to seeing the positive movement to come.

Practicum Report

Define

The 5D process was begun when Pam and I identified a need in our organization for an Inquiry into the onboarding processes. The management team agreed with the need and approved me to go ahead and invite all staff to participate if they were interested. We all agreed that the most effective Inquiry would involve a cross-section of the organization and would include at least one participant from each of our five departments (Administration; Shared Learning Systems; Engagement, Consulting, & Training; Group Purchasing; IT & Accounting) as well as a mix of newer and longer-term employees. We felt it was important to allow for all who wanted to participate and to have all perspectives heard.

Core Group and Positive Topic

To help me refine and prepare our inquiry, I invited three employees to join me as the Core Group. My original three invitations included a male and two females, all three from different departments, with varying amounts of time at MCLS, and did not include any management, as I really wanted this process to come organically from the wider staff without even a false sense of mandate. When the invited male was not able to participate due to scheduling conflicts, I invited another staff member, who happened to be female. I decided that at this stage and for this role, it was more important to make sure the departments and the longevity of experience represented were wider than the gender alone. Jenny, Megan, and Niki agreed to form the Core Group for the project, and we met ahead of the inquiry, on January 7, 2021 (see agenda, attached, Appendix A).

We already new that our topic would be about the onboarding process. I asked the Core Group to help me identify *what*, specifically, about onboarding we wanted to focus on, and shared with them some thoughts regarding the concepts of "words creating worlds" and the importance of our approach to a staff who can be a bit jaded about anything that sounds "touchy feely" or like lip service. We agreed that what we hope for is **excellence** in how we onboard, and that we really wanted this to stay focused on how we bring in **new** employees (rather than ongoing professional development or broader human resources topics), and they agreed on a positive topic of "Excellent New Employee Onboarding at MCLS."

Core Group members were given a handout with an overview of creating an AI paired interview guide, and I explained how I had come to my test version of the modified guide (see Appendix B.) During our Core meeting, we paired up and tested the modified interview guide and summary. The group gave me incredibly constructive feedback, including that two questions seemed repetitive to them and helped me to more clearly ask what I was trying to ask. This process helped the two who had no previous experience with AI to understand a little more about what this process would be, and got them excited, which I imagine helped when they reported back to their teams and encouraged their colleagues to participate and engage in the Inquiry. Our test and final Interview Guide and Summary Sheet are attached as appendices to this report (see Appendices C-1 and C-2).

The Core Group also was given a brief overview of AI as a field, the basic concepts of strengths-based approaches, and why I believed this process would be effective in strengthening our organization and our onboarding. I asked the Core Group for feedback regarding my plan for communicating with the larger participant group. They gave me insight into expectations of their colleagues and made suggestions for

language that would appeal to the group, as well as a goal deadline for what was reasonable to expect for pre-work and how far ahead to communicate details.

Finally, I clarified their role moving forward as full participants, advisors to me as representatives of their respective work teams, and as champions of the process. I asked them to be looking for opportunities to promote participation (although we had already had a wonderful initial response) and to keep their eyes and ears open during the process, as observers, for nonverbal and other cues I might miss in the busy-ness of facilitation. After our first Inquiry day, they emailed me anything they had noticed so that I could adjust for Day 2 as needed.

Discovery

Inquiry Part I

Due to our current COVID work-from-home state and our employees' ability to commit time to the project, the Inquiry was set to take place online over two mornings. One person had to back out the morning of, but 16 of us gathered on Zoom at 9am on Friday, January 21, 2021 (see agenda, Appendix A.) As my own team at work has extensive experience and comfort level with Zoom facilitation and we have learned that it takes more than one person to effectively run a high-quality virtual meeting, I had previously asked them to help with some "producer" roles to make the experience smoother. Gwen agreed to manage the breakout rooms, so I had sent her a list of breakout groups and timings. Jenny agreed to provide and share music for our gathering time and breaks. Lissa agreed to have an Energizer ready in case we needed it in the afternoon. All participants were sent an email several days ahead with an agenda (see Appendix A), a workbook to print and bring (see Appendix E), and the Zoom link.

After welcoming the group, running through our agenda, and objectives, and their roles as participants, I led the group in a modified paint chip icebreaker in which I shared a link to a paint company's website. Participants chose a paint color that represented their mood that morning and shared in Chat the color name and if they wanted to, why they chose it. Next, I asked them to keep their cameras on whenever possible in order to allow more full interaction, nonverbal expression, etc (which had already been asked ahead in their preparation email as well), and we established Agreements for how we would interact for the morning. I had prepared a list of agreements which I suggested, then gave space for participants to add anything they would like to suggest. After gaining visual agreement by thumbs-up, we moved into a quick explanation of roles in self-managing small groups and how we would use our virtual tools through this process. I gave a very brief overview of Appreciative Inquiry and the 5D process, including grounding us in where in the process we were jumping in and what my goals were to accomplish this first morning.

Discovery Part 1 – AI Paired Interviews

Ahead of the Inquiry day, I preassigned interview partners, in order to mix up departments and allow for a fast transition into the activity. Participants were given a very brief overview of the power of the Appreciative Paired Interview and time to review some tips and instructions in their workbook, and time was allowed for questions. They were then sent out to Zoom breakout rooms in pairs and given 45 minutes to complete their interviews and Summary sheets.

Discovery Part 2 – Identifying the Positive Core

They came back to the main room for instructions, then were sent out into small groups of two pairs to discover the positive core of MCLS' historical and current onboarding processes. They shared highlights of the interviews (specifically question 3, which asked for high point stories of excellence in onboarding that they were part of or observed, and questions 4 & 5, which spoke of past and present excellence and how that benefits staff and the organization), and all were to be listening for themes and "aha moments". Once the stories were shared, as a small group they discussed the themes and patterns they heard and came up with a list of "Themes from the Excellence in Onboarding Stories." Next, they chose the 5 – 7 themes that most resonated with them as a group, the themes/values/root causes of success/characteristics/practices that they wanted to see define our onboarding processes moving forward. I shared with them that themes could be things they heard repeated (common ground) or something they heard once but it resonated with all (higher ground.) We came back to large group and each reported out on their top themes. Group reporters were asked to email me their notes from this section, and all participants were asked to send me notes from their interviews and Summary sheets.

Group 1:
- Culture and community. Feel your integrated into the team
- Interactivity – not just one person – variety of willing people to work on the process
- Relationship building
- New employee feels like they are part of the global team. Like they can go to anyone with questions. Make them feel Extremely welcome!
- Onboarding is a step in the process. A continuum…interview, onboarding, training
- Use employee strengths to teach the new employees.
- Should be a standardize and flexible to meet people where they are at. Standardize – big picture (MCLS), Department – structured and flexible/not firmly scripted, but these are the things we need to know, Team plan onboarding
- Standardized process, continuity, intentional – HR person

Group 2:
- Connecting with people in other departments
- Value of an onboarding buddy - extending the onboarding so that it goes across several months (up to 1 year)
- Value of cultural expectations
- Value of the unspoken cultural norms (would be helped with having an onboarding buddy)
- Making sure there is consistency among departments/managers (org expectations)
- Management specific onboarding
- Setting up Onboarding norms

Group 3:
- Being able to ease in
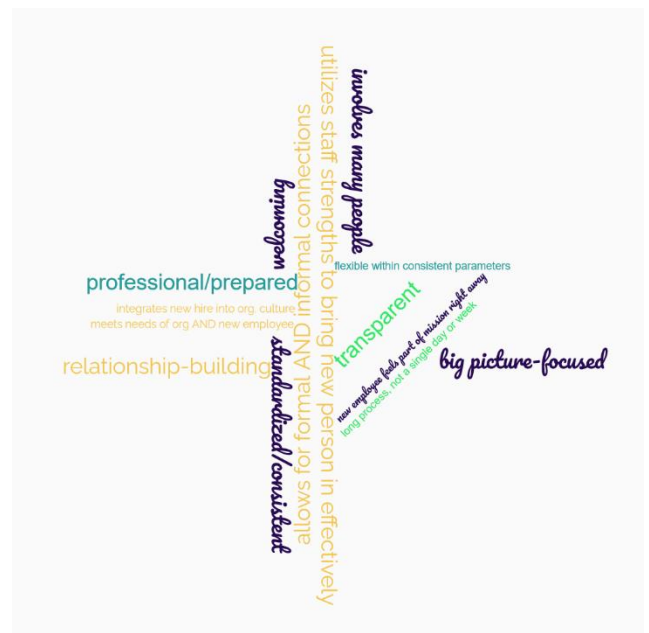
- Detailed, organized, **consistent** process (but with flexibility depending on role)
  - Staff having **welcoming time consistently**
    - **Both formal and informal connections** are really important
  - IT was **consistent** in deploying technology to new employees – meeting with Tessa helped people get to know her
- **Culture**: being made aware of it, but also being welcomed to it
  - Someone to explain work **culture**
- Janet was great!
  - Paperwork, questions…
  - People feel comfortable with her as a point of contact, a point of connection

Group 4:
- Standardized and transparent so that all know the process, have a checklist of what needs to happen for onboarding, transparent so that new hires and current employees all know what will be happening with the onboarding process
- Big picture- meet with all departments, helps to learn what each department/person does at the organization
- Mentorship- helps new hire learn the culture, makes them feel comfortable to go to their mentor to ask questions
- Checklist documentation- helps to know what needs to be done, consistency

Discovery Part 3 – Discovering Opportunities

After a break, all were given instructions and sent back out in the same breakout groups to discover their most desired opportunities to strengthen new employee onboarding. This time, they were asked to focus on questions 6 and 7 from the interviews, which brought forward their hopes for our onboarding moving forward, and where they see opportunities to grow. Again, they chose 5 – 7 themes they most want to see focused on as we examine and strengthen our onboarding to bring to the large group.

When we regathered, I led the group in an affinitizing exercise using Google Jamboard, a shared whiteboard with post-it notes. Once we had all themes captured on sticky notes (we had 25), I explained the concept of affinitizing and asked for a few volunteers to help move them into groupings that seemed to "go together". Once we had landed on agreement for five groupings, as a large group we drafted category names. I explained that we didn't need to wordsmith at this point, but that we wanted to be sure we were all on the same page with what each grouping was. Our final Jamboard is shown here:

Excellent New Employee Onboarding at MCLS

Reimagining Onboarding

Building a longer onboarding process w/ touchpoints over a year

Relationship Development

Relationship building – More direct interaction w/ all staff

Including things that focus on building relationships

Conversations with how people fit in organization

Emerge with a solid understanding of org, employee has as relationship w/ MCLS & how employee can "foward" MCLs

Standardizing Onboarding Process

Different/Expanded process for managers

Conversations with how you fit in with culture

Include time for meeting people both formally & informally across org

Organizational Cultural Immersion

HR Point Person (continuity/consistency)

Making sure everyone feels welcome (do something for all new staff)

Intentionally infusing "fun" of our culture in everyday interactions (fun activities, ex. vTiger Bingo)

Consistency

Standardized onboarding

Standardized yet flexible process

Making people feel welcomed

Share org values & norms in onboarding

Cross-training (esp. Managers) on onboarding process (succession planning)

More organized/standardized process - checklist

Mentorship Process

Mentor – have a process to become a mentor

Having someone in department be your onboarding "buddy"

Have a mentor

Importance of having time to explore on your own

Consistency

Standardized process (include big picture as well as training details)

Reimagine IT onboarding process

Dream – Vision Statements & Creative Presentations

In order to move us forward from categories into dreaming of our preferred themes and opportunities as if they were already achieved, the group was given instructions to go into new small groups and write Vision Statements. They were given instructions in their workbook and verbally about creating a statement that used the themes we had emerged with (see visual above) and was desired, bold and provocative, affirmative, and grounded. Once they had their statements, they would also need to plan a creative presentation of those visions to the rest of the large group. This could be anything they could dream, and I asked them to try to have fun, acknowledging that the word "creative" can be intimidating. Their workbooks had some optional ideas to get them started, but they were encouraged to stretch themselves and be limited only by their imaginations.

At this point, we were a bit behind schedule, so I explained that we would start our Dream process, and that I would check in with each group to see how timing was going and adjust as needed. The plan was to come back together, present their visions, and enrich the vision through capturing things in the presentations that resonated with them before wrapping up with my commitments to them and expectations of them before we would meet next a week and a half later. However, on checking in with the groups, it was clear that rushing them would not allow their statements to be as effective and that they would not accomplish creative presentations within the time we had left, so I shifted and asked them to complete just their vision statements, and that we would pick back up in these same groups to plan their creative presentations when we met next, to which I saw visible signs of relief.

Back in the large group, I thanked our Executive Director and management team for allowing us to pursue this Inquiry, and each of them for giving their time and bringing their perspective and energy to the process. We took a group photo (allowing those who were not comfortable to turn their cameras off) and I reminded them what I needed from them (notes from several activities) and by when. I promised to get

them an agenda ahead again for the next session, and reminded them to make sure they had the next session on their calendars. Jenny played us out with high-energy music.
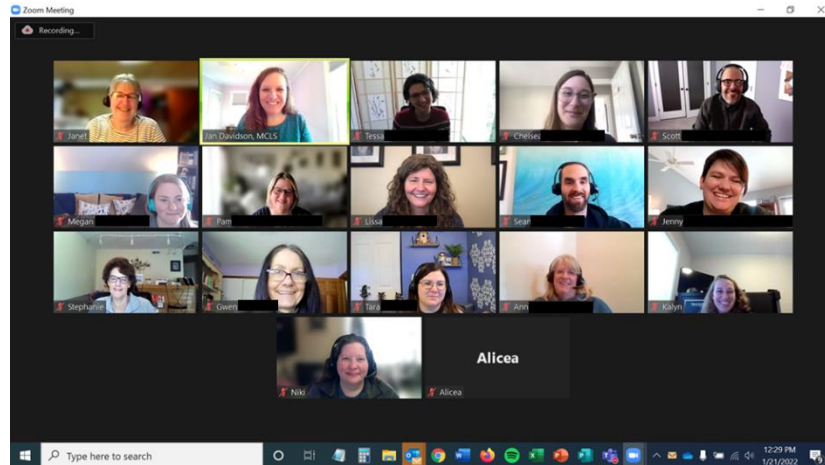
Between sessions, I collected and compiled all of the notes. I tweaked their Focus Area names slightly to reflect what I heard them saying, and put together Context Information Sheets for each of the five focus areas that we were choosing to move forward with (see Appendix F.) I asked participants about which areas they most wanted to work further on, requesting that they send me their first, second, and third choices, but letting them know that everyone would be able to contribute to all areas. I was pleased that I was able to form five groups in which everyone was placed in their first or second choice area. I was planning to let them know their groups and review the context information ahead of the session, but since we were going to continue Dream, I decided not to so that we stayed where we were in the process, mentally, rather than jumping ahead. A snow emergency in Michigan caused us to have to reschedule Part II, which was disappointing, but the fact that fifteen of sixteen made the new date work (and the 16th was disappointed but out of state on a family vacation) was a testament to the energy generated in our first session and the participants' commitment to being part of this Inquiry.

Inquiry Part II

We met for Part II on Friday, February 11 with upbeat music and a slide of inspiration taken from their own words in the notes about the importance, beauty, and power of quality onboarding:
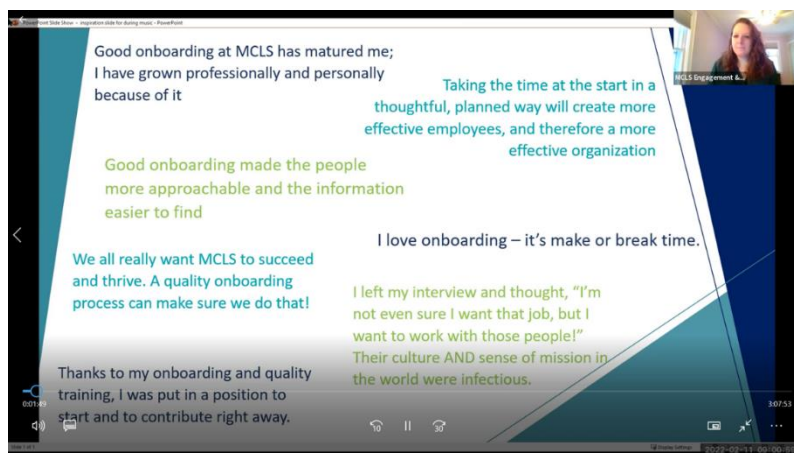
We began by reviewing our agenda and Agreements and with a yellow-blue-green visual energy check. I asked participants to share one word in Chat that described how they were feeling coming off Part I and heading into Part II:

> AMPED   Forgetful   Ok   GO!   Good   Excited   good   great   Jazzed!
> Interested!   Qdoba *(haha, this was a nod to the lunch gift cards I sent them as a thank you for participation, since in an in-person session we would have provided lunch)*   ready   optimistic   Optimistic   I made it 😊

After grounding ourselves in where we had been and where we were jumping back in, I sent them out to their Dream groups from last session to plan a creative presentation of their Vision Statements, then they came back and presented them to the group. Each person captured notes (to send to me later) about what resonated for them from each presentation. As previous experience had me expecting, the presentations did not disappoint! The groups were so varied and creative (including beat poetry, haiku, a public radio advertisement for MCLS, and a call-and-response cheer), and there was a lot of laughter and some really strong statements I can combine for our organization:

At the Midwest Collaborative for Library Services, we have an onboarding process that is consistent, intentional, affirmative, enjoyable, and welcoming. It includes standard practices, including fun, and creates satisfied, confident, knowledgeable, equipped, connected, supported, invested employees who passionately support each other, the organization, and the libraries we serve.

When a new team member joins MCLS, they are welcomed by a structured process with time to digest information. With the leadership of a mentor, MCLS onboarding allows them to build relationships and immerse themselves in the culture in an exciting, uplifting, and empowering way.

MCLS exemplifies flexible onboarding with a world-class process that focuses on organizational culture and relationship-building with the goal of feeling wholly integrated into MCLS.

Our new onboarding strategy at MCLS considers new employees as whole people. In order to make them feel welcomed and prepared to successfully serve libraries, we lead them through a structured orientation process, cultural immersion, and mentorship program.
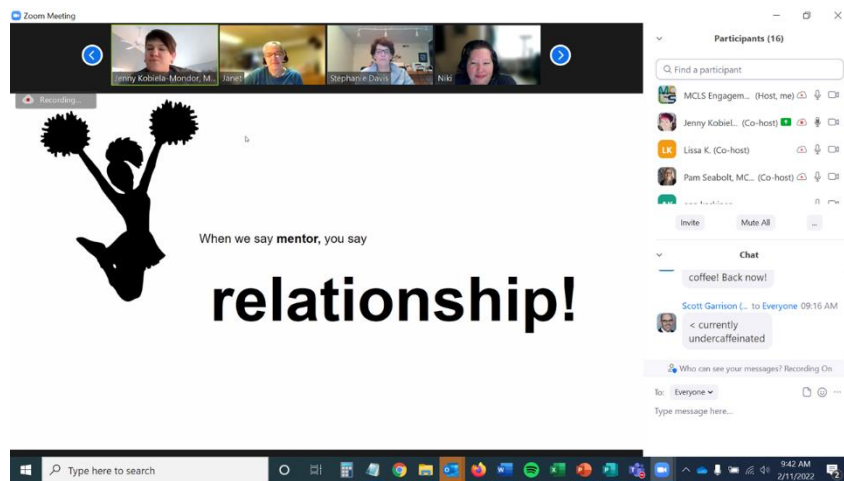
Capitalizing on the energy in the group, we jumped right into our next D's.

DESIGN/DELIVER/DESTINY

Because I know (as a member of this staff) that our employees can be very frustrated by anything that appears to be "lip service" where they are asked a question but "nothing" comes of the answer, I was very careful to explain several times through this process what realistic expectations I had for the outcomes. We wouldn't be doing the work of creating concrete processes; we would be exploring questions to advise WHAT processes we'd like to see. I really wanted to help create a balanced space for dreaming big while not getting discouraged when action didn't happen immediately in a short, two-morning process. It was not even within our group's purview to make decisions about what exactly will happen. The desired outcome of this Inquiry was to allow all interested staff a voice to co-create *recommendations* for what excellent onboarding would include and start envisioning how we should work on achieving it, and then to allow me to present that to our management team. The hope is that, with their approval, some working committees will form soon, so it was important to not get ahead of ourselves into too much of the weeds of Deliver/Destiny.

To work through Design and the beginning of Deliver/Destiny, I decided to have new small groups work through three activities, each group discussing one of the five Focus Areas identified. The five areas of focus MCLS's staff decided to consider were:

> Focus Area 1: Reimagining & Designing Onboarding at MCLS
> Focus Area 2: Organizational Cultural Immersion
> Focus Area 3: Standardizing Onboarding Processes
> Focus Area 4: Relationship Development
> Focus Area 5: Mentorship Program

Groups were pre-assigned to allow them to work on what they were most energized by (and keeping the three participating managers spread out rather than all in one group), and they were given time to individually review a Context Sheet about their area of focus (see Appendix F.) These sheets were created by combining notes I captured from the Paired Interviews and Summary Sheets, Positive Core, and Opportunities from Inquiry Part I. I chose a metaphor of Roadmapping and, because I love a theme to play with, really leaned into it. This Roadmapping theme played into keeping the participants cognizant of the fact that we are on a journey to strengthen our onboarding and ensure its excellence, but that it will be just that – a *journey*, long and potentially winding, with steps along the way.

We worked our way through Activity 1: "Down the Road" (looking at the benefits to the new employee and the organization if MCLS puts effort and intentionality into the given Focus Area), Activity 2: "Driving Day to Day" (brainstorming activities and recommendations for implementation of effort on their chosen Focus Area, including some recommendations about timeline), and Activity 3: "Rearview Mirror and Recalculating to New Paths" (starting to ask questions about what an evaluation/measurement plan for this Focus Area might look like and encouraging them to think with flexibility toward adjustment as we go along the road.) (See Appendix G) At various points, we came back together and the groups shared out pieces of their work, and time and space were allowed for others to ask questions, clarify things, or add to the work. Participants were told that they would all have access to the Google docs we worked on for three days past our Inquiry, in case they wanted to add anything to the other topics.

Near the end of our time together, we held an Asks, Offers, & Invitations session in which participants were first given quiet reflection time to consider their own commitment to moving this work forward, what skills and strengths they have personally to contribute, what they would like to see from management or the staff, and what strengths and skills they've noticed in their colleagues through this process (see reflection questions on the slides in Appendix D-3.) As a large group, all were encouraged to share out loud any Asks of the group, Offers they would like to make, or ways they would like to Invite others to step up, and I noted these down to include in the Recommendations Report to our management.

I committed to the group that I would be working on the Report, and that I would share it out to the participants first, with three days to react to it before I sent it on all of their behalf. We again took a group photo, I thanked them all, and once again, Jenny sent us forth with an upbeat dance party.

Our schedule moving forward is that I will complete a Recommendations Report to the management team by early March and will present a brief overview of the process and report to the full staff at a regular staff meeting in mid-March. By the end of that month, the management team will respond to me and I, along with a few staff members who offered, will champion the forming of working committees for the Focus Areas that are approved to move forward. Each committee will have a chair and all staff will be invited to join a committee if they would like to. I will commit to providing some suggestions of structure and process to help get those committees going. Because the five areas are varied from one very specific program to some that are much broader, each committee will work on its own timetable and process.
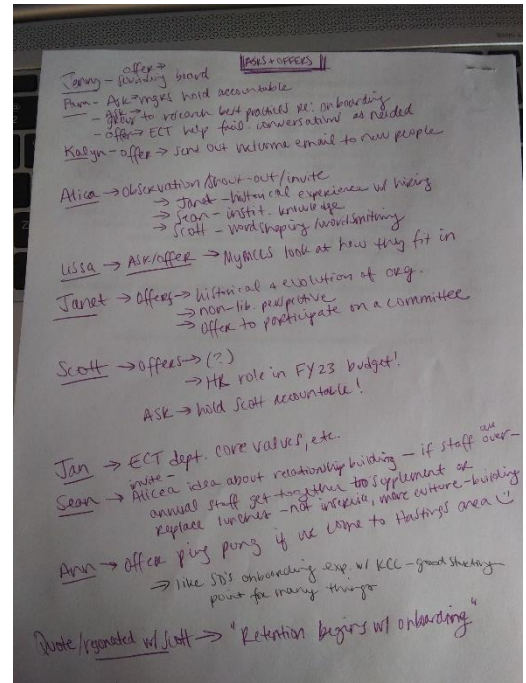
Facilitator's Reflection

Overall, this Inquiry project has been an incredibly fulfilling, meaningful, and lifegiving process for me. Not only did it push me to really dig into some of the AI principles and methodologies beyond the ones that we've been using in our other work, but it energized me by truly contributing to my own organization's success. It was not a surprise that workplace culture was brought up in this process over and over; our organization is struggling on this topic, and I myself am personally. Two major factors – a change in leadership and a global pandemic causing us to work from home for the past two years, creating a much more siloed environment – have brought us to this place, which was becoming one of doom and gloom and a loss of hope for improvement. From the phenomenal response to the invitation to participate in this Inquiry (including those who have been fairly negative about our organization of late AND some who are incredibly skeptical about Appreciative Inquiry) to the energy during the sessions, to the commitments brought forth at the end, my own excitement and expectations for what could come for MCLS in the next phase of our evolution was highly elevated. It thrilled me to hear some of the biggest skeptics ("I'll participate to help you, but I have little hope in change…") leave the second day of the Inquiry with words about how fun it was, how fast the time flew by, and making public commitments to be part of whatever comes next, even while that "what" is still really nebulous. Several people made the effort to reach out in the days after the event with additional thoughts they'd had and wanted captured, which reinforced to me that this goes beyond our staff supporting each other in doing a project and is truly work they feel is worth continuing. Our Executive Director, who participated in the Inquiry, stayed on at the end of the second session to thank me for facilitating and to share his own excitement and hopes that this could lead to amazing things for us. For my own part, an initiative I've been trying to get going (and others have as well) for more than two years but without the vision or time to do anything about it (creating a mentorship program for new hires) has gained traction, and I can't wait to see what will happen. Even in a very busy time for my own team, I'm mentally recommitted to strengthening our onboarding; eager to see what attitude, culture, and retention changes that brings about; and psychologically boosted by feeling part of a team that wants this change.

What did I learn?

As the facilitator, this particular project being for our own organization had its challenges – I had to sometimes take off or put back on the multiple hats of staff member with a vested interest in the topic and success and facilitator with some clarifying distance. It also lends itself, though, to being easier for me to continue to support the work moving forward. As a staff member, and with the support of my own manager, I will be able to create an intentional, ongoing check-in process with the working committees and continue to act as representative of the staff's perspective to the management team. My personal interest in the topic and hopes for positive change should keep my commitment strong amidst a busy schedule. My desire to have this feel like a particularly successful experience for the participants (that something CAME of their work) will spur me to step outside of my own comfort levels and ask provocative questions when they need to be asked. As part of my Recommendations Report, I am creating a structured reporting process from work committees and management to all staff, to create accountability as we move into the next months and years. This process will include me meeting with each working committee chair and new employees that may be hired to gather stories of success and find ways to share those. I am also committed to continuing to help advise on reporting-out processes in order to keep them appreciative and celebratory, building on strengths rather than turning into problem-solving.

For several reasons, some more conscious than others, I structured the Dream phase such that we actually began Dreaming with the Vision Statements (rather than images), then presented them creatively, which may or may not have included images. This was partially because of tight time restrictions, partially in trying to make it more palatable to some of our staff with a bit more practicality rather than "dreaminess," and partially subconscious as I looked back at examples of inquiries I've been part of and melded the process with other tools we've used for other processes, such as strategic planning. While it worked out all right, I do think that starting them with creating images FIRST, THEN moving into writing their provocative propositions would have been more effective at this point in the process. Some groups did fine, but two got a bit stuck on wordsmithing, and starting with creating an image of their Dream may have helped break them out of that mindset, helping them to truly *dream* and use creativity rather than simply *think*.

Principles of Appreciative Inquiry

Reflecting back on this Inquiry experience, I am pleased to see all of the AI principles at play in at least some small way. Right away, I think the Poetic Principle was present in creating our positive topic. As the Core Group and I discussed what exactly it was about onboarding we wanted to look at (being the model? excellence? professionalism?), we recognized that the topic we chose, the focus we created for the group, would matter. I have truly bought into the concept of, "words create worlds" and use the phrase often, and so I tried to really keep this in mind throughout the planning and facilitation process. For example, I know that we have several staff members who are skeptical of "the whole AI thing" and sort of roll their eyes as soon as anything seems too "touchy feeling" or "hippy-dippy." For those reasons, I tried to choose my words carefully and focus on the proven outcomes of the strength of AI and even when I used a word like "dream" I counter-balanced it with "imagine, think about, what do you WANT to see?" I worked hard to do my best (knowing they still had choice in the matter, too) to encourage them to open their minds a bit by not "scaring" them or pushing too hard outside of comfort zones too fast. At the same time, I knew that for this to work and coming from a place of low morale in struggling onboarding and culture, I needed to model and be sure the work *did* use positive words and focus on strengths and opportunities. This, of course, also led into the Positivity Principle as we found opportunities and positive steps forward through a focus on the positive rather than on gaps or weaknesses. In looking to find the positive core of onboarding when it is excellent and figuring out how to build on that, we put this principle into action. The Simultaneity Principle showed up in opening the Paired Interviews with an introduction to each other's roles and how they fit into the organization and their hopes for the Inquiry. I believe this started right off the bat to focus on hope and positivity, even for those most skeptical. The notes shared seem to back this up for me – rather than jump right into "work" or even "what isn't working", starting with hope created a mindset that we would be speaking positively and striving for more hope, more positive change, growth. I saw the Anticipatory Principle at work in how participants showed up for the second session. By leaving them dreaming of preferred futures and knowing they'd be picking up there, they ALL (except one gone on vacation) made the rescheduled date work, showed up, and came ready and hopeful. Gone was any defensiveness; in its place was a group of people who had spent the three weeks visioning, hoping, and working to start behaving positively NOW rather than waiting for some future time. We have a new job being ready to be posted, and I heard staff speaking about their hopes that the new person will be onboarded successfully, rather than bemoaning our lack of processes. They could see the preferred future and were beginning to bring positivity, rather than apathy, to the present.

I think the principle that stands out the most for me through this process is the Wholeness Principle. It was crystal clear to me that in order for this to feel successful and trustworthy to the staff, it was vital that all teams be represented, that the group include long-time *and* short-term employees and everything in between, and that as many individuals as possible participate. This was shown to be true as staff members respectfully added to each other's work by bringing to light ways things might affect their work differently, as managers who didn't participate shared their own excitement after hearing from their team members, as staff who didn't participate shared their trust in their teammates protecting their interests, and as individuals thanked me for allowing their unique perspective to be heard. We are a small enough staff with really specific roles and not much duplication, so it was important to hear from the organization as a whole in order to bring out all of the best knowledge and experiences and help all trust that their voice and how change would affect them was considered.

As I entered into this project, I hoped to make a difference for an organization I care deeply about. I'm so happy to report that I feel this is coming true, although I need to remember that change happens slowly and incrementally. I also hoped, as a side benefit, to "convert" some of my colleagues' thinking about Appreciate Inquiry as a philosophy and practice. As I have focused more and more of my work and time (and even personal time approaches) on this important field and have started to internalize some of the practices and tools, I have seen the effect and want it for those I care about.

One thing that was not new information about myself, but that was reinforced through this process, was that I have a much easier time facilitating for strangers than for my peers/colleagues. While I still want the best for those I serve through facilitation, it is easier for me to disengage from taking things personally, particularly when I don't have a vested interest in the outcomes other than wanting success for all. And while I'm a classic people-pleaser and want to be liked by everyone, that is only a stronger need to have to let go of when I will have a continued interaction and future with the members of the group. It was also reaffirmed to me that I need to give more time to things than I expect they'll take. I have a tendency to be afraid of ending early and then actually running over or not completing everything. I learned that in my work with AI Inquiries, I need to pause often, take a deep breath, and slow down; I continually found myself getting ahead of the process, wanting really specific outcomes much sooner than was realistic to the process. I needed to reevaluate what "success" meant in this case in order to guide participants to that success, rather than coming up "short" or simply not having the time to complete things. The value of allowing time to have others give me feedback on my plans ahead of time (testing the interview guide, asking colleagues like my project mentor or my manager who has AI experience to give me their thoughts on my activities or schedules, etc) was certainly experienced here. I am working to move from seeing this as a weakness to leaning on the tools available to be the best I can be, for the people I'm facilitating for. I will continue to use as a mantra a phrase that has become my favorite to say to others since beginning my AI learning journey about four years ago – "trust the process."

My favorite thing about this entire Inquiry process was to see the seeds of positive change for our organization taking root. While I know it will take time for those seeds to sprout and grow, the sense of positivity is overwhelming. I can't WAIT to see where it leads us!