

Virtual AI Facilitator Practicum Report

By Sally Loftis

The Center for Trauma-Resilient Communities (CTRC) is a nationwide group of dynamic consultants that train and advise organizations and communities on building trauma-informed practices. The business was founded in 2018 as an outgrowth of [The Sanctuary Model of Care](#) and growing research about trauma resilience in youth. CTRC grew quickly as the demand for this work skyrocketed with the increased research. Exponential growth created a need to hire and onboard additional trainers and consultants. I was hired as a consultant to help the group in building these processes.

The timing of this work was also critical in the wellbeing of the business. The COVID-19 pandemic upended the group's typical and regular work in person. Additionally, CTRC was being asked to also address racial trauma in their training, as a response to the police brutality protests and racial awakening happening in the United States. The team was feeling the pressure of change and heaviness of their clients in navigating the exacerbated traumas of the pandemic and racial awakening. This was the perfect opportunity to use Appreciative Inquiry.

I folded AI work into every element of this project. I worked with a core group to **Define** the topic for the greater team. I used stakeholder interviews with a **Discovery** guide to build momentum toward co-creation. With the help of AI Facilitator Erin Hall, we conducted an AI Summit to continue the **Discovery** and complete the **Dream** phase. Then the core group integrated the work of the AI Summit into recommendations for the **Design/Delivery** phase.

The *Constructionist Principle* was introduced early on with the workgroup in establishing this work as co-creation. The *Principle of Simultaneity* was front and center as the core group worked through questions as interventions. The *Anticipatory Principle* was practiced consistently with the core group through imaging exercises and a collaborative vision Jamboard. The *Poetic Principle* helped the core group to focus its attention on possibility and community. The *Positive Principle* changed the mindset of the group from dreading this work to anticipating the time together. The *Wholeness Principle* was manifested through creative practices, such as journaling, musical reflection, guided imagery, and virtual collaboration.

I'm excited to share this work with you.

Sally Loftis

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Virtual AIFT August 17-28, 2020 - Facilitators: Jeannie Cockell and Cheri Torres

The [Center for Trauma-Resilient Communities](#) (CTRC) helps organizations to embed and embody the science of trauma resilience. CTRC works nationally with leaders to build a trauma-responsive and trauma resilient culture which helps to decrease burnout and turnover, increase compassion and accountability, and improve overall organizational health and effectiveness. The organization is headquartered in Winston-Salem, NC, with a nationwide assortment of staff and contractors.

The Center for Trauma-Resilient Communities contacted Loftis Partners to help with Human Resources Processes in regards to the capacity building in the Center's strategic plan. After speaking with CTRC Executive Director, Loftis Partners identified the following project deliverables:

- *Responsibilities and skills-needed/qualifications for new CTRC positions (faculty, consultant, etc.)*
- *Capacity determination process (how many people do we need for what jobs and when)*
- *Candidate review process (once they have entered through the Crossnore HR system)*
- *Decision-making matrix for how decisions will be made around capacity needs & hiring*
- *Onboarding process for new employees in addition to Crossnore standard plan*
- *Skill-building plan for employee growth and promotion*

CTRC and Loftis Partners agreed to a six-month contract for this work, including the use of an Appreciative Inquiry approach with a **Core Group** and a virtual **AI Summit** with the entire CTRC Team. The project timeline was August 2020-January 2021.

DEFINE

A **Core Group**, or AI Learning Team, was established in September 2020. In addition to Sally Loftis as a consultant, the CTRC members included a representation of business development, program delivery, and administrative support. The following stakeholder interviews were conducted before the workgroup meetings began.

- Executive Director
- Co-Founder and Faculty

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- Co-Founder and Senior Director of Program Development
- Chief Human Resources Officer
- Director of Human Resources
- Director of Business Development
- Program Coordinator

I modified the Generic AI Interview Guide for the stakeholders as an intentional intervention on my part. The questions for these interviews were used to introduce an AI approach as the project started. I used questions focused on “highly effective onboarding” to gauge the experience of the core workgroup. Below are the questions:

BEST EXPERIENCE: *Tell me a story about the best times that you have when onboarding with a new team (Ex. Sports team, workgroup, social group, new neighborhood, etc.). Looking at your entire experience, recall a time when you felt most alive, most involved, or most excited about your involvement. What made it an exciting experience? Who was involved? Describe the event in detail.*

VALUES: *Let’s talk for a moment about some things you value deeply; specifically, the things you value about yourself; about the nature of your work; and about this organization.*

A. Without being humble, what do you value most about yourself – as a person and as a member of this organization?

B. When you are feeling best about work, what about the task itself do you value?

C. What do you value about the organization?

D. What is the single most important thing that your organization has contributed to your life? To the world?

CORE VALUE: *What do you experience as the core value of your organization? Give some examples of how you experience those values.*

THREE WISHES: *What three wishes would you make to create a dynamic onboarding process for new employees and contractors?*

The following themes arose from the stakeholder interviews, which informed the work with the Core Group.

Infrastructure: *the organizational structure and processes that embed and embody a trauma-resilient workplace culture*

- Solid, clear infrastructure
- Clarity
- Timeliness

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- Organization
- User-designed process
- Business plan with financial information

Connection: *a community of trauma-informed practitioners where compassion, renewal, growth, creativity, and accountability are celebrated.*

- Build a sense of connection and belonging
- Consistent process that everyone follows
- Get people in person
- Leadership all feels committed and valued
- We all speak the same language
- People need to experience the curriculum

Integration: *a collaborative network of national partners that reflect the communities we serve as CTRC and parent organization (Crossnore Communities for Children – CCFC)*

- Thought and expert partners to create a consultant institute
- Integration with CCFC onboarding process
- Need more diversity
- Ability to grow because we have national capacity and expertise

The **Core Group** met 10 times over the course of 5 months. The initial meetings were designed to introduce and practice the AI process before we used it with the entire CTRC team in an AI Summit. We used regular practices of community meetings, journal, music, creative reflections, and closing check-ins.

Meeting #1 (September 18, 2020) - We reviewed the project deliverables and introduction to AI as the positive core of the project. I shared the stakeholder interview themes and asked the participants to journal about their thoughts, add an image to a shared Google Jamboard to represent their thoughts, and then reflect on each other's contributions. This practice became part 1 of the Dream process.

9/18/20 Dream Instructions:

1. review the answers
2. journal your thoughts
3. share an image of what you see here (click on add image to the left to load a picture from your computer or search the web)

Photo: Screenshot of Google Jamboard core group work (Dream journal)

Meeting #2 (September 25, 2020) - We discussed the core group's thoughts since last week's dream journal. Then we dove deeper into the constructionist and wholeness principles. I walked the core group through a modified guided image exercise from *Appreciative Inquiry: Change at the Speed of Imagination* by Watkins, Mohr, and Kelly.

"Get comfortable, close your eyes if you like, and bring the chosen topic of capacity building into your mind. Imagine that capacity building in all its forms has been implemented fully in your everyday life and work. Imagine that it is your first day back at work and you are excited because you know that you'll find a workplace that has more capacity building present. Wander around your home office or virtual workplace. As you see and talk with people in the course of a day, what pictures emerge that are life-giving and energizing? What are you feeling? What are people doing differently? As you finish your day of work, what is life like and how has it changed? What conversations do you have with those in your inner circle of life? What do you tell them about the changes at work? Congratulate yourself for being a part of such a healthy and meaningful change in your work and in your life. Open your eyes and return to this space at your own speed. When ready, journal for a few minutes to describe your experience."

The core group then worked on a possibility statement individually and together on a Google Jamboard. I gave the expectation that this part was continuous work. Finally, the group moved into a Design/Delivery discussion around immediate needs for current CTCRC contractors and long-term needs for new CTCRC employees and contractors. I used the imagery of two moving trains to reflect the pace of work. The bullet train was an immediate need to welcome and connect a current set of CTCRC contractors as soon

as possible. The wine country train was a long-term need to onboard and sustain a growing network of employees and contractors.

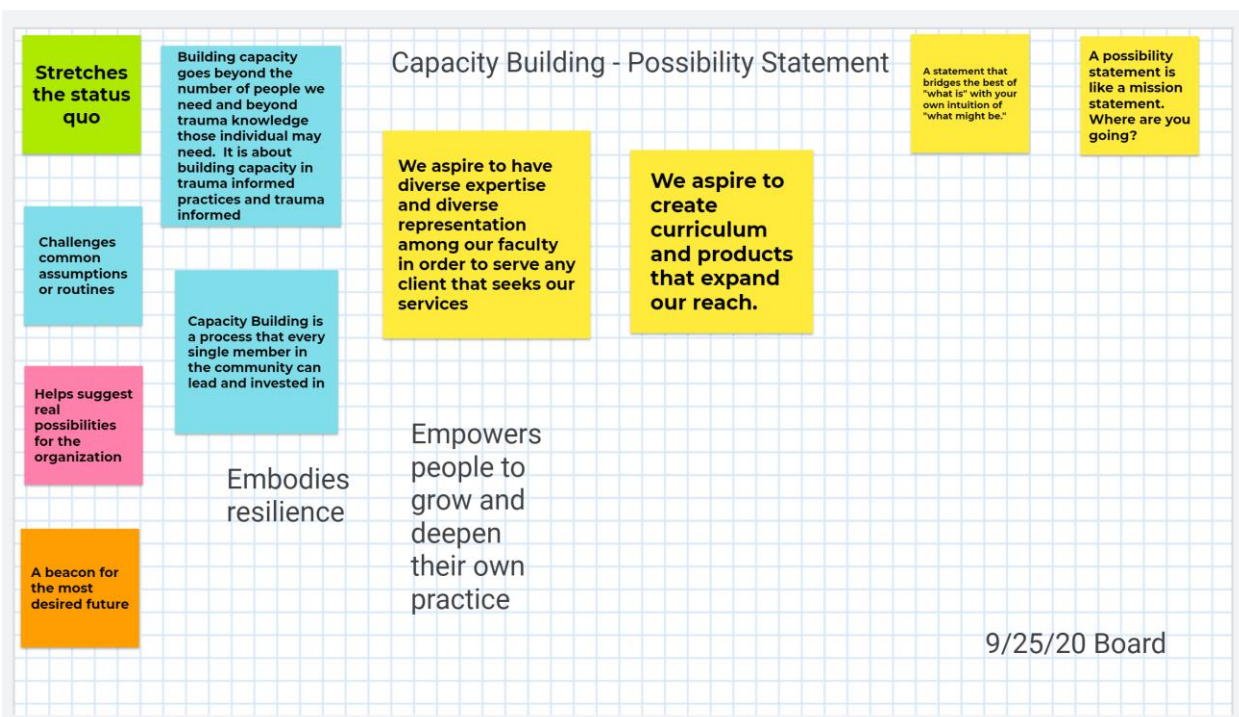


Photo: Screenshot of Google Jamboard core group work (possibility statement)

Meeting #3 (October 9, 2020) - The Core Group worked on **defining the topic** in this meeting by discussing the difference between capacity building and onboarding. I used the same Google Jamboard for documenting this work. The core group defined capacity building as inclusion of curriculum development, expertise, evaluation, marketing, and financial & technical capacity. In our discussion, onboarding was defined as hiring the needed talent and bringing them onto the expanded team in a successful and sustainable way. The group decided that the topic was onboarding. One of my virtual AIFT facilitators, Cheri Torres, helped me with the wording for our topic - *ease in finding and retaining talent*. Finally, the group began work on a welcome session for current contract consultants and new employees. As a side note, I worked with the Executive Director and Co-Founders separately to help them with resource allocation as part of my consulting work with the Center for Trauma-Resilient Communities.

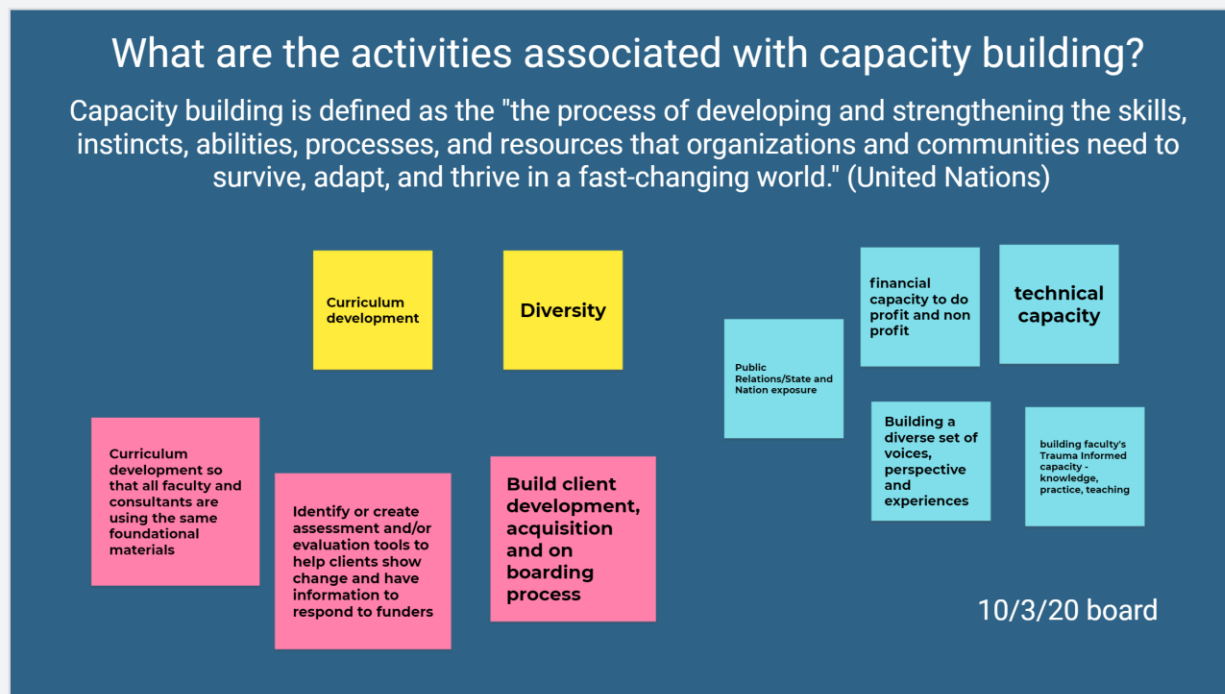


Photo: Screenshot of Google Jamboard core group work (capacity building)

Meeting #4 (October 23, 2020) - In this meeting, I introduced my co-facilitator for the upcoming AI Summit. Erin Hall attended the same vAIFT training as I did in August 2020, and we decided to help each other in a work exchange for our practicums. Since Erin was new to this core group, we completed a team building exercise together. Then we finalized the date/time and agenda for the welcome session and the date/time for the AI summit.

In between workgroup meetings, Erin and I worked on an AI summit agenda for a virtual 2-hour gathering. This format as selected as the Core Group was focused on the **Define** and **Design/Delivery** phases. The AI summit with the entire CTRC team would focus on the **Discovery** and **Dream** phases. And the client only committed to a 2-hour summit.

Meeting #5 (November 13, 2020) - We reviewed the work we had done so far alongside the project deliverables. Then I asked the core group to take 5 minutes and reflect on our core group process so far. The questions included:

- What has been working well?
- What clarity have you gained in the last two months?
- How are you showing up in this workgroup?

Participants shared their answers on the same Google Jamboard that we used in our previous meetings together. Then the core group debriefed the welcome session, which had taken place the day before this meeting, with Erin. Finally, Erin and I shared the initial agenda for the AI summit.



Photo: Screenshot of Google Jamboard core group work (reflection activity)

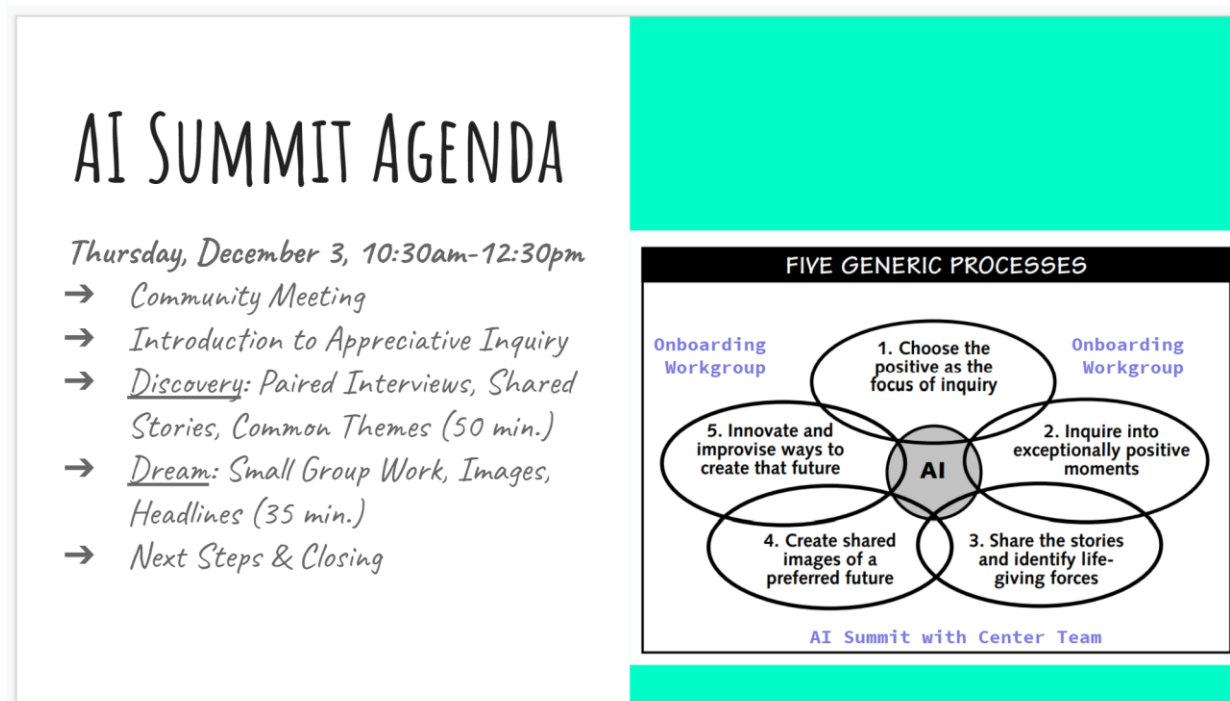


Photo: Screenshot of Google Slides describing draft AI agenda and process work

DISCOVER & DREAM

AI SUMMIT - December 3, 2020

In between workgroup meetings, Erin and I finalized the AI summit agenda for a virtual 2-hour gathering. We used Zoom for the meeting, a Google Jamboard as a virtual working space, and a Google Slides deck to visually guide the meeting. Erin and I rotated the facilitation and technical responsibilities throughout the summit. First, we introduced ourselves and discussed our affiliation with each other through a Pepperdine University graduate program and virtual AIFT.



Photo: Facilitator introduction slide

Then we completed a group check-in process. Our client has a practice of using specific check-in questions in each meeting, so we used those in a creative way on Jamboard. We added the question: What is one word that describes team to you?



Photo: Group check-in on Jamboard

Then we moved into an overview agenda for the summit. In Erin's previous experience with AI facilitation, she shared a step-by-step agenda that resonated with audiences.



Photo: Agenda for 12/03/2020 Summit

The next section was devoted to an AI overview. The attendees had heard of Appreciative Inquiry, but this was their first time going through a detailed AI process. When I introduce AI, I describe deficit-based thinking as a dominant culture practice. AI allows us to access and celebrate our strengths, which is a non-dominant practice.

APPRECIATIVE INQUIRY

APPRECIATIVE INQUIRY (AI) IS AN ORGANIZATIONAL CHANGE PROCESS BUILT ON HUMAN STRENGTHS AND CREATIVITY.

AI HAS AN EMERGENT DESIGN WITH NOMINAL STRUCTURE THAT ALLOWS THE INSIGHT OF PARTICIPANTS TO SURFACE AS A WAY OF CO-CREATING A FUTURE TOGETHER.

Recurring Patterns

- ✓ What we believe influences our social reality.
- ✓ What we pay attention to influences our beliefs.
- ✓ What other people say and believe influences our reality and vice versa.
- ✓ Positivity is essential for life and growth.


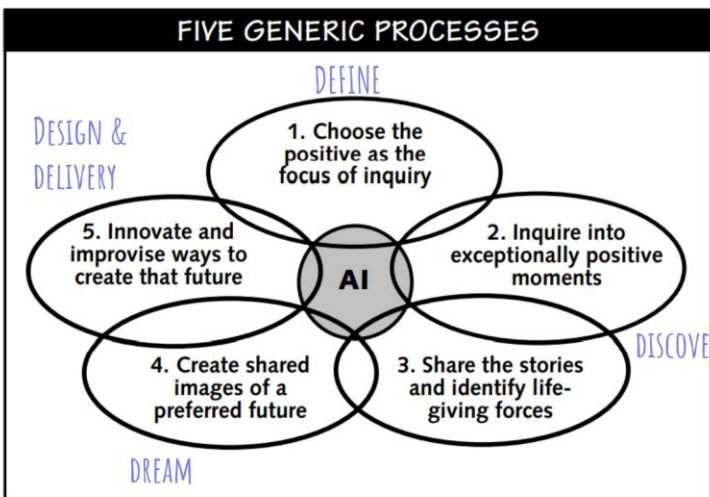


Photo: Slide 1 for AI Introduction

THE AI PROCESS AND PRINCIPLES

FIVE GENERIC PROCESSES



- **The Constructionist Principle:** Our organizations evolve in the direction of the images we create based on the questions we ask as we strive to understand the systems at work.
- **The Principle of Simultaneity:** Change begins the moment we ask questions.
- **The Anticipatory Principle:** Our behavior in the present is influenced by the future we anticipate.
- **The Poetic Principle:** Just as poets have no constraints on what they can write about, we have no boundaries on what we can inquire and learn from.
- **The Positive Principle:** The more positive the questions used to guide a change process, the more long-lasting and effective that process will be.

Photo: Slide 2 for AI Introduction

Considering the virtual nature of the summit, we provided a shared Google document with the interview guide. This was provided while giving instructions for the interviews. We asked participants to capture answers and thoughts from the interviews on a separate piece of paper. We also used a couple of minutes to make sure that participants could access the shared document and understood the instructions.

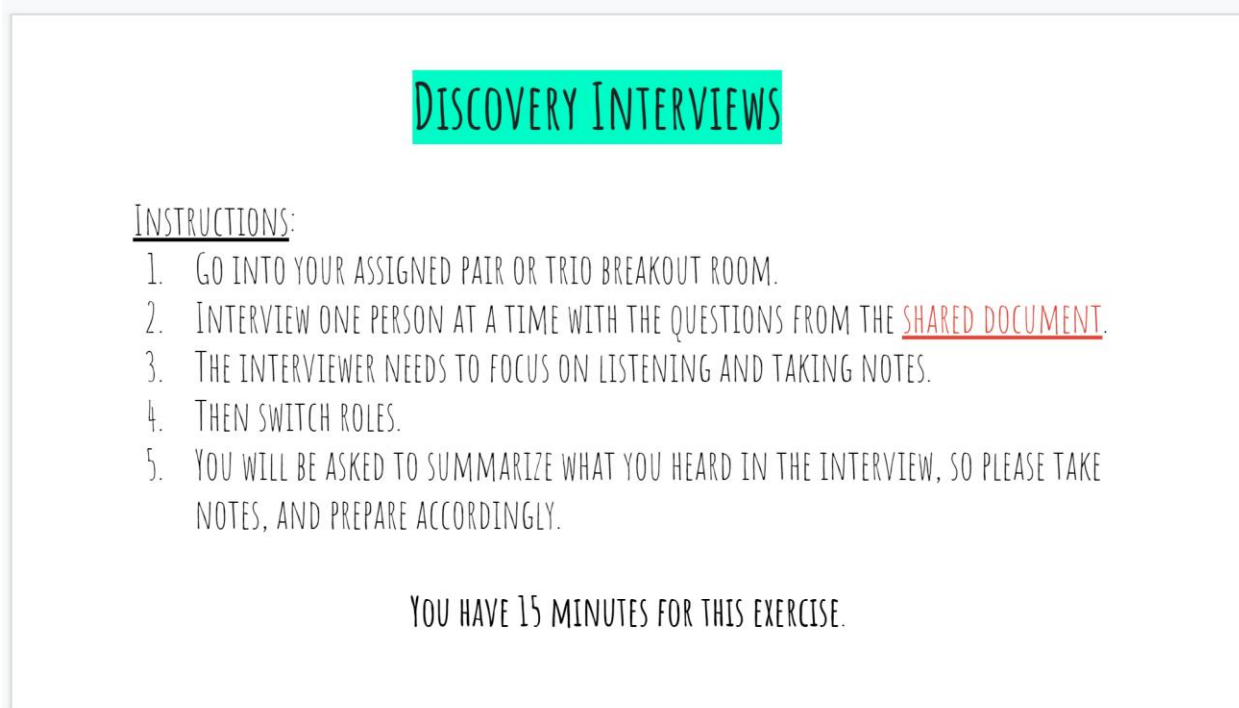


Photo: Instructions for Discovery interviews

Participants were then sent to their pre-assigned breakout rooms to begin the interviews. We had one participant that experienced technical difficulties, so one duo did not get as much time for the discovery interview. Below is the modified Interview Guide, which focused on “highly effective teams/organizations” as several participants did not have any experience with onboarding.

CTRC Appreciative Interview Guide

Instructions:

Go into your assigned pair or trio breakout room. Interview one person at a time with the questions from the shared document. The interviewer needs to focus on listening and taking notes. Then switch roles. You will be asked to summarize what you heard in the interview, so please take notes, and prepare accordingly. You have 20 minutes for this exercise.

Topic: Ease in Hiring and Retaining Exceptional Talent

1. **BEST EXPERIENCE:** Recall one of your best experiences of working on a project team here. One that exemplified why you continue working with the Center. Tell me about that experience. What did you value about yourself and others? What did you value about this org?
2. **TEAMWORK:** Think back to when you first came onboard at the Center for Trauma-Resilient Communities.
 - a. What most excites you about working here?
 - b. When you are feeling best about work, what about the task itself do you value?
 - c. Share a story of how the Center best supports professionally. What conditions made this possible?
3. **CORE VALUE:** What do you experience as the core value of your organization? Give some examples of how you experience those values.
4. **THREE WISHES:** What three wishes would you make to heighten the vitality and health of this organization?

SOURCE: *AI for Organization Change: A Workshop Resource Book* by Jane Magruder Watkins & Bernard Mohr

When the groups came back from the interviews, we took time to hear their stories and document themes. Typically, we would ask the group to populate the themes, but we chose to complete those ourselves as a way to create more time for other activities. Participants were asked to choose their top three themes and share their votes via chat within Zoom. The highlighted themes (red text) are included in the slide.



Photo: Common themes from Discovery interviews

This completed the Discovery phase, so we introduced the Dream phase to participants. Again, we pre-assigned our groups for this work so that the core group was evenly split between these Dream groups.

DREAM SMALL GROUPS

INSTRUCTIONS:

1. GO INTO YOUR GROUP BREAKOUT ROOM.
2. GROUP 1 USES PAGE 2 OF THE JAMBOARD FOR YOUR WORK. GROUP 2 USES PAGE 3 OF THE JAMBOARD FOR YOUR WORK.
3. DISCUSS AND CREATE A VISUAL IMAGE (METAPHOR) ILLUSTRATING THE LIFE-GIVING FORCE OF THE COMMON THEMES.
4. CREATE A WORD IMAGE (PROVOCATIVE PROPOSITION-PP, POSSIBILITY STATEMENT, VISION) BASED ON THE METAPHOR
5. THESE INSTRUCTIONS ARE ALSO INCLUDED ON THE JAMBOARD. WE CAN HELP YOU.

YOU HAVE 30 MINUTES FOR THIS EXERCISE.

Photo: Instructions for Dream small group work.

We utilized the same Google Jamboard that we used for the group check-in process. Groups were each assigned one screen within the Jamboard with 25 minutes for work and discussions. Before going into breakout rooms, we used a couple of minutes to make sure that participants could access the shared document and understood the instructions. Erin and I served as a facilitator in the individual breakout rooms so that groups didn't get stuck during the limited timeframe. We instructed groups to spend the first 10-15 minutes on creating images and the final minutes for the Provocative Propositions.

- Group 1 Statement: The Center team is a group of diverse co-creators who build on a foundation of creativity, continued learning, and connection.
- Group 2 Statement: Create a learning community of trust, full of possibilities with people who have diverse lived experiences and creative practices.

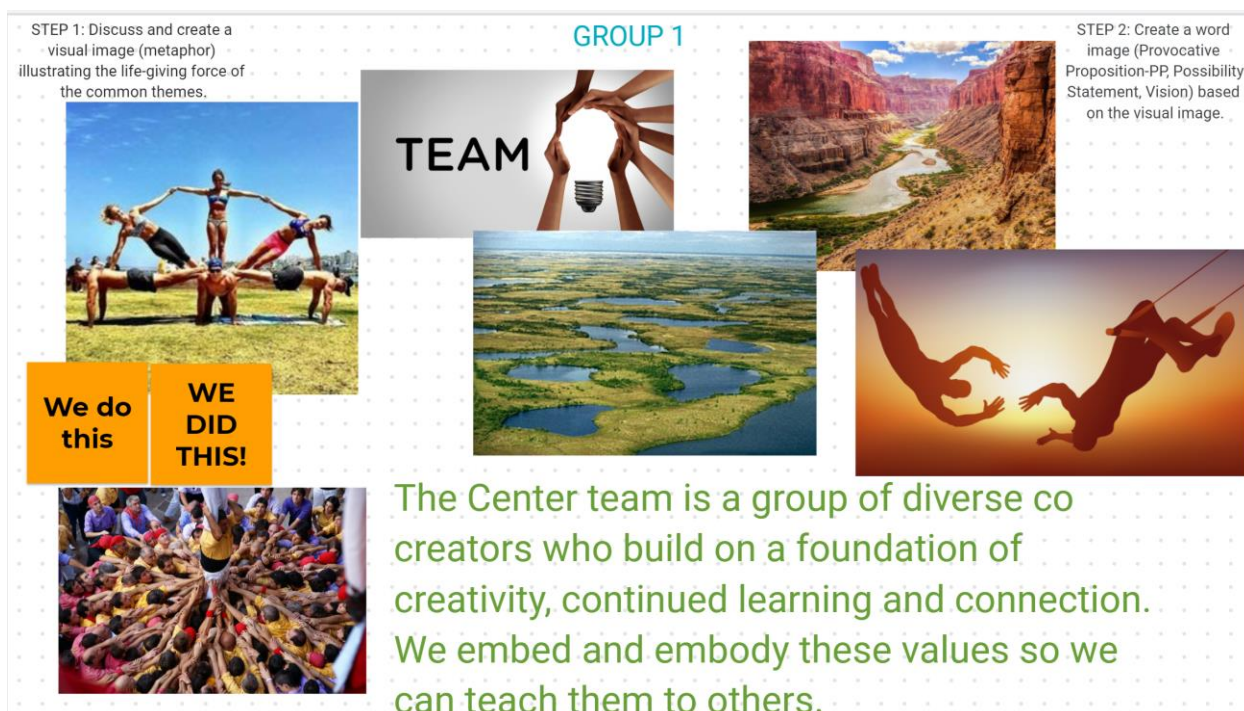


Photo: Small group 1 work on images and provocative propositions

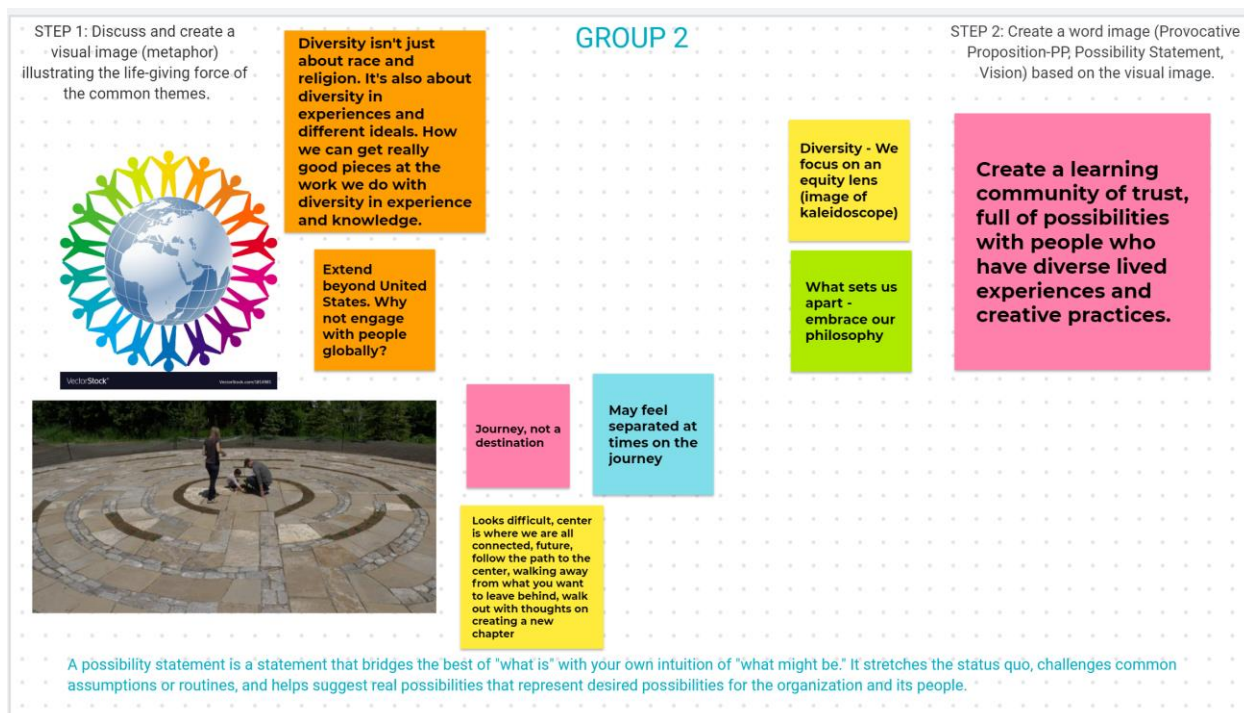


Photo: Small group 2 work on images and provocative propositions

The AI Summit ended with the attendees agreeing that the core group would take this work forward into a recommendations document (due January 2021).

DESIGN/DELIVERY

The core group took the Discover and Dream work from the AI Summit to inform their recommendations to the entire team in January 2021. The possibility statements were embedded into the new job descriptions, onboarding documents, and design elements for the new contractor welcome sessions and quarterly learning groups.

- *Responsibilities and skills-needed/qualifications for new CTRC positions (faculty, consultant, etc.)*
 - Faculty job descriptions (distinction between Consultant and Trainer)
 - Deeper understanding of Executive Director and Co-Founder roles
 - The **Co-Founders** provide a breath of experiential knowledge and dynamic strategic direction for revenue generation, market opportunities, program development, capacity building, and business sustainability. This group serves as an advisory board for the CTRC Executive Director.
 - The **Executive Director** leads a team of nationally recognized trauma-informed consultants and trainers. The Executive Director

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provides strategic direction, fundraising and revenue generation, financial oversight, and operational leadership.

Big Bucket	Executive Director	Co-Founders	CSCH
Revenue Generation	100%	50%	75%
Marketing	75%	50%	75%
Facilities & Ops	100%	0%	100%
Program Management	75%	75%	50%
Program Development	75%	100%	75%
Finance & Admin	100%	25%	75%
Technology & HR	100%	0%	100%
National Presence	100%	100%	50%
Resource Allocation	100%	0%	25%
Strategic Direction	100%	100%	50%

- *Capacity determination process (how many people do we need for what jobs and when)*
 - Project pricing formula (spreadsheet)
 - Faculty pay (benchmarking work)
- *Candidate review process (specific for contractors)*
 - Key forms from HR - includes those required for training onsite:
 - Background Check Release
 - NC Responsible Individual List (RIL) Information Request
 - Confidentiality/Security of Information Statement
 - NCDHHS Division of Social Services Statement
 - Emergency Contact
 - Conflict of Interest Disclosure
 - General Photography/Videography Release
 - Hepatitis B Consent/Declination (we've had onsite interns complete this form)
 - Medical History (also used this for Interns, and asked they get a current TB if working onsite)
 - Handbook Receipt
 - History & Array of Services (CSCH new employee orientation or other option)
- *Decision-making matrix for how decisions will be made around capacity needs & hiring*
 - Miro Board with decision-making workflow
- *Onboarding process for new employees in addition to Crossnore standard plan*
 - Onboarding checklist
 - Welcome sessions

- *Skill-building plan for employee growth and promotion*
 - Quarterly learning sessions - focus on teambuilding, training, and CTRC updates
- *Cohort development* (cohorts on hold for now, still need to discuss Tanya set-up)

OUTCOMES

Impact or Results: What organizational, group or community attitude, process or structure changes have people made as they move toward realizing the Provocative Propositions? What progress have people made toward their Action Plans, Strategic Intentions, Initiatives, or Pilot Projects? What stories of success can you share?

The group has changed in two ways. First, the core group realized the importance of co-creation as a team rather than making siloed decisions that affected the whole team. This was a reflection of the Constructionist Principle. Second, the core group shared in the closeout sessions of this project that the positive nature of the questions and work changed their mindsets from dreading the work to anticipating our time together. This was a reflection of the Positive Principle. The November 2020 welcome session received outstanding feedback from all participants. The core group is currently working on implementation plans right now.

What will you do to ensure that people continue to move toward realizing the Provocative Propositions? How will you help them gather stories of success? How will you help them celebrate? How will you, as the AI Facilitator, support their ongoing success?

I will continue to follow up with this client as part of my regular client outreach. Several of them have asked for more information about Appreciative Inquiry. The team is currently working on a marketing plan, and stories of success (internally and externally) are part of that initiative. Once I complete this project with CTRC, I plan to ask them if I can publish an article about work together for the AI Commons.

SELF-REFLECTION

Reflecting on your inquiry and the full experience, please share with us which of the Appreciative Inquiry Principles stands for you and why.

The Constructionist Principle most often stands in my mind as my draw to Appreciative Inquiry. In the last few years, I have undergone my own self-excavation through an equity and inclusion lens. This process has revealed the many social constructs that I have believed to be fact, such as race and gender. When one person or group defines the social construct, then we as a society and individuals lose out on expansiveness of ideas and thought. I'm also drawn to the Constructionist Principle because the questions we ask change the conversation every time. As a practitioner, I am never neutral; however, I can help my clients to build on their strengths and creativity through every intervention, including questions. Finally, I also relate to the Constructionist Principle through its relation to dismantling colonialism. Colonialism sees humans as deficits to be fixed; social constructionism sees humans as possible of anything.

What did you wish for in the inquiry? What did you learn from the inquiry about yourself and your facilitation? What was your “personal best” experience related to facilitating the inquiry?

I had three wishes for this inquiry:

1. Introduce Appreciative Inquiry to a dynamic group of consultants
2. Introduce a reflective, co-creative and positive workgroup practice
3. Complete a virtual AI Summit with my work partner, Erin Hall

For me, it was a learning experience with a trusted team as I already knew the AI Core Team members when we started, as I had previously facilitated work with them. I also wanted to practice the Edgar Schein practice of [process consultation](#) rather than show up as an expert. This approach required me to slow down and intentionally build strong relationships across the network and the AI Core Team. This was opposed to previous habits of jumping into a project quickly, coming up with answers on my own, and wondering why people wouldn't follow my direction.

I was surprised by how much the AI Core Team valued our time together. The team said that our meeting designs encouraged them to slow down, tap into their creativity, and work together as a team. I learned that virtual work takes more time to keep people engaged and focused. I used activities such as journaling, music, meditations, breathing exercises, and virtual collaboration boards.

I would also break the AI Summit into two sessions with asynchronous work in between. A typical AI Summit is at least four hours, which is not ideal for virtual. I have found that virtual sessions hit their limits at 2 hours. In the first session, I would introduce AI, discuss the Define topic, and provide instructions for Discovery interviews. Then I would ask people to complete their Discovery interviews between the 1st and 2nd session.

Then I would start the 2nd session with sharing stories and complete the Dream and Design/Delivery portions.

Do Not Post Practicum Report

I'm planning to ask the client for permission after my project is completed (Spring 2021).

Please submit your Practicum Report to Kathy Becker at Certification@CenterForAppreciativeInquiry.net. In addition to your trainer(s), Kathy Beck is also available for questions. Please include in the subject line of your email: AIFT Certification.