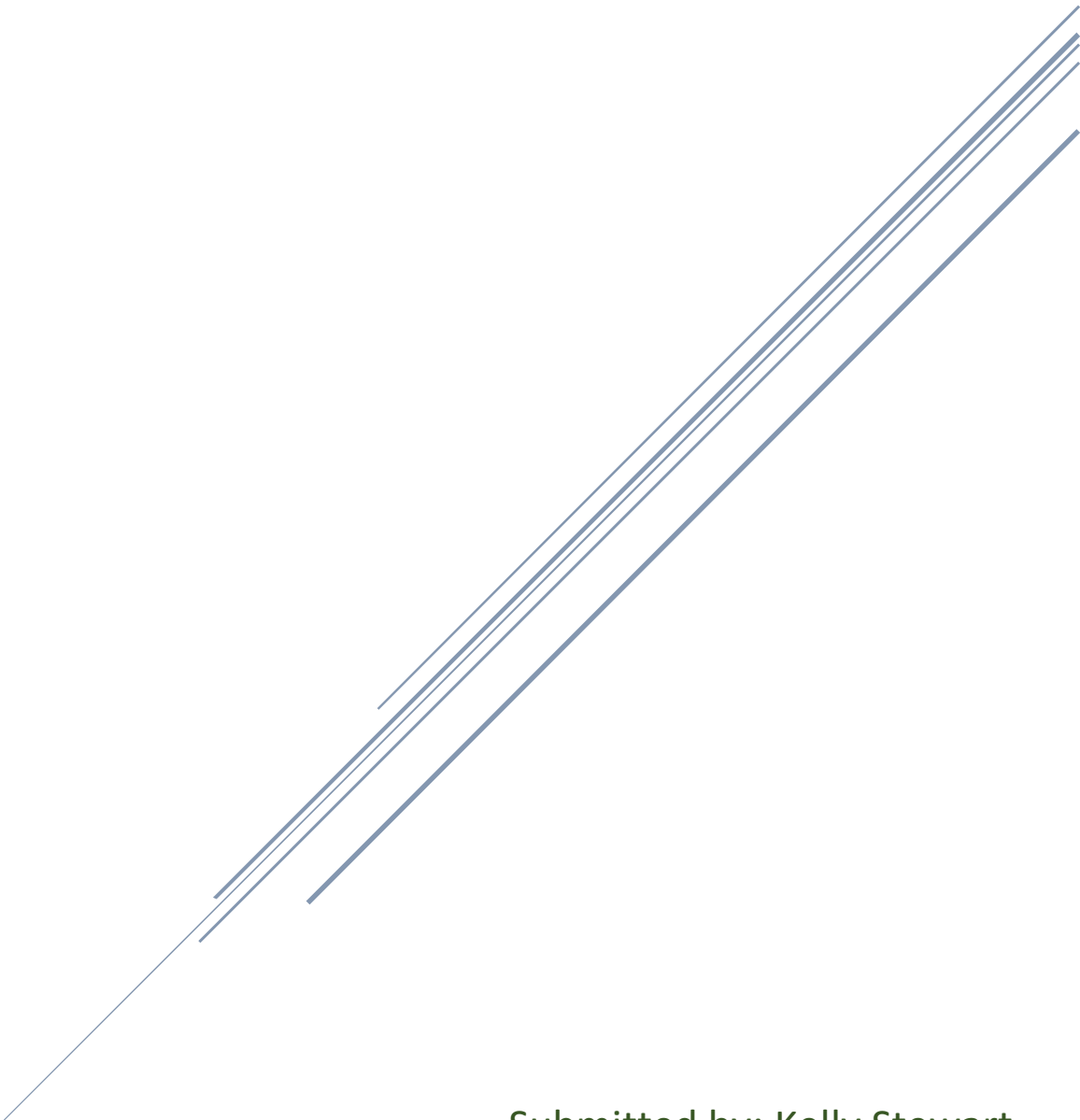


# AIFT PRACTICUM

Strategic Planning Summit



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## Contents

Overview.....	2
The Positive Topic.....	2
The Interview Guide.....	3
Other Responsibilities.....	3
Method.....	1
High-point Experiences.....	1
Strategic Statements (Provocative Propositions).....	2
Bold Initiatives.....	2
Assessing Impact or Results.....	2
What will you do to ensure that people continue to move toward realizing the Provocative Proposition(s)?.....	2
Reflections.....	2
What did you wish for in the inquiry?.....	3
What did you learn from the inquiry about yourself and your facilitation?.....	3
What was your "personal best" experience related to facilitating the Inquiry?.....	3
What would I do differently?.....	4
What do I plan next?.....	4

## Overview

Imagine my surprise and delight when I was asked to join well-known, highly respected AI professionals in designing and facilitating a strategic planning AI Summit for a private K-12 school in a major metropolitan area. Eager, exhilarated, thankful, curious, trusting, and optimistic begin to describe how I felt about this incredible journey. To work with people I respect, to learn and do alongside them, watching the principles of AI come to life was very much part of the future I started envisioning in January 2021, and now it was happening.

We expected more than 100 attendees who, to our knowledge, were not familiar with Appreciative Inquiry. Participants served in Administrative, Staff, and Faculty roles, regularly interacting with students and parents.

A delay in the final approval to proceed and a need to work within the school's scheduled Professional Development days meant working on a very compressed schedule.

Our Pre-Summit Planning and Core Teams meetings were virtual, except for the final Core Team meeting held the night before the Summit at the school.

## The Positive Topic

It had been approximately 30 years since the school had done any formal strategic planning. As the project developed, there was a general sense that the focus of this Summit shifted to serving two purposes: 1) to bring people together in a physical setting (many for the first time due to the COVID-19 pandemic), participating in something they have not done before and 2) to surface ideas from them that might *inform* a strategic plan, rather than create the strategic plan from the Summit.

There were only a couple of weeks between the authorization to proceed and the day of the Summit. Despite several attempts to elicit a catchy title for the Summit, the client alternately referred to it as a Strategic Planning Day or Professional Development Day since the time set for the Summit was taking place on a Professional Development day.

## The Core Team

All faculty, staff, and administrators were invited to be a member of the Core Team via email written and sent by Senior Leadership. Fourteen (14) faculty members asked to be part of the Core Team along with the Head of School (2 years on staff) and Assistant Head of School for Strategic Initiatives (25+ years on staff).

Some Core Team members had been with the school for a while, and others were new, offering different perspectives from their roles and disciplines spanning all grade levels and including someone from College Guidance and the Director of Annual Giving and Stewardship for the school. Some Core Team members were meeting their colleagues for the first time as part of the Summit.

In initial conversations, the client shared there had been previous “trust issues,” that diversity and inclusion were hot button issues, and that there was a growing sense among Administration that the faculty feels too much emphasis is being placed on one best path for future success, i.e. post-secondary education. The client also shared the last time the School worked with consultants it did not go well.

With these insights in mind, we modified the generic Interview Guide to elicit ideas on how to:

1. Build and maintain trust among stakeholders
2. Proceed in times of change and growth
3. Inspire individuals to contribute their best and collaborate with one another for [School]’s success with an implied sense of inclusivity.

The other focus in the preface of the first interview guide was to allow participants to express how to best meet the needs of students to become citizens who act with conscience, courage, and compassion.

### The Interview Guide

We shared the modified generic Interview Guide with the Core Team meeting during our first virtual meeting 11 days prior to the Summit, along with the Interview Instructions, and discussed the questions. During this conversation and post-meeting survey feedback, we better understood what the Core Team members wanted to see as outcomes from the Summit which included:

- Vision
- Collaborative reflection and action
- Forward thinking
- Collaboration and creativity

Interestingly, the issues Administrators shared did not specifically surface in conversations with the Core Team to the degree I anticipated. If we think of collaboration as something that happens among people, free from hidden agendas, to work toward a common goal or shared vision, then the word “collaboration” could encompass some of those issues, e.g. lack of trust, lack of diversity, without being limited by them. (Note: The positive opposite of those issues surfaced during the paired interviews.)

This feedforward was significant. We revised the Interview Questions to be more general in scope and shared this during our 2<sup>nd</sup> virtual Core Team Meeting 8 days prior to the Summit.

The night before the Summit we had our first in-person meeting with the Core Team which was energizing and action-packed. After more discussion and fine-tuning the word selection, we finalized the Interview Guide which the Core Team was excited to use. (**See Attachment A**)

### Other Responsibilities

We reviewed the Core Team roles and responsibilities again, namely – leading the group’s tasks, keeping an eye on the time, and ensuring that notes were recorded to be reported/shared with the group. Next, we adjourned to the room where the Summit would take place giving each Core Team member time and materials to make their group space their own. It was amazing to see their enthusiasm grow with their creative expressions. Flip charts, markers, pipe cleaners and toys had been expertly arranged for by the lead Facilitator with assistance from the Assistant Head of School for Strategic Initiatives.

## Method

After a Welcome and Introductions, we shared a PPT prepared by one of the lead facilitators (pictured, in part, below) along with a printed packet of materials for participants.



Participants contributed to Appreciative Agreements for working together, sharing ideas on how they can bring out the best in each other and create an open and safe environment that invites everyone to share. This work built on the Appreciative Agreements the Core Team had developed.

Next, participants worked together in pre-determined groups. When it was time for the face-to-face paired interviews, they had flexibility to find locations throughout the school, even outside, if desired.

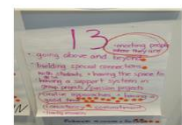
## High-point Experiences

The following aspirations ranked in as Life-Giving Forces that emerged during the

Discovery phases interviews and through an Energygram lens:

- Creative approaches (to teaching) and having a good time; being more messy
- Collaborative, positive school community
- (A culture of) trust and diversity
- Having flexible schedules, breathing space, space for inquiry, pursuing passions
- Addressing inequities amongst staff, faculty, and students
- Storytelling/personal narratives that show many paths to success
- (A culture of) transparency
- Prioritizing mental health

## ENERGYGRAM



### Strategic Statements (Provocative Propositions)

After participants viewed and digested what surfaced in the Energygram exercise, they returned to their small groups to dream about what those life-giving forces might look like at the school. Several themes emerged including collaboration, transparency, creativity (to get “messy”), and flexibility (to reflect, to breathe). (**See Attachment B**)

### Bold Initiatives

Next, participants worked in small groups to design specific steps, practices, and initiatives they hoped to see and test in the school. These bold initiatives built on the strategic statements ranging from practical (but new) ideas for this school to more leading-edge instructional ideas reflective of a modern learning community, i.e. baking more flexibility into the schedule to buying a farm to reorient everyone to what’s happening “outside the city.” (**See Attachment B**)

### Assessing Impact or Results

Being physically separated and professionally disconnected from one another, we were unsure to what degree people would feel comfortable working together and lean into the AI approach, especially since it seemed no one was familiar with it. Some participants had also never been involved in strategic planning and were unsure what it all meant. Given this level of “unknowingness” they were eager to learn and quickly relaxed into the process.

The client indicated participant response was very positive. During the Summit we overheard participants sharing how much they appreciated being together like this, how they’ve never been asked questions like this before and wondering why they are not asking their students questions like this. It feels as if the power of generative questions made an impact upon many of the participants.

What will you do to ensure that people continue to move toward realizing the Provocative Proposition(s)?

The client has not yet shared whether they’ve proceeded with the next steps of strategic planning and what might be included from the Summit. We remain curious as to the lasting impact of having experienced AI and hope to have future conversations with the client about this. To help maintain the momentum generated during the Summit to support ongoing success, we offered to debrief with the Core Team and provide additional AI training and to facilitate closed DEI sessions. We hope this is something they might pursue soon.

### Reflections

Two AI principles stood out for me because I experienced them more completely than I have in SOAR engagements; they are Simultaneity and Anticipatory.

The principle of Simultaneity lets us know our questions are fateful and ignite change the moment they’re asked. The experience of working with the Core Team to revise the Interview Guide and see how

intentional they were in making sure we were asking the “right” questions with the “right” words was quite remarkable. I learned this level of participation was vital to setting the stage for the entire Summit. I was also surprised they had input on the formatting of the Guide as well.

The Anticipatory principle reminds us that images truly motivate us to make change/take steps toward the future we want. I had never used the Energygram before. It was wonderfully uplifting to see so many people placing their dots next to what gave them energy. It was like watching a time-lapsed video of people painting an incredible mural that was coming to life in the Summit. It was exciting to observe “a-ha” moments sweep over the participants as they see how their individual dots were painting a very clear picture of a preferred future for the school’s community and then to see that carry over into the Strategic Statements (Provocative Propositions) and Bold Initiatives.

What did you wish for in the inquiry?

My wish is always for transformation. I wished the participants would experience the intellectual and psychological thrill associated with answering the questions, “What if you could do [that thing you want]? What would that look like?” and understand how their responses provide direction for moving forward in ways that feel like natural next steps and in ways that rise above the risk avoidance strategies most closely associated with strategic planning today. I believe they did.

What did you learn from the inquiry about yourself and your facilitation?

I come to this work via strategy, not OD, and I typically “work alone.” There are several things I learned about myself in this inquiry:

I’d like to foster a deeper sensitivity to understanding that change is taking place among the *people* in the organization; it’s not only about the strategic ideas that surface.

I truly enjoyed working with others as part of an AI team. I feel we worked well together, supporting one another, and taking on our individual roles, and that our mix of strengths were contiguous so that we offered the client a full spectrum of value.

I need to continue trusting my ability to “read the room” while trusting in the process, especially when I sense that participants might need something more than originally anticipated.

Since I had not yet worked with a Core Team, I was very happy to have the experience. Despite the abbreviated schedule and that they were not familiar with AI, I better understood how advantageous it is to work with a Core Team in connecting the facilitators with the larger group of stakeholders.

What was your “personal best” experience related to facilitating the Inquiry?

The entire experience was a “personal best” experience for me because I was invited to actively contribute to the design and facilitation. I allowed myself to go with the flow, rather than try to orchestrate the process, and in doing so, I gained confidence that truly comes from “being in the balcony and in the dance” and a greater understanding of what means. It is also personally rewarding for me to hear the “exquisite details” that emerge when people share their stories (their narratives) because it reaffirms my beliefs that everyone does have a unique voice, and that in many ways, we are more connected than we might seem at first.

What would you do differently?

With the gift of hindsight, I would have made time for another Energygram exercise after the Strategic Statements. I would keep the entire list of Strategic Statements for the Client as additional data points and then focus on Bold Initiatives for those that garnered the most energy the second time, especially if it's a one-day engagement.

The short timeframe for planning and working with the Core Team was challenging. This has inspired me to think about how I might best address this in a future proposal.

Ideally, I would have liked to include other stakeholders in the Summit. This might include support staff, students, parents, and alumni. While it might not have been feasible to have everyone in the same session, I would have liked to have had mini-Summits with them and shared that with the larger group.

What do you plan next?

I use the SOAR framework with my clients to facilitate strategic conversations around overall strategy or specific initiatives. I'd like to bring in more aspects of AI into these conversations, especially using the Energygram (although I might have to call it something else) and being more intentional about incorporating the original and emergent AI principles. I look forward to finding additional exercises and best practices that will help me do that. After taking this course and being involved in this engagement, I feel better prepared to incorporate the 5I's (as they are referred to in SOAR) that mirror the 5D's which I had not utilized yet.

I also look forward to facilitating more AI Summits in different sectors and supporting others in this Community as we learn and grow together.