An Ironic Encounter with Engagement:

Surfacing a New Reality within a Youth Mentorship Nonprofit

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This project report prepared

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Abstract

This report tells the story of my project with a small youth mentorship nonprofit. The title, "An ironic encounter with engagement" symbolizes my experience as a process consultant attempting to understand the organizational dynamics that impact engagement in and commitment to an organizational change effort. The organization's staff and board had grown apart and there was no longer a clear sense of how their work was connected or what their shared vision was for the future. My design plan focused on using a whole system change approach to help the organization's staff and board teams explore and define how they wanted to work together. When the board decided to not participate halfway into the project, I was left questioning the process I took with the client and how I could have misinterpreted the client system's readiness for change so remarkably. Keeping in pace with my learning goals of maintaining simplicity, building confidence in my decisions, and improving my timing I changed the focus of the project quickly and decisively. The rest of the project focused on improving collaboration across the staff team, comprised of hardworking and mission-driven young people who wanted to make a difference in their students' lives. The steps taken, methods used, and discoveries made are discussed throughout the report and woven into my own experience as a human systems intervener navigating a complicated organization.

Keywords: Process consulting, engagement, organizational effectiveness, vision, whole system change, readiness for change, collaboration, human systems intervener

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Acknowledgments

I would like to thank each person that has given me a push or nudge to continue following my dreams during the last three years. My journey to Concordia's Human Systems Intervention program was never easy, but it sure was full of adventure, pain, laughter, and tears.

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And for the natural world…my first love, and the cycles that continue to remind me how to be my fullest self.

Foundations in Process Consulting

This project report walks you through my first experience leading a full process consulting engagement during the spring and summer of 2021. The project took place during a global pandemic (COVID), and I was required to conduct all engagements and sessions 100% online. While many people had become accustomed to working online at this point, it nevertheless influenced the project and is an important contextual factor to consider. As a process consultant, my goal was to work in partnership with the client to help them better understand their environment so that they could improve it and build a more effective organization (Block, 2011). In this process versus content-driven consultant stance, I tried my best not to provide solutions, but to facilitate a process that allowed the group to draw on their collective knowledge to work together to find a solution. This work intends to help teams, groups, and organizations increase their capacities for collaborative problem solving and overall effectiveness.

Maintaining the balance of providing the process, structure, and support for the client to sponsor, lead, and sustain a change effort proved to be difficult at times. There were moments where in pursuit of allowing the client to pave their way, I quieted my own gut impulses to intervene out of fear of damaging my credibility within the client system and changing the path of the project. To maintain what I believed was a pure process consultation approach, I often took the client's lead throughout the project.

Learning Goals

Clarifying and defining my learning goals for this consulting project was difficult because there were so many methodologies and skills that I wanted to learn and improve upon, and theories that I wanted to explore more deeply. The Human Systems Intervention (HSI) program had introduced me to a whole new way of working with people and at the beginning the project I didn't have a strong sense of what exactly I wanted to achieve. My hope was to weave complexity into a corporate challenge project. The process of simplifying my learning goals to move forward with the project exemplified my first learning goal: to focus on simplicity. I wanted to plan and design an intervention that would balance the simple with the complex, and if nothing else, to do one powerful thing. I not only wanted to begin with one clear and simple purpose, but I wanted to maintain this clarity throughout the project. This learning goal would prove to test me as I waded through murky waters in the middle of the project.

My second goal was to build confidence in my decisions. Up to this point, I struggled to make decisions, especially when my choices impacted others. When working on small teams I find decision-making a bit easier as I can negotiate impacts with others and feel more secure in the process. Consistent with my goal to bring clarity and simplicity to the project, I wished to respond to ambiguity in ways that would bring more ease to the process, both for myself and for the client organization. I also was curious about how my relationship with decision-making might impact my perceptions of how decisions are made in the client organization.

My third and final learning goal was to improve my timing. I wanted to strive to be more in tune with how long each element of the project would take and to be mindful and intentional with planning and implementing the project, as to not make promises to myself or the client that I would be unable to keep. Being in tune with my timing directly correlates with my ability to have confidence in my decisions and my pursuit of simplicity. These three goals signified my mental state at the time of beginning this project; I was generally anxious about the given timeframe and on my ability to design and implement an intervention that would be meaningful and impactful for myself and the client. How I worked through these goals will be discussed at throughout this report.

Process Consulting within a Youth Mentorship Nonprofit

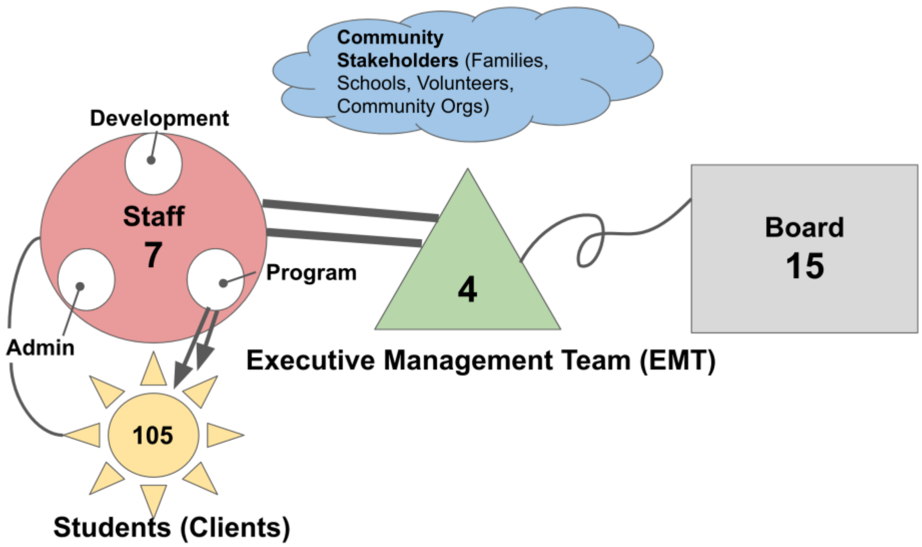
The Client System

My initial hope was to find a client system that was unlike most places I had worked; much of my experience was in grassroots-style nonprofits so I was looking for a corporate, male-dominated, top-down, technical organization. However, none of these organizations seemed to have the capacity or time to work with me. One large retail corporation was busy with the holiday season; a local food company did not think they were the right fit; and a municipal government's engineering department did not have the time to engage due to pivoting their operations during the pandemic. It was after a few closed doors that I decided to open my search up to the nonprofit community and within a few days, I received an email from the Executive Director (ED) of a youth mentorship organization expressing their desire to work with me. The organization provides long-term mentoring relationships to hundreds of young people in grades 7 through 12 by utilizing outdoor experiential education.

My client organization was founder-led for 21 years until 2015 when a new ED was hired. When I started the project with the organization there were 12 staff members, including 2 AmeriCorps interns and 15 board members. There is an administrative, development, and program staff team and each year the AmeriCorps interns work on the program staff team. The director from each team is also a member of the Executive Management Team (EMT) which includes the ED, development director, program director, and communications director. The organization also has relationships within the local community, including schools, organizations, and other community services. These relationships were not explored during this project, so I do not know the extent of their work together. Please see Figure 1 below which provides a simple systems map.

Figure 1

Systems Map of Client Organization



At the time when I met the contract client (the ED) and got to know more about the organization, it was December of 2020 and they were going through many changes, like most organizations navigating a global pandemic. School closures were changing the way program staff worked with their student clients, the organization was moving its offices into a new building, undergoing a strategic planning process, and the board was in the middle of a leadership transition on top of a new capital campaign. With all these changes happening I thought that it would be an interesting opportunity to weave a process consulting approach into the organization. A question I hadn't yet considered that would have been fitting to ask the client during our initial meeting was, "Does your staff and board have the capacity to take on another project right now?" I didn't ask this question at this point in the project because I saw no obvious indication that the system had a capacity issue. In hindsight I can see how important this question is during an initial meeting and I will be including it in all future client projects.

Entry and Contracting

When I was initially approached by the organization's ED, she didn't mention a specific issue that she wanted help with, she was simply excited about the opportunity of working with a pro-bono consultant to build more capacity within her organization that was already undergoing some changes. During our first conversation, it became clear that the ED was very confident in her staff's ability to navigate the transitions happening in the organization, but that she was less confident in the board's ability to unify around a strategic vision for the future. In addition to undergoing a strategic planning process, the board was shifting from a grassroots culture to a philanthropic culture, and this was revealing some gaps in board members' knowledge of the organization.

The way the ED spoke about the organization was inspired and dedicated. Because of her openness to sharing what was going on in the organization, I felt secure in her commitment to the project should we continue to work together. I also sensed in the way that she spoke that she held an inclusive and participative approach to management and leadership and that she was ready to welcome different perspectives to promote a new level of engagement. I felt that her commitment was authentic and therefore she would be a great contract client to partner with on a process consulting project. Her authenticity showed up in how she asked me questions, her quickness to engage with me, and how she spoke about the respect and care she had for her staff and organization. While the ED showed an authentic willingness to engage, I was not yet sure if the rest of the client system would express the same enthusiasm. I was also not sure if the situation was suitable, e.g., if there was a *real issue* that was impacting system members enough to for them to want to improve it (Averbuch, 2015).

Finding Focus

Environmental Scanning

To begin the project, I needed to gather some information about what was going on in the organization, almost like a landscape photograph so that I could see the foreground and background of the environment in focus. I requested that the ED share contacts of at least five people across the staff and board groups that might have different views on the current state of the organization. Despite the ED's wish to flatten the organization, its structure is indeed hierarchical so I knew that it would be important to speak with those in supervisory roles in addition to front-line program managers and new board members. Conklin (2021) recommends speaking with those that are in leadership roles and at least two other groups of people in the system that will represent additional perspectives. I ended up having eight total conversations including with the incoming Board Chair, a new board member, an established board member, one program manager, one administrative assistant, and three members of the EMT. I also attended one EMT meeting and one board meeting.

I approached the environmental scan as an opportunity for me to learn about what was going well and where improvements might be needed across the organization. Having heard from the ED that there might be an imbalance across the staff and board and that the two groups might not work together often, I made sure to ask about what working across groups was like. Following the environmental scan, I was left with several impressions:

- Staff and board members were unsure about the future. While they had been working on a new strategic plan, they were not sure what the long-term vision was.
- How information and knowledge was shared was not clear across teams and groups.

- The program team supervisor left the team in 2019 and a few staff members expressed concerns about retention on the program team. The same concern was also presented at the board meeting.
- Board members wanted to be more involved with the "heart" of the organization. "Heart" was described as the mission of the organization—building relationships with youth.
- There was little interaction between the board and the staff; some felt this was appropriate and others desired more interaction.
- Board members were concerned about the capacity of the staff team and wondered if they were getting what they needed.
- The purpose of the EMT was not clear to all staff members. One staff member did not even know who made up the EMT.

Beyond these impressions, everyone I spoke with expressed gratitude and respect for the organization. One EMT member said:

> …the passion, inspiration, and heart of the organization is truly amazing. Everyone is so committed. I would put our part-time financial assistant in front of our largest donor because that's how much confidence I have in the heart of everyone that works here. (Development Director, personal communication, December 2020)

Before deciding on a focus for the project I met with the ED to gain more context on three specific things that I was left questioning after the environmental scan: Is turnover a pattern and is the ED concerned about retention? What was the board-staff relationship like in the past; and if it has changed, why? Why was the EMT created? She expressed to me that she didn't believe retention was an issue but a normal aspect of a caregiving organization that employs young people to work with youth. The ED fell silent when I asked her why the EMT existed. She chuckled and said she didn't remember exactly. After reflecting for a minute, she mentioned that the hope was for the EMT to help with decision-making, but that she wasn't sure if it was serving its intended purpose. Finally, the ED shared that the staff-board relationship had evolved and was shifting as the board became more sophisticated and focused on development rather than on programs. Previously, board members interacted with staff often and volunteered on programs, including having coffee with staff members and helping execute week-long expeditions. Over time the board and staff had grown apart and now their only interaction was in committee meetings. Not only did the board and staff not know what the other group was working on, but they did not even know one another's names.

Gut Feelings and "Energetic Breadcrumbs"

Following the environmental scanning process, I sensed that the ED still wanted to focus the project on board development. However, my intuition was telling me that there was something deeper going on with the staff team and that they might need some support. I had heard that staff members were uncertain about the future, that board members wondered if the staff got enough support, and that the ED felt the staff was carrying the organization. However, when I asked staff members and the ED directly, they said that the dynamic on the staff team was healthy, and that communication was strong. There was a discrepancy in what I was hearing, and I wondered if staff were hesitant to ask for help or if the ED didn't want to risk her relationship with staff members by only focusing the project on them.

I wanted to find a way to incorporate both groups into the intervention because I had a strong sense that both groups were experiencing problems inhibiting their abilities to work together effectively. I feared that by only focusing on one group, I might miss the connections that make up the whole picture. While I inquired about staff capacity and support, I didn't receive consistently strong feedback from the staff team or the ED that this was a concern for either party. Yet, I continued to feel like the staff needed support in some way; they seemed tired and overextended. This is where I left my first "energetic breadcrumb"[1] so that I could trace my gut feelings throughout the project back to areas that could have used further excavation. If intuition starts in one's gut as a feeling of discomfort, energetic breadcrumbs provide a path for one's reflexive learning practice towards greater knowing (McKnight & Jamieson, 2016).

Learning to listen to my gut and follow my energetic breadcrumbs will strengthen my practice as a human systems intervener, but I also must find a way to follow up on these breadcrumbs with the client in a timely manner. Conklin (2021) suggests that it is important to build a foundation of "shared intentionality" with the client (p. 110); to agree on the issue for which the change is targeted and to not hold onto assumptions or intentions that could undermine the change process later down the road. I believe that in this moment of the project I could have been more forthright about my strong inclination to not leave the staff behind which could have supported a stronger foundation for my participation and relationship with the system. The courage to be forthright would have applied directly to my learning goals of improving my timing and making confident decisions.

Instead, I drafted four possible project foci that I felt addressed the top impressions from the environmental scan and shared them with the ED for her to choose the one that would be most salient and exciting for the organization at that time. The four foci were (1) onboarding and

[1] Energetic breadcrumbs are the experiences or impulses that stimulate one's intuitive path towards deeper knowing. These breadcrumbs can show up as discrete pieces that a gut feeling leaves behind (Loder, 2020). This notion of energetic breadcrumbs was offered to me during my colloquium (A.-L. Howard, personal communication, October 22, 2021).

leadership momentum, (2) visioning for a growing organization, (3) connecting the organization through building collective knowledge, and (4) how do the staff and board want to work together to build the support and capacity needed for the opportunities that lie ahead? The ED thought that the fourth focus would generate the most engagement and provide the most value for the organization in its current state.

Diving Deeper into the Ways of Working

A Tale of Two Surveys

I designed two surveys to gather more data about the current and desired state of how the staff and board work together (See Appendices A and B). At this point in the project, I thought it would be best to gather two sets of data and conduct two separate sensemaking sessions because the board and staff did not yet have a clear relationship and I was not sure how much psychological safety there was (Edmondson, 1999). I thought that by allowing each group to make sense of their own data first it would allow for members to open up more before convening as a whole system. I wanted to know not only how they worked across boundaries but also how each group worked together in their subsystem. These three categories of data gave me the freedom to inquire into each subsystem, across subsystems, and into the whole system. I questioned this methodology and worried it might widen the scope of the project and directly challenge my learning goal of keeping it simple. But I wanted to maintain my intention of observing and intervening on whole system dynamics while also allowing for the possibility of smaller interventions in each subsystem. To follow up on my gut feeling of a potential underlying issue in the staff team, this method also allowed me to learn more about their dynamics and what supports might be needed to build their capacity.

The data-gathering decisions I made allowed me to investigate any correlations between the dynamics within each subsystem with that of the whole system. While I was anxious about the amount of data this would give me, I remembered adrienne maree brown's (2017) work on emergent strategy where she discusses the fundamental importance of examining the small so that you can see the whole, and that "what we practice at the small scale sets the patterns for the whole system" (p. 53). Beyond supporting the practice of working with fractals, this decision also gave me some security that I wouldn't be missing any important data and leaving individuals out of the process. However, I do think this choice challenged my specific learning goal of maintaining simplicity. When I reflect on the design of these surveys, I remember a distinct sense of knowing in my body that I was adding to the complexity of the project rather than promoting simplicity through a clear and concise focus.

The staff survey results came in quickly and I was encouraged at the 100% response rate. I felt overwhelmed at the amount of data I had already received from just half the system. There was resounding agreement across their data that the staff and board did not interact outside of committees. Those staff members who weren't on committees didn't know any board members, and other staff only knew the select board members that were part of their committees. All staff members expressed the desire to know the board and to build a shared vision with them. They also thought it was important for the board to understand their work at a deeper level so that they could support them in the strategic plan. I didn't sense any toxic behaviors or power struggles between the two groups. It seemed that the recent organizational changes, including new leadership and board members, were overshadowing that they hadn't taken the time to build the relationship and define how they wanted to work together.

The staff's responses on their ways of working as a team were more varied and less consistent than their responses about working with the board. Their data suggested there was some difficulty in collaboration across teams and that feedback and information sharing was somewhat strained leaving people feeling out of touch. Not only did I sense some tension in the responses, but one respondent mentioned tension can be felt when working as a whole staff team or with other teams.

Specifically, some staff members mentioned that while feedback was offered it wasn't always followed up on, and information that impacted everyone was not always shared. Edmondson (2012) suggests that team members have taken-for-granted or "tacit" knowledge that may be obvious for those within the same team, but it may not occur to them to share this information across teams or with other organization members. This can create knowledge boundaries, further challenging teams to communicate and collaborate effectively across functional boundaries (pp. 206-207).

In addition to expressing these frustrations about information sharing and collaboration, staff members also mentioned several positive aspects of the organizational culture. They said that the organizational culture was one centered on relationships, sharing thoughts, and that while they appreciated the flexible and autonomous work environment, there were still many opportunities to remain connected and check in with one another. This presented a lack of congruity between the espoused culture and the actual dynamics of the staff team.

I themed the staff responses on Mural by copying each response on a sticky-note, clustering and organizing them, and adding more weight to the themes that were repeated (enlarging the sticky notes and clusters). I then scanned the final clusters, extracted key words and expressions, and expressed them as distinct themes for the staff. I facilitated the first sensemaking session with the system and waited for survey responses to come in from board members.

Staff Sensemaking Session

Since I conducted two surveys and had two buckets of data themes, the plan for the intervention was to design and conduct two sensemaking sessions, one for the staff and one for the board. During these two-hour sessions, I would share the themes and facilitate a process for participants to discuss the themes and how they would like to move forward. With the staff data themed, I prepared to facilitate a sensemaking session with the staff for them to make sense of their data together and prepare for the whole system workshop (See Appendix C for Session Design). After facilitating a check-in and reviewing some of the mutual learning behaviors to establish connection and norms for interaction (Schwarz, 2017), I shared the themes about their staff team. The themes were surprising to some participants, and they spent some time sharing their reactions and curiosities about the data. One theme that the entire group agreed on with no resistance was that collaboration could be improved. The rest of the session was spent exploring what collaboration meant to the staff team and how they wanted to collaborate moving forward. Figure 2 summarizes the key staff data themes.

Figure 2

Staff Survey Themes

Themes from the Survey Data

Strengths	Opportunities
Relationship building is prioritized and Staff are encouraged to share their thoughts both formally and informally	Collaboration is easier on small teams and generally happens in meetings. It is more difficult to collaborate as a larger group
Desire to remain connected, share feedback, and request/offer support. Frequent meetings and check-ins help to maintain this connection	The ways that feedback is given and received can be improved, including making sure we "circle back" more often
Team Charter provides for accountability and a chance to check in on issues and patterns	Staff meetings are not as effective as they could be, resulting in feeling out of touch as a whole
Flexible work environment with high level of autonomy	Collaboration and communication has become more siloed and less accessible to all
Excitement about work is appreciated and helps to create a positive atmosphere	There can be tension at times when working in groups and some voices are more dominant than others

Overall, Staff want to create more time and space to collaborate and build a cohesive team that works together with ease.

Collaboration. Collaboration is an abstract topic that can mean different things to different people. The session was designed for participants to make their own meaning and share their interpretations. The purpose was to encourage the group to have a generative conversation where they could collectively make sense of the actions and behaviors that would promote more collaboration on their teams. In dialogic OD, language is constructive, and conversations create new social realities, so when staff members began to talk about the ways they wanted to collaborate they were actively shaping a new way of working together (Marshak, 2019). With 12 young staff members all working towards improving the lives of young people through mentoring relationships, I initially assumed that collaboration happened naturally, but my assumption was incorrect. A slew of factors was impeding their ability to collaborate fewer program staff to manage growing student caseloads, underlying dynamics across cross-functional teams, and the stress of constant problem-solving throughout a pandemic.

In addition, the traditional organizational structure may have made it more difficult to collaborate. “Siloization” was a term described by a few participants, some highlighting that working across teams had become more difficult, especially with the added challenge of working remotely during the height of the pandemic. In the survey responses I observed a slight “us versus them” dynamic between two of the teams development and programs, with one member mentioning that there had been tension in the past and that she hoped they could put it behind them to move forward. I’m not sure what happened between the two teams, but I sensed that there was a historical event that some members were continuing to hold onto. The increased workload on the program staff and the lack of an effective feedback mechanism between the teams might have exacerbated this dynamic.

Trust. During the session, I was curious if there was adequate trust developed within the staff team and whether that was impacting their ability to share openly and take risks during the facilitated conversations. There was a possibility that an underlying mistrust had been built up over the years between the development and program teams based on comments made in the survey about an “us versus them” dynamic, impeding open information sharing and collaboration across teams. This presented itself once during the sensemaking session when a program team member questioned the importance of a specific form that the development director was requesting but seemed to end there. Miller and Katz (2014) suggest that when cross-functional teams don’t interact often, the perceived safety among colleagues is reduced, leading to less willingness to share information and fulfill requests, and making active collaboration further and further out of reach.

For the session, I had prepared Lencioni’s model (2002) on the five dysfunctions of teams with the purpose of having participants reflect on the behaviors that were holding back their collaboration and correlate these behaviors with the 5 dysfunctions. While the group was brainstorming behaviors, I had a gut feeling that they were not ready to face something uncomfortable and unpleasant, so I made a quick decision to drop the Lencioni model. My fear was that the negative framework of the model, e.g., “absence of, fear of, lack of, avoidance of, and inattention to” (p. 188) would compromise the team’s psychological safety and hinder their ability to remain open and curious in the session (Edmondson, 1999). At this point, I wasn’t sure if we had established enough psychological safety and a comfortable enough container to explore the *real issue*. While I sensed a lack of trust in the team, this was also an indicator that they may not have had enough trust *in me* to facilitate them through something difficult.

Because of these doubts, I feared that Lencioni’s model would shut them down and they might lose any trust they *did* have in me. Luckily, I was using the outline feature in Mural and had already “hidden” the graphic representation of the model, so I simply transitioned them into the next exercise and shifted in the moment towards a more appreciative approach. By appreciative I mean, “affirming the strengths, successes, and potentials that will give life to the system” (Cooperrider & Whitney, 2005, p. 9). My ability to be timely and make this quick decision based on what I sensed the group needed met two of my learning goals and moved the group into a more positive and productive activity where they began to dream together rather than fixate on what wasn’t working.

Sailing Together. I had prepared a gallery of assorted images and instructed each participant to take time to reflect on how they wanted to be collaborating and to choose the image that best represented their dream state of collaboration. In dialogic OD, generative images are powerful tools that can surface or stimulate a new way of thinking about the present state (Marshak, 2019). In this case, each staff member was able to think more deeply about their hopes for a future way of working and to join their colleagues in their visions for collaboration. Most staff members connected with a ship metaphor, where they were all working together to sail smooth and choppy seas. On the ship, each mate had a place and a role, but during times of stress, they were able to navigate the vessel with ease, anticipate threats, and move around to set themselves back on course. They agreed that collaboration was being able to anticipate and integrate their work more seamlessly by maintaining clear roles, lines of feedback, and creating more space for innovation.

The simple decision to shift the session from participants explaining the behaviors they believed to support collaboration to actively exploring how these behaviors worked together through metaphor helped to open the group up to new possibilities. I believe this exercise lit a spark that illuminated new individual and collective narratives of what the team was capable of. For example, prior to this exercise the group had not expressed how anticipating future needs was so dependent on having clear roles and a shared vision of where they were going. If metaphor can serve as a frame for how one makes sense of the world, then this exercise allowed staff members to better understand how their colleagues made sense of collaboration (Bushe & Storch, 2015).

Priorities Moving Forward. Following the session, I organized the outputs into six priorities that the Staff might want to address to work more collaboratively. I developed these priorities by theming the staff responses from their brainstorm activities [that followed the metaphorical discovery] where they discussed capacities they need, capacities they already have, and questions to ask to achieve the desired way of working together. The priorities were (1) build strategies to be more proactive and less reactive, (2) boost communication and information sharing across teams, (3) clarify their shared vision, (4) clarify team goals and how support will be built across teams to reach these goals, (5) clarify roles on their “ship”, and (6) create a community of self-care.

Sensemaking Without the Board

This dimension of the project took a turn when only two board members completed the survey. Without revealing how many responses I had gotten, I shared this update with the ED, and we sent a reminder to the board. Four days before the board’s sensemaking session was scheduled to run, there were still only two responses, so I met with both the ED and incoming Board Chair (IBC) to discuss the next steps. Without wanting to sound an alarm or make assumptions about what might be going on I tried to approach the emergent situation with curiosity. The ED and IBC were surprised at the lack of response and jumped to a comfortable conclusion that it was the timing of the session and perhaps that was the reason they weren’t engaging in the survey or accepting the invitation to the session. The ED offered to send another reminder and that if two days before the session we still didn’t have responses we could make our next decision at that time.

Alas, two days before the scheduled sensemaking session came and nothing had changed. Instead of suggesting a distinct next step for the ED and IBC, I offered two proposals: we run the session with just the IBC, outgoing board chair, and ED and use the time to plan some board development work that the IBC can do within her first six months, or we postpone the session with the hope that rescheduling at a better time will produce a higher turnout. Both the ED and IBC still were holding on to hope that the board was simply busy and that the timing wasn’t right, so they decided they would like to reschedule with a doodle poll and an email from the IBC expressing the importance of the project.

A week later, the ED and IBC requested a regroup. No one had responded to the doodle poll and only a few board members replied to the IBC's email that stressed the importance of the project. The pair were disappointed and felt sorry that the board wasn't engaging more in the project. During this conversation, they were no longer speaking about inopportune schedules but about the reality of board engagement and whether they had misread the group's commitment to the work. The IBC stressed her steadfast commitment to the project and expressed her wish in joining the staff team in the full workshop without the rest of the board present. While the leadership duo was disappointed and apologetic the IBC moved quickly to reframe the situation: "In the spirit of our model how about we meet the board where they are? The work still needs to happen but let's embed it into scheduled board meetings over the next year" (IBC, personal communication, July 2021).

A big concern for the ED was how the staff team would feel about the board no longer participating in the project:

> I don't want to hide this issue from the staff, but I also don't want it to be a punch in the gut… they have been working so hard and this feels like a terrible time for the board to not have the staff's back. (ED, personal communication, July 2021)

My gut feeling about the staff team needing support was no longer just a feeling, it was a real concern that the ED was now expressing. Tentatively the three of us decided to keep the date of the workshop and design it around staff capacity building with a designated time for the IBC to join the staff and discuss the future of the board-staff relationship.

I left the conversation feeling surprisingly calm and optimistic; I was surprised that I didn't fall apart and write the project off as a failure. I was surprised that I didn't run off with my inner critic into the woods, never to be seen again. Sure, many thoughts flashed through my head that I had done something wrong, but I didn't hold onto them. Instead, I quickly adapted to the emerging circumstance which allowed me "to be in relationship in real-time" (brown, 2017, p. 94) and to better assess the needs of the client system at that moment. My original learning goal of maintaining simplicity and my field supervisor's steadfast counsel guided me during this period of ambiguity.

Project Reset & Ethical Implications

I returned to my supervisors to hear their insight on the emerging dynamic within the client system. I hoped for some validation that the path I saw forward would still be helpful for the organization and that the process would be approved given the nature of this being a university project with specific requirements. I also needed some guidance on how best to navigate the communication with all stakeholders (ED, IBC, Staff, and Board), and to ensure that how I was moving forward with the system was within my ethical compliance.

One possibility in this project was for me to continue inquiring into the board's lack of response. My interpretation on their lack of participation was that they were not very engaged with the organization, but I certainly did not have all the information. Without their participation I could no longer do a whole system project because this approach requires a critical mass of the organization to be involved in the exploration and discovery of a new way of working. It wasn't necessary for the entire board to participate, but I would have needed several members who had a stake in the issue to be involved so they could offer their perspectives and share ownership of the change effort (Bartunek et al., 2011; Block, 2011). Neither I, the ED, nor the IBC knew the reason why individually and collectively they were not participating in the project (some ideas on participation and commitment are discussed later in this report). As my academic supervisor wisely stated, “In not saying anything, the board is saying something,” and perhaps that was all I needed to know to move forward (R. Reilly, personal communication, July 2021).

Of course, I was curious to discover more about the board, but I was keenly aware of possible ethical implications as a student-consultant should I continue to probe into the issue. I considered the following ethical issues (CIHR, NSERC, & SSHRC, 2018):

- Coercion – At this point in the project the board members had been given four opportunities to participate. While many individuals in the group initially showed interest during the environmental scan, the formal invitations were declined. If I continued to inquire into their reasoning for not participating in the project, I would have been at risk of forcing them to engage.
- Debriefing – All staff members and two board members shared information about the board and their dynamic within the organization in the surveys as part of the data-gathering phase. With the board no longer participating in the project, I questioned whether I should share any of the data with them. Given that they were a collective subject of the survey, did they have a right to the information even though they chose not to participate?
- Potential Harm – My gut was telling me that if I pushed too much, I would destabilize the system and I wasn’t sure if the system could hold itself together. If I continued to focus on board-staff relations, there was a chance of jeopardizing board members’ status and reputation on the board. Additionally, focusing on the board’s lack of engagement could cause stress for the staff and make them feel less committed to their positions and the organization. Because I didn’t know the reasoning for the board’s lack of

participation, I didn't want to risk the staff feeling like they weren't doing enough or that the board didn't want to work with them.

After receiving support and approval from my supervisors, I decided to meet the organization where they were (Clarkson, 2002, p. 39) and to not inquire more deeply into the absent board, but to continue to work with those members of the system that *were* engaged: the staff, IBC, and ED. I was most concerned with how best to update the staff on the change in the project focus without losing them in the process, creating more of a divide between the staff and board, or holding back information they were entitled to have. I chose to communicate only what I believed necessary to remain honest and in service of the client system while maintaining engagement and not oversharing details for which I did not have all the information. Here is an excerpt from the update that I sent to the staff team:

> This project's original focus was to explore the staff and board's ways of working, both as unique groups and as a whole. Since the Staff Session on June 16th, our work with the board has revealed that they have more development work that they need to do as a board before they are ready to work with the staff. I will be working with the ED and IBC to help plan this work so that the board can develop a clearer vision of their roles in the organization before engaging in a whole-organization design workshop. (July 9, 2021)

I did not continue communication with the board but passed this task off to the IBC as it no longer felt like my place to facilitate this work.

The Intervention

Staff Priorities

I shifted my focus to the staff and their outputs from the sensemaking session. I felt like there was a blessing in this shift. The staff had been pouring their hearts into their mission-driven work and were experiencing difficulties in working collaboratively. I questioned whether the energy they gave to their clients (students) they were, in turn, giving back to developing themselves. I proposed that the staff choose two priorities to develop action plans for during the workshop. I sent each staff member an anonymous poll so they could vote on which priorities would most benefit the group to work on right now. These priorities were:

(1) build strategies to be more proactive and less reactive;

(2) boost communication and information sharing across teams;

(3) clarify the shared vision;

(4) clarify team goals and how support will be built across teams to reach these goals;

(5) clarify roles on their “ship”; and

(6) create a community of self-care.

The two priorities that had the highest votes were (1) build strategies to be more proactive and less reactive, and (2) boost communication and information sharing across teams.

When I received the poll results, I was surprised to see that only one staff member voted for priority #6: Create a community of self-care. During the project I had a sense that the staff team was overextended and needed a break, adding to my trail of energetic breadcrumbs. Many staff members expressed feeling overwhelmed and distracted during each check-in that I facilitated. I considered including this priority in the workshop despite its lack of popularity. I felt like it might be what the group truly needed. However, I quieted this voice and followed my established methodology to remain honest and forthright with my process and to avoid confusing the staff group.

From the beginning of my engagement with the client, my intention was to operate in partnership with them; offering them a process but giving them the space to do the work. This often looked like me offering a proposal or set of options and giving the client the freedom to make their own decisions on how to move forward. The situation above shows how despite my attempt to maintain a 50/50 partnership with the client I still reacted to their decisions when I felt they would benefit from digging a little deeper or going in a different direction (Block, 2011). I often quieted this voice out of respect for their decision-making process. I also didn't want to risk overcomplicating the project or losing their trust.

Pressure to Deliver

As I prepared for the workshop, I felt a lot of pressure from the staff team and the ED to design a process that would allow the staff team to walk away with clear next steps. At the end of the previous sensemaking session, the staff expressed their gratitude for the space and time to talk about important aspects of their work together but that they were also anxious to *do* something about it. They asked for a plan, a structure, the next logical step forward. When the ED, IBC, and I met to reassess the project and decide on the next steps, the ED stressed how important it would be to have the workshop produce tangible results for the staff. When I asked what she meant by this, she replied, "I'm worried that if the staff doesn't walk away with some action steps, then we will lose them" (ED, personal communication, July 2021). I later understood that she was communicating her concern about losing their engagement in the project due to their busy schedules.

My perception was that the ED was worried that the emergent and dialogic nature of the work might not be enough to engage her team given the circumstances (shifting project focus, busy summer calendars, preparation for expedition season, and a big capital campaign). I felt the pressure to design a session that would create a noticeable impact for the staff, and it felt heavy on my shoulders. My reaction to this feeling prompted me to take a more analytical and systematic approach to the designing and planning of the workshop versus a creative and open-minded one.

The Workshop

Staff Sensemaking with the IBC. The workshop began on a high note with the IBC joining the staff for the first hour to update the team on the current state of the board and to share her vision for the organization, specifically the board-staff relationship. The staff seemed to be highly receptive and there were a lot of positive expressions across the Zoom screen. During the rest of the hour, I facilitated a sensemaking process where I had a prepared a Mural board with four quadrants. Each quadrant included a different question or prompt for conversation. The first quadrant was populated with the themes from the staff survey question: “What does a strong board and staff relationship look like?” The next quadrant contained the prompt, “What has worked here previously, or at other organizations you have been a part of?” These were followed by quadrants, “What doesn’t work?” and “What is already happening here that is working well and can be built upon?” The last question I asked the group was, “What are some unanswered questions?”

A rich conversation ensued, with all staff members contributing openly and honestly. I observed all staff members speaking, including those that were new to the team and expressed how they didn’t even know what a board-staff relationship should look like. Other staff were direct in their request to have more engagement with the board. The conversation flowed and I sensed courage in the space rather than hesitation and discomfort. The staff made it clear that they wanted the board to better understand their work and they wanted more direct lines of communication to maintain healthy working relationships. There was more emphasis on the last quadrant's appreciative prompt, "What is already happening here that is working well and can be built upon" which I was not surprised by given the harmonious and positive affect of the group and my focus on taking a more appreciative approach to bring vitality and energy to a group that had expressed being overwhelmed and tired.

The group ended the hour by asking some very powerful questions that spurred a cascade of follow-up questions surrounding how the two groups want to build the relationship, e.g. "*How do we navigate the melding of our cultures? What work do we need to get done together? Where are the accessible opportunities for board members to be more involved? Is having staff at board meetings the best venue for building the relationship?*" Participants left for their break with enthusiasm, and one program manager was excited to join a committee. I sensed a renewed energy to reconnect with the rest of the organization.

Action Planning: Proactivity. I used the action planning framework developed by the Canadian Institute of Cultural Affairs (2009) that was introduced to me by my field supervisor (See Appendix D for revised framework). With the entire project being conducted 100% online, I prepared two mural boards, one for each top priority that was voted on by staff. While I doubted that we would have time to go through each priority, I planned for both scenarios.

The group began with their first priority: *to work more proactively together*. There was a lot of energy around this theme of proactivity as evidence by how much it was discussed in their sensemaking session. The staff felt like they were always one step behind, making it difficult to collaborate ahead of time and take advantage of one another's strengths. As I guided them through the action planning process I had designed, something began to unfold. With every progressive step of the process, the staff began to narrow in on one distinct issue that was alive for them…retention. My intuition about retention being a sticky issue for the group [from the beginning of the project] was affirmed and I felt like my chest was on fire. From my perspective as a facilitator, it was as if I was watching a barrel be pushed down a hill for the next hour. The barrel started rolling slowly and then as it picked up momentum it sped faster and faster down the hill until its massive size and force was unavoidable to anyone on the hill. An example of this momentum I witnessed in their discussion is copied below from the Consulting Report (See Appendix E for the full report).

> Working more proactively will allow us to be more intentional and not make rushed decisions…
>
> Rushed decisions create reactive emotions…
>
> Working more proactively will reduce animosity and confusion…
>
> Thus, opening up our ability to communicate and understand one another's priorities and creating time for more creativity…
>
> Working more proactively will reduce burnout and improve staff retention…

Retention Resurfaces. Participants returned from their breakout rooms where they worked to develop specific achievements that would signify their success in working more proactively. The top two prioritized achievements that were voted on by almost all participants were, "*90% of staff are the same from year to year*" and "*All staff understand the strategic plan and know their unique role in its execution.*" Up to this point in the workshop, there had been active participation by everyone, but I felt the energy in the virtual space building when I asked the group if these two achievements were accurate reflections of what the group wanted to move forward on into the action step phase. This question seemed to have hit a chord because everyone fell silent.

I had been progressively giving space for longer and longer pauses, but the silence soon became too loud not to intervene. I asked the group, “I’m sensing some tension around this first achievement of maintaining 90% of staff year over year. If my observation is correct, what about this achievement is so sticky?” While I may have been drawn into the system’s desire to structure a mechanistic action planning design, the workshop took a turn with this intervention. I was using myself as an instrument of change (Cheung-Judge, 2001), by noticing what was occurring in the group, incorporating the data from the project up that point, and checking in with the group to see if the underlying issue was revealing itself in the room (Conklin, 2021).

This achievement brought up some of the different perspectives that members of the group had around how problematic turnover is. Some members believed turnover was something to look at; others believed it was to be expected in a small caregiving organization that hires talented people early in their career to work with youth (Kahn, 2004). Others were more concerned about their level of burnout and wanted to know how they could manage their dwindling capacity without jeopardizing their self and community care. At this point in the workshop, I found myself reflecting on the group check-in where many members mentioned feeling overwhelmed, tired, and distracted. They were now labeling this burnout in the moment, and I asked them the following question, “What if the achievement is…staff members are revitalized by their work and not burned out?”

My question prompted the group to continue discussing their workload and how they could manage the day-day stress of work a little bit better. Through these difficult conversations, the group agreed on changing the achievement to, “*Ensure staff development and advancement are prioritized at every level of the organization*,” a suggestion made by the ED.

The remaining time in the workshop was spent breaking this achievement down into more manageable chunks for the staff to continue discussing. I was very clear and explicit with the group that we wouldn't have time to outline specific actions for the achievement given its depth and breadth, but that their courage in surfacing such an important issue was something to be proud of. Much to my surprise, after feeling like I had failed the group by not leaving them with distinct action steps, most participants checked out feeling grateful and hopeful for a new conversation that needed to happen.

Project Outcome and Feedback

I received real-time feedback from the staff participants at the end of the final workshop by using an anonymous survey (See Appendix F). All participants noted that the workshop was valuable or very valuable, that the intervention met a need of the group, and all but two responded that they were taking something specific away to apply to their work. The two that did not respond said they were unsure. Choosing to gather feedback at the end of the workshop was beneficial because I was able to take the pulse of the group in the moment. However, it didn't give participants time to adequately reflect on the workshop and the new learning and changes that might have occurred as a result. I also received individual emails from a few participants who thanked me for spending the time to work with them; but these responses weren't substantive.

I had two feedback meetings with the ED to discuss how she thought the project went overall. The first meeting was a debrief and in the second meeting I had prepared a questionnaire for her to fill out in advance to gather specific feedback (See Appendix G for feedback questions and responses). Her biggest takeaway as a leader was the importance of developing her leadership team's capacity to share diverse and sometimes divergent perspectives in front of the rest of the staff. During the workshop, she found herself surprised hearing the perspectives of other EMT members and was not sure how best to model challenging these perspectives with the administrative and program staff also present. Other project outcomes and feedback from the ED are discussed in the following sub-sections.

Including All Voices

Taking the time to invite and engage all staff including two interns in the work was valued. I believe that the project opened the space for full participation and inclusion, and it seems that many felt heard throughout the process. As much as I wanted to push forward with the action plan in the final workshop to feel a sense of completion (and feed my perfectionist), that is not what process consulting is about. My HSI professors had forewarned us that "…you will create a plan and agenda…however, as people come together and interact, it may be necessary to set aside the carefully wrought plan and deal with what is happening in the room" (Conklin, 2021, p. 172).

My role was to facilitate and guide a process that would allow all participants to feel safe, heard, and included. I acknowledged the voices that were hinting at an underlying issue and by responding with curiosity and compassion, I lifted their collective concern so that the group could examine it together. Letting go of the plan and making space for this conversation to happen highlights three important principles in process consulting: (1) be helpful, (5) allow the client to own the problem and solution, and (6) go with the flow while seizing targets of opportunity (Schein, 1997). In this situation, I accepted doing less with the system so that I could be helpful and present in the moment. I recognized their need to talk about retention and "take the monkey off their back" (p. 207). Finally, I went with the flow of the group, adjusted my expectations, and seized the opportunity to uncover an undiscussable (Schein, 1997).

New Conversations

Several new conversations were started as an outcome of the project. The first conversation was focused on the co-creation of a board-staff relationship that works for all. While the conversation centered on the staff and IBC, and the work to define the relationship with the board failed to happen, there was a renewed sense of hope and momentum to continue after I left the system. This type of dialogic process consulting, where interactions with individuals and teams allow them to confront limiting narratives, stories, and realities can create episodic change by generating new ways of thinking and new possibilities for the future (Bushe & Marshak, 2015).

Additionally, the staff began talking about retention which was an issue that impacted all of them. While they were unable to develop a full action plan, they expressed their concerns in a new way and surfaced different and sometimes divergent perspectives. This conversation led to a strategic discussion about staff development and advancement with some specific action items that the team can now continue to work on together. In my follow-up debrief with the ED she mentioned another piece of progress: the updated strategic plan now included a distinct budget line for each staff member to create a unique plan for their individual development with a supervisor or colleague.

New Leadership Relationship Develops

The twists and turns in the project fostered collaboration between the ED and IBC. The IBC played an integral role in modeling collaboration for the staff team and in remaining open to them forged the path to discovery during their sensemaking hour in the workshop. The ED and IBC were able to practice problem-solving together when the board did not respond and while they could have scapegoated the board or blamed them for the project needing to shift focus, they did not. Instead, the IBC modeled authentic mentorship by offering a new perspective to the situation at hand by embodying the organization's espoused mission and values with her response to a challenging situation.

The relationship I witnessed emerging between the ED and IBC felt strong and I have some confidence that their leadership will provide value to the organization as it navigates learning through change. Hiland (2008) suggests that "nonprofit leaders are the stewards of the well-being of individuals and communities" (p.10) and that "board chairs and executive directors comprise the key leadership fulcrum of their organizations" (p.10). I hope that these women continue to foster their collaborative relationship to bring about positive change in the organization and the day-to-day work experiences of the hardworking staff.

Realization about Board Involvement

The ED shared in her feedback to me that she had made assumptions about the board's desire to participate in the project and about their engagement in the organization in general (See Appendix G for the feedback response form). How an individual or group within a system responds to an invitation can reveal a lot about what might be going on in the system. While there was disappointment for the ED and IBC to learn that the board wasn't interested in the project, it showed them where they have work to do. This also demonstrated to me the importance of invitations, which I will discuss in the last sections of this report.

The organization members learned that there is a general lack of clarity about what the board does in the organization and how they relate with the staff. The project left both leaders asking the questions, "*Where does the work of the board happen beyond our well-attended quarterly meetings*?" in addition to "*Do we want to be a booster club, or do we want to engage in deep thinking about our organization?*" While these questions also need to be posed to the board, the realization had forced the leadership to look more deeply at their assumptions of where and how the work of the organization happens, and what their role is in clarifying the direction and building the foundation for visioning with an active board.

At my second feedback session with the ED in early October, I learned that the board had undergone some changes since I entered the system in December of 2020. What was first a 15-member board had been reduced to 12. Meetings were now taking place once every two months compared to quarterly, and the board was renamed the “leadership team” on their website. While some of these changes are a result of a new strategic plan and the introduction of term limits for board members, my work with the system succeeded in highlighting issues on the board that had previously gone unnoticed.

Capacity Issues

Like retention and burnout, staff and board capacity were revealed as an issue facing the system. As the project progressed, it became clear that there were capacity issues across the organization. The issue of having enough time is ubiquitous in the modern world of work. When we began the project, I didn’t notice any red flags that the system wouldn’t be able to participate fully but as we inched closer and closer to the intervention, it became more difficult to find the time to meet with staff. While we had scheduled the dates for the sessions and workshop early in the project, we weren’t left with any wiggle room, let alone the flexibility to add sessions further into the summer calendar. I think the project would have benefited from more sessions, but there was not enough capacity.

According to the feedback I received from the ED, there was an initial positive response from the staff after the final workshop but that their expedition season launched soon after and any momentum that was made may have been lost. Being aware of this possibility, I offered my time to the ED, IBC, or any staff members should there be any questions or concerns that they wanted to explore during the two months after the workshop. I also wrote a project report (See Appendix E) and talked the ED through the report including a few liberating structures (Liberating Structures, n.d.) that could provide a jumping off point for the group to begin having conversations in a new way with or without a facilitator. I added the liberating structures to the report because the ED and staff team expressed that they wanted to continue the conversations that were started in the workshop.

As a fledgling human systems intervener and process consultant, I needed to continually remind myself of where my job ended with the client system and what I am and am not accountable for. One of our goals in doing whole system change processes is to build capacity within the system so that they can continue to solve problems after we leave (Block, 2011). However, even with the best intentions and clear explanation of the work, the client might still be expecting the outcomes typical of expert consulting. Though the client may agree in theory with a participative process-driven approach to change, in practice, they may expect a clear ready-made solution (Block, 2011). As Schwarz (2017) noted:

> Even if I clarified what the group can expect from me, they may still have unrealistic expectations of how I can help them. This may have caused group members to feel ambivalent about me. On one hand, they may want and need my help, but they may also feel disappointed that I can't solve the problems they need to be solved. (p. 251)

Discussion

Relationship and Trust: Trusting Myself, Trusting the Client, and the Client's Trust in Me

My learning goals for this project were to focus on simplicity, build confidence in my decisions, and improve my timing. Trust was an important theme in my learning throughout the project: trust internally within the client system, between myself and the contract client, and within myself. From the beginning of the project, I was inclined to trust the ED. She resonated with the theoretical and philosophical underpinnings of process consulting and rarely questioned my proposals or approach. I wonder if her initial trust in me amplified my trust in her. From the beginning of our engagement, I expressed my observations, ideas, and curiosities very openly with the ED. This honest authenticity paved the way for a high level of trust between the ED and me (Block, 2011).

I made the mistake to believe that the trust developed between me and the ED would automatically extend to the rest of the system. I may have believed this because I assumed the level of open communication I was able to have with the ED must also be present in other parts of the organization. I assumed that if the ED was placing her trust in me to facilitate a change process then others would follow her lead. Of course, as I'm writing this it sounds absurd that I could have possibly made this assumption, especially given what HSI had taught me up to this point.

Desmond (2014) suggests that building a strong relationship with your client requires establishing a clear agreement on the intervention goals and clear tasks for each party. These types of relationship can also foster trust. I believe the ED and I developed this kind of relationship, however just because I had this type of relationship with the ED does not mean that my relationships with other individuals across system would be the same. Desmond (2014) also suggests that building trust with other group members in the client system should not be assumed, and that it might require my nurturing by "noticing subtle changes in the group to minimize relational misunderstanding, momentarily stepping into the group members' worlds without losing sense of my own and informing the group members of my experience after doing so" (pp. 28-29).

Building more trust with the whole system would have required that I invest more time into clarifying the project, agreeing on the goals, and developing the steps with more than just the ED and IBC. The Manifesto on Transformation of Knowledge Creation (Huang, 2010) refers to partnership in action research as the quality of the relationships formed with stakeholders and the extent to which these stakeholders engage with the design and assessment of the change process. While there is certainly a continuum of relationships to be formed and nurtured in a process consulting project, it is important to be intentional with these relationships and ensure that the appropriate level of partnership is established to meet the needs of the intervention goals.

One way that I am assessing how I partnered with the client system is how much the system engaged in the project, from contract to closing (Huang, 2010). While I considered forming a design team of interested staff and board members to co-design the intervention, I decided not to because the staff did not have the capacity and the board was not ready. From a conceptual perspective, I believe that involving more of the system in every aspect of the project would have resulted in a higher level of trust between myself and the client system and ultimately, stronger engagement. At the time of the project, however, time and availability were limited; capacities were stretched, in large part because of COVID. Therefore, I found myself making most decisions with the ED to promote ease and simplicity.

The relationships I built with my field supervisor and contract client helped me to trust myself throughout the project. I had limited time to meet with my field supervisor so when I did meet with her, I didn't have the time to process all my insecurities and questions on whether I was doing the "right" thing with the client. While sometimes I longed for a more intimate supervision relationship, I benefited from the practice of being more concise with my language and my decision-making process during times of uncertainty. When I updated her on the project and consulted her opinion on decisions that needed to be made, she instilled a lot of trust in me to forge ahead. As she challenged me to move forward with firm footing, she never made me feel like I was missing something important about the system or that I should be insecure about trusting my intuition. She was truly giving me the space I needed to learn how to be a process consultant with my client. This dynamic placed a loving pressure on me to trust my instinct and not look back as much as I normally might have.

Up until this time, all my consulting experience had been with a partner or co-facilitator during the HSI program. Not having a co-facilitator challenged me to trust myself more deeply. My HSI cohort is full of big and beautiful brains that I've had the pleasure of learning and collaborating with for over two years. While I love working in small teams, my insecurities have more opportunities to surface and make me question myself. During this project, I had to rely on myself and my intuition and skillset to carry me through. Without other people to work alongside, I also didn't have the opportunity to compare myself, which forged a deeper connection with myself and a greater opportunity to understand more about who I am as an intervener.

Examining Assumptions

Assessing Readiness and Commitment for Change

I designed a whole system intervention and only half of the system showed up. My observations and hypotheses about how the organization would participate were questioned completely during the middle of the project when I, the ED, and the ICB realized that the board was not going to participate. To this day, I still do not know why 12/15 board members didn't respond. I have come to accept that the reason may not be as important as I thought. While it was necessary for me to explore the lack of engagement, I needed to stop searching for answers because they were not yet accessible, and instead switch my focus to how I would show up for the rest of the client system. My focus is now on how I can better enter a consulting engagement with a potential client and how important it is to question my assumptions out loud throughout each phase.

Averbuch (2015) recommends asking questions that allow yourself as the consultant to listen for the following concerns that should be considered before engaging with a new system:

- Is the situation ready?
- Are the people in the system ready?
- Is the consultant ready?

In my client system, there wasn't a unanimous sense of urgency and complexity to solve one specific problem. There was, however, a desire for a new way of working together but I don't think it was urgent enough to motivate all members of the system to show up full of life and enthusiasm. Averbuch (2015) poignantly suggests that "Aliveness and vitality are energetic engines of novelty and improvement" (p. 222). I do believe there was an authentic willingness to engage in the project initially but that as a consultant I did not build enough readiness along the way by developing relationships and capacities as we moved through the phases of the project (Averbuch, 2015).

Too Many Changes and Not Enough Commitment. I assumed at the beginning of the project that the changes happening at the organization made them a prime fit for process consultation. There was an upcoming transition in board leadership, a new strategic plan, a big move to a new building, and the organization was navigating a global pandemic. To be honest, I didn't find any of these situations particularly unique. They seemed like common situational organizational changes. When I had reviewed the literature to explore any guiding theories early in the project, I rejected Bridges' model on transitions. Some of the data I gathered supported my rejection of the theory, namely the environmental scan that left me with the impression that system members simply wanted to build more purposeful relationships across the organizations and collaborate on a vision for the future. According to Bridges and Bridges (2016), if members were in fact in the neutral zone of a transition, I would have expected more obvious signs such as anxiety, low motivation, disorientation, doubt, absenteeism, or a lack of productivity.

Upon reflection and a fresh insight from one of my colleagues during my colloquium, I now realize that it's entirely possible that these changes were not only impacting organizational effectiveness but also members' ability to fully commit to the project. During the environmental scan, many system members felt unsure about what the future looked like, and they were eager to be more involved and aligned with creating and implementing the long-term vision for the organization. In retrospect, the timing of the environmental scan was a few months after the staff had done a SWOT analysis, but prior to them receiving feedback from the board on their ideas. Additionally, prior to the pandemic the board and staff had yearly potlucks and they had not gotten together in quite some time to meet new members. I may have underestimated these changes and how they were impacting the system, their ability to collaborate, their uncertainty about the future, and ultimately their capacity to commit to another project.

This ambiguity about the future may have represented a neutral zone for the system, where committing to engage in a pro-bono consulting project with a student consultant wasn't high on their list of priorities. This might have been more pertinent for the board as they were in the middle of a leadership transition, where a founding board member of 21 years was stepping down to bring in fresh eyes and ears. The board may have been floating in a neutral zone, an in-between time when the old ways are gone but the new ways are not yet in place (Bridges & Bridges, 2016). I'm not sure about this, but perhaps the lack of clear leadership and structure on the board during this transition reinforced the idea that this project was not important for them to commit their time to because they were not ready as a group. The board did not yet know who *they* were and what *their* roles were as board members. It seems that this work needed to happen first before they could begin to understand how to work with the staff.

Being Clear About What the Change Can Bring. With system members already questioning what the future looked like for the organization, it would have made perfect sense for there to be low motivation in taking the time to engage fully in a new project. In a change process we are asking the client organization to commit to doing something differently. If members don't have a full understanding of why doing something differently would help them with the problems they're facing, then it may reduce their motivation and commitment for involvement. During the feedback session the ED shared something she might have missed early on:

> I was so excited about the project, and the board was initially excited too, but when it came time to begin, they just handed it off to me. I don't think I brought them into the "why" and the importance of their broad participation. (ED, personal communication, September 2021)

As a consultant, I could have provided more of myself to help facilitate this conversation and prepare more opportunities for the system members to get to know me and discover why the project was important to the organization. I needed to be more conscious about building internal commitment throughout the project; instead, I assumed that the ED had already done this during the contracting phase. Obtaining and increasing organizational commitment is key to creating an impact in this work and this often involves removing obstacles that may be impeding system members' ability and desire to commit (Block, 2011).

The Outgoing Board Chair. I made another assumption about change readiness during the entry up to the decision to act phases of the project (Block, 2011). The trusting relationship I had built with the ED impacted how I chose the project focus and how I invited the system to participate. I made a mistake by not engaging the outgoing board chair in this process. When I asked the ED about his potential role in the project and the need for multiple perspectives, she didn't see a need to involve him as he was on his way out of the organization and was giving away much of his work to the IBC. He did receive the general board invitation, but not a personalized invitation during the environmental scan. When I made the choice to not interview the outgoing board chair or check in with him early in the project, I had a gut feeling that I would later regret it. This was another moment where I left an energetic breadcrumb on my trail.

I wonder what might have been different had I engaged him more in the project. I assumed that the ED was communicating all our decisions to her leadership team, but I'm not sure she was because I expected to hear from the outgoing board chair during the environmental scan. However, based on how he responded to the survey, I believe he would have been a huge asset in the project and could have potentially illuminated what was going on with the board. During the environmental scan, I attended a board meeting where the outgoing board chair facilitated the meeting and created space for me to share information about the project. At that time, he seemed quite interested. He was also the only other board member to RSVP for the sensemaking session. Despite these observations and my assumptions, I would have been better able to assess the whole system's readiness had I included him more in the project.

Another Boat Metaphor. Despite everything that I could have done differently or questions that I could have asked myself, at the end of the day I'm reminded of sailing on the ocean. It is a beautiful day with clear skies and not a cloud in sight, and just the perfect amount of wind for a gentle sail. The radar looks good and there's no sign of adverse weather. So, you glide out of the harbor only anticipating safe seas. Out of nowhere a squall roll in; you drop the sails and prepare to get wet, but you look back to where you came from and all you see are blue skies. Even when we do all that we can to capture a clear picture of where the system might be before we hoist the sails, we still might get halfway to our destination and be confronted with a storm.

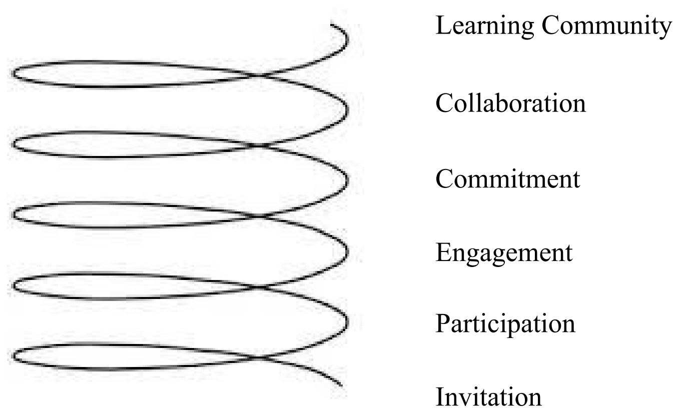
In these circumstances, an effective avenue is simply meeting the client where they are (Clarkson, 2002). In my project, this is what I tried to do. Without complicating or compromising our relationship and accomplishments, I took the next best step with the resources and support available to me. This sparked a new conversation that will likely result in changes in how the ED and IBC engage the board. While we didn't accomplish the initial goal of getting both the staff *and* board to explore their harbor together, we began the important process of building a ship worthy of high seas for the next season.

Being Clear About Who My Client Is

I maintained for most of the project that my client was the whole system, but I am unsure if I engaged them enough throughout. At the time, I thought that I was checking all the boxes in the process consulting handbook: involving multiple people from various levels and functions to participate in the environmental scan, joining meetings to introduce myself and the project, supplying the whole organization with my contact information should they have any questions or concerns about participating, proposing a project focus that involves the whole system, and providing multiple ways to engage (survey, sensemaking session, and workshop). When I reflect on the steps I took, I can see gaps where I could have updated members of the system and read the pulse of the organization at regular intervals during the ethics process when I was not in contact with the whole client system. Instead, I relied on updates from the ED and assumed that she was relaying important information about the project to the rest of the system (based on our bi-weekly check-ins I'm fairly certain she was but am not positive). I sent out formal invitations once we had chosen the project focus and I think I missed a big opportunity to be more intentional with how I invited system members to participate. According to the collaborative journey, the first and most important step to building collaboration in a human system is the invitation (See Figure 3).

Figure 3

The Collaborative Journey (adapted from Southern, 2006)[2]



[2] According to Southern (2006), the invitation to participate in the co-creation of a new collaboration reality is the beginning of the journey. The helix represents "the increasing arenas of participation from invitation to collaboration and ultimately engagement within a learning community" (p. 13).

The invitation serves as the foundation for communicating why a proposed change process is important to the organization, its community, and how individuals will benefit from being a part of the effort (Southern, 2006).

I dropped energetic breadcrumbs during moments when what I was sensing in the client system wasn't matching up with what was being shared with me. From the onset of the project, I had understood from the ED that board development was what was needed most in the organization. Based on what was discovered during the project, this was clearly a huge need. While I sensed this during the environmental scan, I also sensed a whisper for support from the staff. When I shared my observations with the ED, she responded that she had the utmost confidence in the staff. I trusted that she knew her organization better than I did but I didn't want to let go of my gut feeling and I was fixed on doing a whole system intervention.

Ultimately, I decided that by working with the board *and* staff to explore and define their working relationship and by visioning around the future I would help many aspects of the system during one project. The board would have a clearer role and responsibility within the system, the staff would be able to express their needs and be relieved from continuing to carry the organization, and the whole system would be able to start to develop a shared vision for the future.

Collusion in Collaboration

My understanding at the beginning of the project was that part of my role was to maintain a relationship with the contract client where we can make collaborative decisions together using input and data from the rest of the system. Throughout the project, I believed that I was consulting effectively by working from the stance that the whole system was my client while maintaining my main line of communication with the ED. I believe if I could go back in time, I would have asked myself who my client was to make sure I was truly acting in service of them. This might have changed the way I interacted with the ED and pushed me to create more relationships with both sub-systems earlier on and well in advance of the planned sessions.

I was influenced by my relationship with the ED and this collusion impacted my decision to not explore the staff dynamics earlier on in the project. Collusion is an “unconscious agreement between the groups and the consultant’s defenses with the indirect aim of avoiding discomfort” (Petriglieri & Wood, 2003, p. 336). The discomfort for me was disrupting the status quo too much within the system. I am not sure what the discomfort was for the ED, perhaps the family-like culture of the staff team made the idea of solely focusing on their dynamics intimidating and potentially disruptive.

The four proposals that I offered the ED were all designed to work with the whole system. This was based on my assumption that the whole system wanted to participate in the project. The choice that the ED made to focus on exploring and defining the relationship between the staff and board happened in a closed meeting with me. While I struggle to accept that this was a unilateral decision, it’s true that I didn’t consult other staff or board members to check in to make sure this was the right focus. From a systems perspective, the way that the ED made this decision could be reflective of her own failure to collaborate with other groups and teams across her organization (brown, 2017).

The ED’s choice was influenced by the process that I designed for this decision. At the time, I believed I was using a pure participative approach by involving a sample of each sub-system in the environmental scan, remaining neutral as I themed their data, and offering multiple project foci to the decision-maker in the organization (all foci highlighting participation from the entire system). However, what I failed to see at the time was that this process did not model a new form of collaboration which is what the organization needed. I undermined myself by behaving in a manner that was not consistent with the way of being I was advocating for in the system (Block, 2011). Instead, I fell into the system's dynamics and colluded with the ED by only collaborating with her. This impacted my ability to effectively intervene when my gut was telling me that something wasn't quite right or that I didn't have the whole picture (Kahn, 2004).

In future client projects I plan to ask myself throughout the process, "Who is the client now? Is it the person I am speaking with? Is it the group the person represents? Or is it the whole organization?" If I discover there is a mismatch between who I believe to be my client and who my actual client is, this could reveal a lot about how I am partnering with the organization, specifically the mindset, thoughts, and assumptions that guide how I relate with different members of the system (Petriglieri & Wood, 2003). I might discover this by observing how much time I spend collaborating with different subsets of the client system, how I make decisions on next steps (and with whom) and ensuring that these processes are consistently inclusive of those who will be most impacted by the change.

Implications for Authentic Process Consulting

Participation and Partnership

I learned a lot about what I could have done differently to achieve better engagement and commitment in this project. As I walk away from this experience, I want to look towards the future and how I will continue to strive to find my most authentic self as a consultant. While I now have new resources that will allow me to take better stock of the organization's readiness for change, there will always be unexpected shifts that will impact even my purest intentions. I will strive to continue to remain open and meet the client where they are.

During my colloquium, a friend posed an important and compassionate question, "Maybe it is not about becoming an expert on engagement but about how you show up for the client when this happens… as an intervener, what impact does disengagement have on you?" My sense of self is impacted when I experience disengagement within myself or those around me and I am less able to show up authentically and whole-heartedly. Kahn's (1990) study on the psychological conditions of personal engagement and disengagement highlights the feelings that come up for me. First, I may begin to question if my work still holds *meaning* and whether it is worth pursuing: If others don't think this is valuable, why should I continue? Second, I may begin to feel vulnerable and *unsafe*: I'm not going to continue taking risks if I can't trust this system to hold me. Lastly, I may lose *energy* to continue doing authentic work: I can no longer be present with this system (Kahn, 1990). These conditions live on a spectrum based on the status of my own mental health. Despite where I am on the spectrum, if members in a future client system disengage, I will need to take care of myself to ensure I remain committed to our cooperative inquiry. Knowing this, I will need to develop some new tools so that I can maintain my commitment to helping organizations.

To be an effective partner with my future clients I need to be able to explore the reality of their situation, build the right kind of relational bond for their multiple realities to surface, and be ready to participate fully in the process of bringing about a new reality (Schein, 2006). The right kind of relationship will differ depending on the client and the context around the change that is being proposed. Conklin (2021) suggests that there is no single recipe for a client relationship and that categorical assertions should be avoided when working with human systems. "It may be in that some people in some circumstances a warm and empathetic relationship is needed and with other people and in other circumstances this is not the case" (p. 100). I believe finding the appropriate relationship and building the most effective partnership with each client will be a learning journey full of successful and failed attempts to find the right balance.

Mindful OD Practice

As I open the doors into a career path in organization development and process consulting, I must come back to the foundations of HSI and continue to tune myself as instrument. One practice that I have already established that will help me in this quest is mindfulness. As human systems interveners, we are trained to pay attention to both the conscious and unconscious patterns within and around us. This practice of paying attention happens in the present moment but it also takes place outside of the present moment, when we are reflecting on our behaviors, actions, thoughts, and feelings. Harvard social psychologist Ellen Langer relates mindfulness to learning:

> When we are mindful, we implicitly or explicitly (1) view a situation from several perspectives, (2) see information presented in the situation as novel, (3) attend to the context in which we perceive the information, and eventually, (4) create new categories through which this information may be understood. (Langer, 1997, as cited in Yeganeh & Kolb, p. 3)

Looking at mindfulness from the socio-cognitive perspective and comparing it with how I gather impressions and data from people, I see that it is tempting for me to categorize information quickly. I yearn to see patterns and start making sense by way of connecting ideas using what they have in common. However, by doing this I am not giving enough time to see new information as novel. In qualitative research methods, we consume data through all our senses and begin to put this data into categories of themes. I tend to sort data whether I am conducting research or simply having a conversation with colleagues.

Approaching my work with client data from a socio-cognitive perspective of mindfulness will help me become a better intervener as I pay more respect to new information and be more intentional with how I am organizing information so that it can be understood more accurately. In addition to being mindful, Schein et al. (2001) recommend "accessing your ignorance" (p. 10) to see and listen with fresh eyes and ears by dropping what you know or had previously thought and joining the client in their own process. I look forward to working on this skill in tandem with my own humility as I develop into a process consultant.

Letting go of labeling organizational behaviors as good or bad will also reduce my ability to be an authentic and mindful process consultant. Without being fully open to how members of the system are perceiving their organizational situations, it can be easy to over-analyze and build correlations that may not be helpful to create the desired change. For example, the subject of retention can be contentious and there may not be an immediate neutral opinion on what it means for an organization. Poor retention can be interpreted in many ways and there may be varying underlying emotions associated with how it is experienced by different people in the organization (Dunoon, 2014).

By practicing mindfulness in my relationship with the system and not immediately assuming that retention is a problem that needs solving, I can meet members of the system where they are and facilitate a process for them to explore and inquire into the different perspectives in the room. This mindful approach will continue to spark thinking about everyday ways of being and working in new ways to create change (Dunoon, 2014).

Lastly, if mindfulness helps to release tension in my mind and help me be more open to new and different information, then I can intentionally think, behave, feel, and create in new ways. Yeganeh and Kolb (2009) suggest that practicing mindfulness improves adult learning and organizational effectiveness. Focusing on the present moment and becoming aware of our own learning process through mindfulness develops our capacity for more conscious experiencing, reflecting, and acting. By practicing this as a process consultant, I can model a different way of being so that members of the client system can try to do the same (Yeganeh & Kolb, 2009).

Relational and Intuitive Knowing

For the last year and a half, I've been itching to move more. The combination of graduate school, a global pandemic, and several uncertainties in my personal life have closed me in. The HSI program initially helped me to rekindle my interest in somatic awareness. At the beginning of this process consulting project, I met a local OD practitioner who shared her wisdom with me as I was navigating the initial complexities in my client system. She suggested that I move. "Move your body and note what it feels like when you decide to move…how does this connect with how you work with your client" (Deborah Bicknell, personal communication, May 28, 2021).

She was teaching me about intuition and learning through my body. She was also teaching me about decision-making, one of my three learning goals. Unfortunately, I didn't build a movement practice during this project. I was too full of anxious energy and kept my nose to the grindstone, moving forward using my head and heart but not enough of my body and intuition. The result was a feeling of disconnection. One of my biggest takeaways from this experience is to prioritize personal and professional practices that strengthen my embodied knowing through becoming more conscious (Lawrence, 2012).

Throughout this report, I've mentioned moments where I had a gut feeling or other moments where I left energetic breadcrumbs so that I may find my way back to times where my intuition was doing the work that my mind could not. When I began to investigate energetic breadcrumbs, I came across *implicit relational knowing*, or a knowing that is experienced in our bodies but has not yet been put into words (Boston Change Process Study Group & Nahum, 2008). I felt this strongest after conducting the environmental scan where I sensed an underlying tension in the staff team. Even after checking out this feeling and the perceptions I associated with it, my body held on to this knowledge throughout the project.

In the Western culture that I've been raised and indoctrinated into, intuition is rarely valued as a means of developing knowledge. I suspect many of the people I will work with will also be accustomed to quieting their intuition. Thankfully, the teachings of HSI have highlighted intuition as a valid way of knowing. In our training, metaphor, dance, meditation, and theater are practiced as ways of embodying knowledge within ourselves so that we can use an embodied pedagogy with our future clients (Boston Change Process Study Group & Nahum, 2008). This is also referred to as presentational knowing (Heron & Reason, 2008). In my project with the client, I facilitated a metaphorical discovery exercise when I felt like they needed to get out of their heads and into what was lying just below the surface of their reality. When we use our imaginations and engage in presentational knowing it allows us to dip into the unconscious and come out on the other side with a something to make cognitive sense of in our current world (Heron & Reason, 2008). As interveners and process consultants we have a huge opportunity to leverage this rich and dynamic form of knowing to help individuals in human systems make sense of their current realities and imagine new possibilities:

> As the inquiry process develops, cycling between action and reflection, presentational knowing is the most basic way of making sense of our experience. Often this is in the form of stories which we bring back to our colleagues in the inquiry group. We will not rush quickly

> into propositions, but will hold open the presentational and imaginal space and allow it to do its sense-making magic, allowing our stories to resonate with those of other group members. (Heron & Reason, 2008, p. 373)

The more I can connect with my own body, work creativity with others in uncovering new ways of knowing, and remain suspended in imaginal space, the more effective I will become at intervening in and surfacing the energy for the human systems I work with to create their own positive change.

Conclusion

This report helped to deepen my understanding of myself, process consultation, and of the small nonprofit that opened its doors to me exactly one year ago. The route was long, winding, and full of scenic surprises. Much like what I've heard about in this work of process consultation and experienced first-hand while on boating expeditions, little went according to plan. In the end, I helped in supplying new tools and materials for a passionate group of intrepid sailors to become a collaborative crew.

The title of this report messily mimics my own experience of engaging in this project as I reflect on the ebbs and flows that captured my attention as I guided the client system through a process of exploring and discovering a different way of talking and hopefully, working together. While I was tempted to veer off or dive in closer to the root of the systemic cause of disengagement on the board, I stayed the course so that I could provide something helpful for the staff team that had been waiting on the dock since December.

I learned about myself as an intervener and accomplished my learning goals in a multitude of ways while also failing at them in other ways. The very writing of this report accomplished all three of my learning goals in addition to a previous learning goal I set for myself in the HSI program. I took a simple approach (just write!); I made the decision to begin so that I could finish; I improved my timing; and I accepted that it would not be perfect.

As I begin the process of closing this chapter of learning, I also grieve the ending of something so difficult, confusing, and invigorating. With this ending, I can rest and revive my senses so that I am able to continue doing work with open eyes and ears. I feel truly grateful for this experience, and I cannot wait to see what happens next.

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Appendix A

Staff Survey Questions

1. Please describe how the Staff communicates (examples: patterns of communication, subjects of conversation, technologies used, how many voices are heard? etc.).
2. Please describe how the Staff collaborates (examples: generates ideas, makes decisions, holds each other accountable, how work moves around, how a team works on a project together, etc.).
3. When thinking about how the Staff team currently works together…
    a. What do you want to drop? (e.g. what's no longer working?)
    b. What do you want to keep? (e.g. what's working well?)
    c. What do you want to create?
4. What would a really strong Board and Staff relationship look like to you? Please list at least 7 elements.
5. How would you describe the current state of the Board and Staff relationship and ways of working together? (You may list current elements, processes, describe a metaphor, etc.)
6. What do you need to feel fully supported and engaged when working?
7. Please use this space for anything else that is coming up for you. Additional comments or concerns?

Appendix B

Board Survey Questions

1. Please describe how the Board communicates (examples: patterns of communication, subjects of conversation, how many voices are heard? etc.).
2. Please describe how the Board makes decisions (examples: patterns, formal processes, who makes the decisions? etc.)
3. When thinking about how the Board currently works together…
    a. What do you want to leave behind? (e.g. what's no longer working?)
    b. What do you want to keep? (e.g. what's working well?)
    c. What do you want to create?
4. What would a really strong Board and Staff relationship look like to you? Please list at least 7 elements.
5. How would you describe the current state of the Board and Staff relationship and ways of working together? (You may list current elements, processes, describe a metaphor, etc.)
6. What do you need to feel fully supported and engaged when working with others?
7. Please use this space for anything else that is coming up for you. Additional comments or concerns?

Appendix C

Sensemaking Session Design

1. Welcome to the Session (20 min/10:00-10:20)
    a. Check-in:
        i. How are you entering this space today?
        ii. What is one hope that you have for this work together?
    b. Set the Conditions: Introduction and Purpose
    c. Norms: "Mutual Learning Mindset Mash-up"
2. Present the Staff Themes (5 min/10:20-10:40)
    a. These are the themes that came out of the Survey that you completed, these themes are particular to your work as a Staff team.
    b. Do these themes still resonate with you? What are you noticing?
    c. Knowing that this will be our only opportunity as a full Staff to work with these results, I wanted to spend the rest of the session working with a predominant theme that will be meaningful to all of you. After sorting through your responses, I found myself to be curious about the term collaboration, what it means for you, how it plays out in your day-day, and how you might like to improve collaboration. Collaboration is an abstract term and I wonder if it would be beneficial to break this down in how it plays out within your work teams. How does this sound?
3. Collaboration- What does it mean to you/what does it look like? (10 min/10:40-10:50)

Write responses on Mural stickies

Prompt* Rapid popcorn

4. Share the model- These 5 elements all impact collaboration. What stands out to you? Do you notice any connections or gaps between your brainstorm and these elements? (10:50-11:00)
5. Metaphor Exercise 1 (11:00-11:20)
    a. Metaphors can be effective because they allow us to make sense of and understand our experiences in new ways. They can make the implicit explicit and provide new insight into how we are experiencing reality. In visioning work in organizations, they provide an outlet for dreaming and creativity and building positive energy for the future. I've chosen Metaphor today as a lens for you to explore collaboration.

[Send Mural Link and Give Instructions on how to Zoom in and out to choose their image]

    b. Please take 5 minutes to choose an image that reflects how you feel the team is currently collaborating and an image that reflects how you want to be collaborating. Journal for a few minutes on why you chose these images. (5 min)

[Share sound- music]

    c. I'm going to split you up into pairs to share your images and reflect together. *Please share the time between the two of you and try to not jump into asking lots of questions or problem-solving right away, simply listen and remain curious. Once both have shared, please discuss any insights you have and reflect on the following questions. Be prepared to share in the larger group.*

    Questions to consider, but no need to answer them all:

    1. What do you notice about the current vs future images of collaboration?
    2. What capacities do you already have to achieve this new state?
    3. What capacities do you need to achieve this new state?
    4. What questions do you need to be asking yourselves to realize this change?

(15 min/11:10-11:25)

[Post Instructions in Chat and Create breakout rooms with a timer]

d. Greet everyone back into the main room and ask for each group to share some insights and/or questions from their reflection together. (25 min/11:25-11:50)

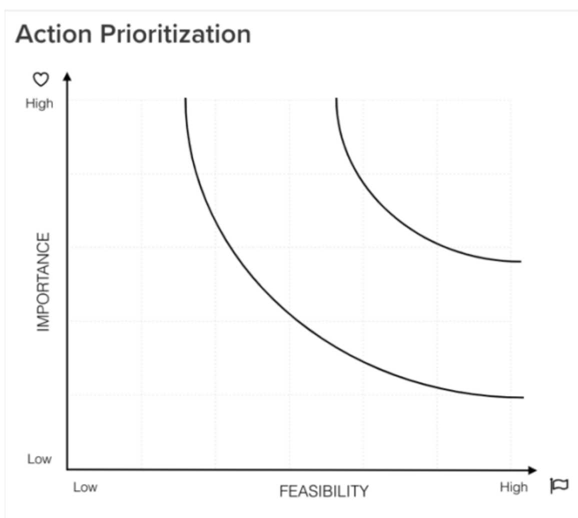
[Document on Mural- But don't Share Screen]

6. Share poll (1 min)
7. Check-out (10 min)
    a. Takeaway from today
    b. One-word feeling leaving the space

Appendix D

Action Planning Template (Modified to fit the needs of staff group)

1. Name of Strategy:
    a. Why is this strategy important?
2. Possible Achievements—achievements should be able to be demonstrated. It might be helpful to think about what will be different when this is achieved. State as an outcome, not an action.
3. Measurable Achievement Brainstorm—successful achievements are catalytic, realistic, impactful, and inspire commitment and real action.
4. Final Measurable Achievements—which are the most exciting? Scary? Take the most energy? Easiest/take advantage of your strengths or weaknesses? Which must occur first?
5. Defining Actions
    a. What are the specific actions needed to complete each measurable accomplishment?
    b. Prioritize these actions on the graph below…

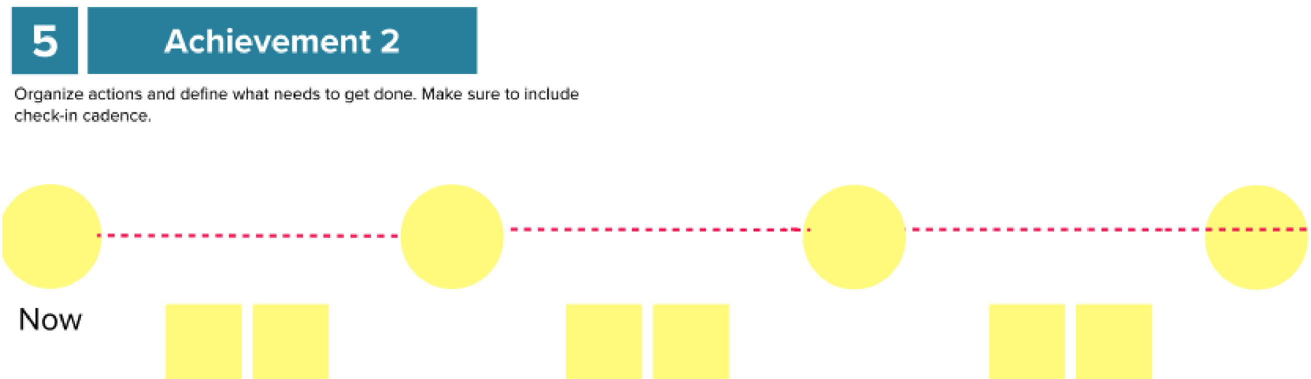


6. What tools and resources do you already have to accomplish this?
    a. What are you missing?

b. What could block you in the process?

c. How will you check in when something is not working?

7. Organize actions and define what needs to get done on the timeline below. Make sure to include check-in cadence.



Appendix E

Consulting Report August 2021

Organizational Development Report

August 2021

Kelsey Johnson
MA Candidate in Human Systems Intervention
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Introduction

During the Spring and Summer of 2021, I worked with [redacted] as a process consultant as part of the Masters Program in Human Systems Intervention at Concordia University. This report provides a high-level overview of the work that we did together. The first two pages describe the process that we took including how the focus of the project was decided, how data was gathered, and the session and workshop that were designed to address the focus. Pages 4 and 5 outline the predominant themes and priorities that emerged throughout the project. First, how working more proactively and less reactively will allow the Staff to be more collaborative in their work together, and second, the specific achievements that the Staff would like to work towards in order to realize a new level of proactivity. Page 6 outlines the specific outputs the Staff defined together at the end of their final workshop. Pages 7 and 8 outline my recommendations as a consultant and suggested frameworks for future conversations as the [redacted] Staff team moves forward on their chosen achievements.

I hope that you find this report to be a helpful resource as you move forward into the Fall and continue your important work together.

Process

The process that we took in this project was to first explore what the organization wanted to pursue as a focus in their work with me. I met with [redacted] to learn about [redacted]; their work, mission, history, current goals, and culture. I also learned about the transitions that the organization had gone through in the last four years and some of [redacted]'s hopes for the future of the organization.

Gathering Information: I started what is called an "environmental scan" during which I had conversations with a total of eight Staff and Board members. The purpose of these conversations was to gather impressions on what might be going on in the organization and to hear different perspectives on what is going well and where there might be room for improvement in the organization. These conversations also gave me the opportunity to assess the capacity for change within the organization and to make sure that members from the organization were interested and willing to participate in the project.

My Observations from the environmental scan:

- The Board has been undergoing a cultural transition and members are not sure how best to maintain connection to the heart of the organization and its mission.
- There is a lack of clarity on the future, particularly related to how the Board and Staff will work together.
- There is a desire on part of the Staff to collaborate more with one another and the Board on long and short-term vision, particularly related to the work of the Strategic Plan.
- There is a need for a better way to share knowledge and information with one another.

Deciding on a Scope of Work: I shared the above impressions with [redacted] and offered four project areas that we could work on together. It was decided that exploring the question, "How do [redacted] Staff and Board want to work together to build the support and capacity needed for the opportunities that lie ahead" was both a timely and compelling focus that appreciated the current state of the organization.

Invitation to Participate: Organizational change projects are most impactful and successful when they involve the entire organization. Not only do diverse perspectives boost innovation, but research shows that when people are involved in their organization's change process that it is more likely to stick. The greater the participation and ownership is internally, the less reliance on external intervention down the road.
The project focus was shared with both Staff and Board members and I prepared a Scope of Work that went through an intensive ethics review by Concordia University's Ethics Board. While the project was being approved, [redacted] and I began to schedule three proposed Workshops within a quickly approaching busy summer schedule.
Upon approval of the project all Staff and Board members were invited to participate in multiple ways: a survey, a sense-making workshop, and a final workshop.

Process Continued

Gathering Information Specific to the Project Focus: In order to design purpose-driven sessions for [redacted] Staff and Board members I needed to gather more focused information on how the Staff and Board worked together, as well as how the Staff team and the Board members worked together as individual groups. I designed an anonymous survey for each group (containing the same questions) and invited members to participate. The results from these surveys would then be shared with participants to make sense of and inform the design of the final workshop.

Shifting Gears: Shortly after the surveys were sent out and all Staff and Board members were invited to participate in the project, it became clear that the Board was unable to participate and we made a decision to shift the focus of the project to working solely with the Staff. To change the focus of the project I used qualitative methods to theme the Staff responses to the survey questions that pertained to how they work with one another. A predominant theme emerged around collaboration, so the first Workshop was designed for the Staff to make sense of what collaboration meant in the context of their day-day work, and how they might begin to work more collaboratively together.

Staff Sense-making Session: This two-hour session was intended to share the themes from the Staff survey so that the group could "make sense" of the data together. One predominant theme was collaboration, as the data showed that there was a desire to work more across teams. Much of the session was dedicated to the Staff exploring collaboration; how they defined collaboration, how they were currently collaborating, and where the gaps were. They also used metaphor to explore the type of collaboration they wanted to build within their [redacted] teams. Four priorities emerged from this session and the Staff were given the opportunity to choose which two priorities they most wanted to work on in the final Workshop.

Staff Workshop: With the Board not attending the Workshop, we decided to have the incoming Board Chair, [redacted] join the Staff for the first hour of the Workshop so that they could discuss the type of relationship the Staff would like to have with the Board moving forward. This also created the opportunity for [redacted] to share her hopes for the Board and her openness in co-creating the relationship with the rest of the organization. The remainder of the Workshop was dedicated to the Staff exploring what working more proactively would allow them to do and what they would like to achieve together moving forward. The major themes and results from the Workshop are outlined below with recommendations beginning on page 5.

Prioritizing Staff Collaboration

During the Staff Sense-making Session participants discussed what working more collaboratively would open up for their teams, especially during the busy season when capacity is limited. They also used metaphor to explore the type of collaboration they want to build within their [redacted] teams.

During this exploration, Staff listed the capacities that they already have to achieve the desired level of collaboration, the capacities they need, and the questions that need to be asked in order to realize the change.

The following six themes emerged as potential priorities to more deeply develop as a Staff team in order to work more collaboratively moving forward:

- **Build strategies to be more proactive and less reactive.**
- **Boost communication and information sharing across teams.**
- Clarify team goals and how support will be built across teams.
- Clarify Staff roles on the [redacted] "boat".
- Clarify the shared vision as a Staff.
- Create a culture of community self care (for additional support during times of stress).

These six priorities were sent out in a poll for Staff to vote on the top two priorities that they were most interested in developing an action plan for. Following all the votes, #1 and #2 were chosen by Staff as being the top priorities.
The Staff Workshop was designed for Staff members to build out these top priorities and outline some action steps to move forward. Due to time constraints, Staff only had time to work on Priority #1: Building strategies to be more proactive and less reactive.

Tip: Build intention into meetings. When planning a meeting, be clear and share what the meeting goals will be, e.g. share information, advance thinking, improve communication, build capacity, make decisions, or provide input.

Why is working more proactively important for [redacted] Staff?

- Increases efficiency in the short term
- Allows Staff to be more intentional with their long term work
- Improves collaboration on internal teams and allows Staff to take advantage of external collaboration opportunities
- Helps Staff communicate more effectively with one another and [redacted] families
- Opens up more understanding of others' priorities
- Creates more time for creativity
- Reduces burnout and improves staff retention

The Staff worked together in small groups to develop specific achievements that would signify their success:

1. **Staff development and advancement are prioritized at every level of the organization.**
2. All Staff read and understand the Strategic Plan, and have quarterly check-ins to ensure execution and collaboration.
3. Each Staff member knows that their individual strengths are being used on a day-day basis to not only reduce burnout but to create more capacity.
4. Staff meetings and other avenues of communication lead to sharing information, especially across departments.
5. All teams understand what is needed and why.
6. [redacted] Staff has a culture where acknowledgement and ownership of organizational success is shared regularly.

While all six of these achievements were important to Staff, #1 and #2 were voted as top priorities. Achievement #1 was what we focused on for the remainder of the Staff Workshop.

Tip: Keep the other achievements alive by setting time aside as a team to move these ideas into action items

[redacted] Organizational Development Report 2021 Pg. 5

Prioritizing Staff Development and Advancement: Outputs

Establish a system to document this work

Revisit hiring processes, are there gaps where improvements can be made?

Build upon the onboarding process, how can the process mirror the culture you want to create into the process?

Co-design training and development plans for each staff person

1. What types of training programs will orient you towards your goals, inspire, and foster joy?
2. How best can the organization provide the support and structure for training?
3. Begin a conversation around staff advancement: what kind of plan will meet both the needs of the individual and the organization?

Consider the exit process and how you can learn from turnover as you experience it

Tip: Create a motivating image or slogan that reflects the spirit of the new staff training and development program and incorporate it into your planning process.

Recommendations

1	**Consider using the [redacted] Mentorship Model internally** A great strength that the Staff team already has is the mentorship and relationship-building model that they use with students. Choose up to 3 practices from the [redacted] model that can be adapted and applied with your teams and when working across departments.
2	**Talk about turnover** The Workshop focused on developing strategies to be more proactive brought up an issue around retention. Staff turnover and retention seems to have many layers, some of which were difficult to talk about. There may be unresolved feelings about turnover and how it impacts the small Staff team at [redacted]. Having an open and honest conversation with the intention to share, test out assumptions, and seek to understand, versus solve the problem might help get everyone on the same page as you move forward with revisioning the Staff Development and Advancement Plan.
3	**Explore Staff advancement** Start a conversation about how best to meet the needs of both the individual and the organization in the updated advancement plan. Explore non-monetary rewards and incentives. Consider a 3-year plan that builds in responsibility and ownership. Collaborate on this plan with the entire Staff.
4	**Consider creating an HR responsibility or seeking external HR consultation** With much of the Staff at capacity and the yearning to prioritize staff development and advancement, it will be necessary to allocate time and resources to do this work.
5	**Incorporate practices of community care** Retention and "burn-out" became a predominant theme in our conversations. Consider the cultural elements that you would like to incorporate as a small Staff team that does emotionally and physically-intensive work with students. Some jumping off ideas are to host intentional meetings, develop multiple feedback mechanisms, and participate in group trainings (specifically for those that work in the helping profession).

[redacted] Organizational Development Report 2021 Pg. 7

Recommended structures for future group conversations

The following processes are called "Liberating Structures". Work teams usually use presentations, managed discussions, open discussions, status reports and brainstorm sessions in routine interactions, but these structures can often be limiting or disorganized. Liberating Structures adds 33 more options to these conventional approaches that are simple, expert-less, results-focused, adaptable, inclusive, and foster innovation.
You can find all of the Liberating Structures at their website, but I have listed the ones I think would be most fitting for the Trekkers team here.

(Keith McCandless & Henri Lipmanowicz- www.liberatingstructures.com)

TRIZ

- Make it possible to speak the unspeakable and get skeletons out of the closet
- Make space for innovation
- Lay the ground for creative destruction by doing the hard work in a fun way
- TRIZ may be used before or in place of visioning sessions
- Build trust by acting all together to remove barriers

https://bit.ly/2Yo4c4q

15% Solutions

- Have people discover their individual and collective power
- Reveal bottom-up solutions
- Share actionable ideas and help one another
- Build trust
- Remember unused capacity and resources
- Reduce waste
- Close the knowing-doing gap

https://bit.ly/3tlFihy

What I Need From You

- Learn how to articulate functional and/or personal needs clearly
- Practice asking for what functions and/or individuals need
- Reestablish and/or improve communication inside functional clusters
- Make progress across functional silos
- Get all the issues out on the table at the same time for everyone to see
- Reduce frustration by eliminating preconceptions and rumors
- Build trust so that group members can share accountability with integrity

https://bit.ly/2WWvhuK

Conclusion

[redacted] is a small non-profit with a huge impact. As an external consultant it was very clear to see the dedication and commitment that the Staff and leadership have to the organization's mission and day-day operations. Staff participation in this consulting project was very high despite its evolving schedule during a busy summer after a long year of pivoting due to COVID. Their commitment to their work showed up in how they dug deep into specific ways they would like to work together moving forward.
It can be difficult to do this type of work as it forces colleagues to surface issues that may be challenging to talk about, such as turnover and burnout, however these conversations are essential in order to begin working towards a more desired future. The achievements that the Staff collaborated on defining are a tremendous jumping off point as the organization moves into a new season and continues to build out the Strategic Plan. I hope that these achievements continue to galvanize Staff teams into taking small steps towards a way of working that honors all the unique strengths that each individual brings to [redacted].

Thank you for your hard work and insight throughout this project and for trusting me to work with the amazing [redacted] team.

Appendix F

Post-Workshop Feedback Poll

User	Date & Time	How Valuable was this for you?	Did the session meet the purpose of creating action steps for working more proactively together?	How engaged were you throughout?	Did this move your team forward?
1	7/20/21 14:34	Extremely Valuable	Yes	Mostly engaged	Yes
2	7/20/21 14:34	Extremely Valuable	I'm not sure	Mostly engaged	Yes
3	7/20/21 14:34	Valuable	I'm not sure	Mostly engaged	Yes
4	7/20/21 14:34	Valuable	Yes	Very engaged	Yes
5	7/20/21 14:34	Valuable	Yes	Mostly engaged	Yes
6	7/20/21 14:34	Valuable	I'm not sure	Somewhat engaged	Yes
7	7/20/21 14:34	Extremely Valuable	I'm not sure	Very engaged	Yes
8	7/20/21 14:34	Valuable	I'm not sure	Mostly engaged	Yes
9	7/20/21 14:34	Extremely Valuable	I'm not sure	Mostly engaged	Yes

Appendix G

Feedback Questions Sent to Contract Client

Overall Project:

Project Feedback Questions

1. What is your overall impression of our time working together from environmental scanning to the final workshop?

There was a lot of value in making time for this intentional work and bringing the team together. Having an outside voice to facilitate the discussions was invaluable. Kelsey had an amazing ability to move with us as new topics and organizational realities were surfaced.

2. What impacts do you think the process we undertook together had on the organization?

It certainly surfaced some realities of where we are at the Board level and where we need to grow. It was powerful to have the Board chair as part of that discovery.

The staff team?

I think they felt heard and valued because we took the time to do this work and include their voices.

On yourself?

It was a great reminder of the power of an outside facilitator as well as the importance of taking the time to make sure I am aware of where everyone is coming to the project from. When you work with folks every day it is easy to make assumptions and assume you know where they are at.

3. Is there anything that stood out to you as positive? Are there any negative repercussions or unintended consequences because of our work together?

Making the time to hear each other's voices were very positive. Nothing negative, just surprising. I was way off on my understanding of where the Board was at and their commitment to this work. I would put this down as a positive because having this information will allow me to do a better job meeting them where they are at and moving us all forward.

4. Is there any other feedback that you have heard from the team about the project?

There was immediate positive feedback about the session, but then we moved right into expedition season, so any momentum was lost.

Our Working Relationship:

1. How did I partner with you as a consultant?

Very responsive to the changes that kept coming up. I felt very informed of each step and felt safe to share and to allow others in the team into the process and to share.

2. What worked well in our working relationship? What could have been improved?

I thought our working relationship was great. I trust you and your feedback. There was a lot of room for improvement, but it seems out of our control (in-person, timing, capacity)

3. What was your impression of my capacity to work effectively with the team? (In what ways did I support effectively? Where could I have improved?)

You did a great job quickly building trust and the container for our work. You made everyone feel heard and your responsiveness to what you were hearing – as opposed to just pushing forward with the plan you come in with – was very effective.

4. Is there anything else that you would like to share about the experience?

I so enjoyed working with you and found the process very valuable. The time constraints were very frustrating, so I felt like we were unable to give you our best or get the most out of the process.