ROLE ADVICE PROCESS GUIDE

Using Loomio

The role advice process (RAP) is designed to help an IMG worker find meaningful work.

At different times in our working lives, we feel more or less aligned with what we are good at, love doing, and is beneficial to the business (and the broader world).

Through this practice, we can seek ways to adapt our roles to find deeper alignment, engagement, and meaning.

This practice is based in self-reflection and feedback/advice from others.

HERE ARE THE REQUIRED STEPS:

- Choose a peer mentor
- Announce your RAP
- Create a Loomio thread
- Gather feedback/advice
- Make a proposal
- Share your final decision
- Take action

DETAILED STEPS:

1. Peer Mentor

Peer mentors provide guidance and encouragement through your process. Choose someone you trust to be both candid and supportive, someone who knows the steps (it's helpful if the person has had some solid exposure to past RAPs), and can help you process the feedback/advice you get from others. It's probably best if your mentor is not also an advisor.

2. Announcement

In Teams, announce your RAP to at least your intact team, chosen advisors, at least one Whole Forum member, and Tim Masson*.

Include the following information:

- At least a basic description of why you are doing a RAP (ex. feedback from a coworker, self-reflection, change in circumstances)
- Your chosen advisors and an invitation to any co-worker who wishes to provide feedback/advice
- The date you plan to communicate back your results (recommended two weeks and not more than a month from your announcement) Here's a sample announcement:

Hi team,

I'm announcing my RAP. Over the least two months, I've been thinking that I'm ready for a new challenge and so I'd like to investigate what's out there for me. My chosen advisors are Peter, Paul, and Mary and if you have feedback or advice for me that you think will help, please let me know. My deadline to make a decision is May 30th. Jane

A note on choosing advisors:

Plan to get feedback/advice from at least three co-workers, and not more than seven. You might exceed seven when people self-nominate, or new information is uncovered.

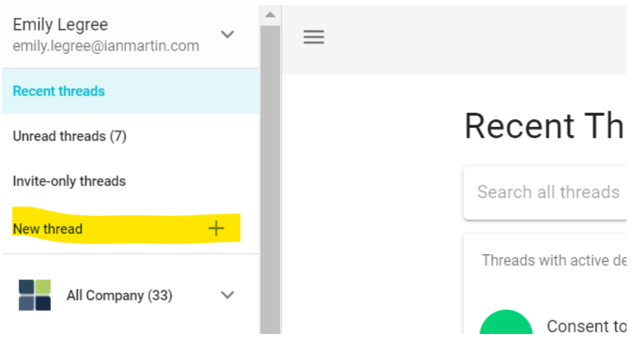
Good advisors are those who can help you clarify what you're good at, love doing, and especially, what might be beneficial to the business. Choose advisors that will both challenge and support you.

*Why Whole Forum members and Tim?

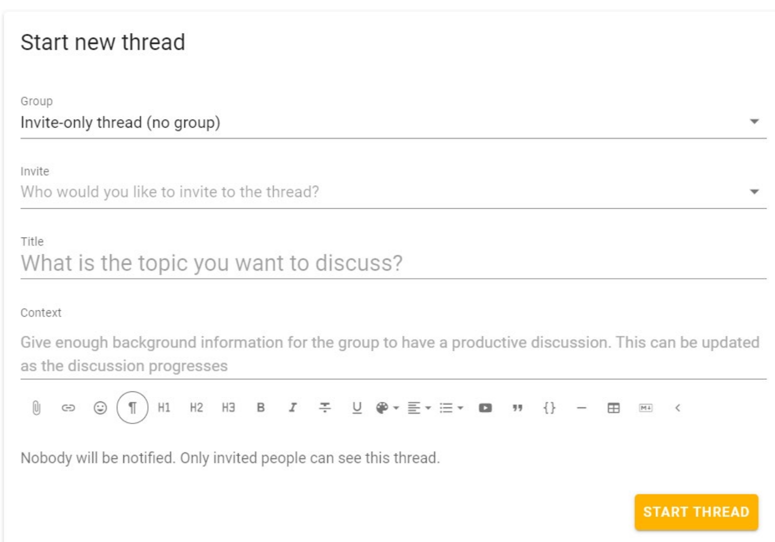
Whole Forum members and Tim can provide cross-organizational perspectives – including information from other teams and brands.

3. Create your Loomio RAP Thread

1. In Loomio, click on the "New Thread +" post option in the top left to start your own private 'invite-only' RAP thread.



2. In the new window that comes up, fill out the necessary details of your RAP. Entitle your new thread "*PERSONS* ROLE ADVICE PROCESS". Enter the email addresses of the people you want to participate in your RAP and put in the context of your RAP. Then click "Start Tread" to create the thread and send out the notifications.



***If you would like to wait to add your invitees to the thread, you can skip this part until after the thread is created, at which time you can go into the "members" tab in the thread to invite participants.*

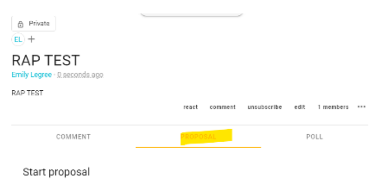
Next, in the thread, post your self-assessment. These questions are meant to help you with your self-assessment.

- Why am I doing this advice process? What steps led to this?
- What are my strengths, talents and interests? Where is the best place for me to use these?
- What contribution am I currently making to the team? What's working well? What could be better?
- Could I increase my impact by shifting or changing my role? In what ways specifically? What would be gained? What would be lost? Who would assume my current duties?
- How do I feel about this potential change? What am I worried about? Excited about?

4. Gathering Feedback/Advice

Speak with your advisors and then ask them to record a summary of their feedback/advice in your Loomio thread.

5. Loomio Proposal



Review your self-reflection and the feedback/advice of others in your Loomio thread.

All things considered, what do you think should happen next? Some options may include:

•Changing your role or accountabilities

•Changing your compensation

•Proposing a transition plan for yourself, i.e. if you don't think there's a place for you at this company, you could propose reasonable notice period and how you will use that time Note that your responsibilities could include:

•A plan to cover any responsibilities you are leaving behind

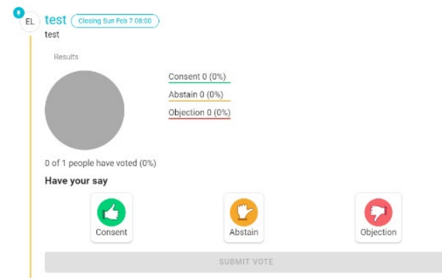
•Confirmation that there is budget/headcount for any role you are entering

When you're ready, go back into your Loomio thread and create a "Proposal" using the decision tools on the top right of the page. Title it "*PERSON'S* PROPOSAL", write your proposal under details, give a deadline (two business days is typical), and tag all of your advisors.

Advisors can now respond in two ways:

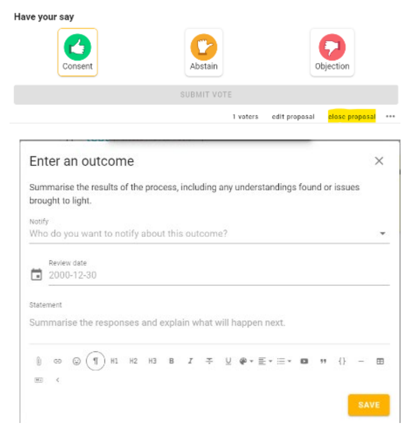
- They can ask clarifying questions and/or give reactions in the comments
- They should use the collective agreement buttons as follows:
  - **Agree** = I agree or can live with it
  - **Abstain** = I don't know enough or am not impacted
  - **Object** = I cannot live with this*

**At this point, the conflict resolution practice may be needed.*



6. Final Decision

Once you reach collective agreement on your proposal, it's time to make your final decision. Click on "close proposal" and then fill out the new window "Enter an Outcome" to post your final decision details.



7. Take Action

Take action to implement your new role, ex. appropriate announcements, transition plans, etc.

Any decision that involves significant change in responsibility or salary, or a termination of employment, should be documented at least in BambooHR, and written notice of any decrease in responsibility or salary, or any termination of employment, will be provided by the company via its HR representatives.


WHAT'S GOOD FOR BUSINESS
WHAT I'M GOOD AT
WHAT I LOVE TO DO