

A Year-End Review

Chapter 33 of *Appreciative Moments* ©Ed Jacobson, Ph.D.

What better way to celebrate and elevate the year that's rapidly drawing to a close than by conducting an appreciative year-end review?

I first began facilitating this type of review with one client group about four years ago. Just last week, we finished our fourth annual one. And last year, Jody and I spent a good portion of our holiday week doing an Appreciative Inquiry of our marriage. As a result, I've become a big fan of taking the time to savor the blessings of the year and openly acknowledging its attendant challenges, losses, and unbidden tragedies. We know that it wasn't all good, and we shouldn't pretend otherwise.

Here are some practices for conducting an appreciative year-end review in your workplace. But first, three suggestions:

- Do not wait until after New Year's. It's guaranteed that all interest and motivation for doing this review will be lost, and last year will be, as they say, "sooo last week."
- Set aside an hour. You probably won't need more time, and you might use less. Don't rush through it.
- Do not substitute this retrospective for your annual lunch or dinner with staff members. Your associates, like armies, travel on their stomachs. Unlike an army (or perhaps like one), they rely on their eggnog around this time of year. Same thing for your family. Don't deprive them of their traditional holiday dinner, or they'll turn on you. And it won't be pretty.

PRACTICE

Here are some suggested steps. Feel free to adapt, modify, or discard any or all of them, and to grow your own.

For Your Work Group

1. Bring Your Work Group Together: Have a flip chart or two available.
2. Construct a Time Line: Demark January–December on the x-axis at the bottom of the page. Divide the flip chart page into three horizontal stripes, using dotted lines to mark them off. Label the top one "Community/World," the middle one with the company or group name, and the third one "Personal."

3. Identify Notable Events: Ask people to brainstorm notable events that have taken place this year (they need not be positive, just notable), in these three categories, in the following order. And please remember the cardinal rule of brainstorming: everyone's right.
 - Community/World Events. Using 2007 as an example, you can expect entries such as continuing war in Iraq, lead-up to primary elections, Dow hitting fourteen thousand, and other world-shattering events. Expect some surprises. None of us, no matter how much we fancy ourselves as news junkies, can retain twelve months of stuff in our conscious minds.
 - Notable Workplace Highlights. Again, these may not be all positive.
 - Notable Personal Highlights. Again, not all positive.

This three-part exercise usually takes fifteen to twenty minutes. It jogs everyone's recollections and provides a nice container for a year's worth of events and recollections. It sets the stage for the next exercise: storytelling.

4. Storytelling: If the group size is seven or less, you can have each person take a turn doing the exercise. If eight or more, consider dividing folks into storytelling pairs. Have them tell stories of the following two sorts:
 - A high point of the year for you at work
 - A high point of the year for you in your personal life

If you have seven or fewer people present, go around the group, giving each person one minute to state a high point for work and one minute for a personal life high point. Be generous with those who ramble a little, but then don't be shy about encouraging them to wrap it up. Everyone knows who the filibusterers are. (Being a certified filibusterer, I know this to be true). And everyone wants them to cut it short.

For eight or more, have people form pairs. Give each member of the pair two minutes (i.e., one minute per high-point story), then have them switch roles. When they're done, reconvene as a group. Have each person briefly state the highlights of each high-point event that his partner related. The person can ask his storytelling partner for an accuracy check on what he said. You might want to write the workplace highpoints, and possibly the personal ones, on a flip chart page.

5. Envision the Year Ahead: Use an appreciative scenario to project ahead for the coming year. For example, with my client group, I used the following invitation: What is one daring-but-doable wish you have for yourself in your personal life in the coming year? And what is one daring-but-doable wish you have for yourself in your work life in the coming year? You can divide a flip chart page down the middle. Label one column "Personal," the other "Work," and write down key words.

6. **Wrap Up:** When everyone is done, simply ask, “How was this appreciative year-end review for you?” There will likely be plenty of comments. This is a graceful way to achieve closure.

For Families

You can apply the storytelling aspect (step 4) of the foregoing practice. For storytelling, you can suggest stories about two highpoint events: one about work or school, the other for personal life. Unlike the work group version, where time is at more of a premium, you can allow five minutes per high point, so people can share stories, rather than just mentioning their high points.

When all have shared their stories, go around the table or room and ask for a high-point story about your family in this past year. See what pops into people’s minds. Then conclude with a question about hopes and wishes for the coming year. Phrase it in language that fits your kids’ frames of reference: for example, a cool thing that I hope happens in the New Year ... or an awesome thing I’m wishing for in the New Year. This is not intended as a magic wand or genie-in-the-bottle kind of question. Therefore, instruct them that the hope or wish be something that could happen, if everything were to fall into place.

A note on high points or notable events that are not appreciative: It’s entirely possible (in both the workplace and family setting) that people will mention setbacks, losses, and the like. Be sure to make it safe and okay for them to include these. You can then encourage them to reflect for a moment on the question, What lessons have you learned from this event that will help you in the coming year? This is a graceful and effective way of acknowledging the adversities they have brought up, and the impact that these events have had on them, and gently moving the person to embrace what is life giving in it, even in the aftermath of a truly terrible happening.

A final note: You may already have a family tradition of year-end retrospectives, appreciative or otherwise. Feel free to adapt any of the suggestions and practices in this chapter to your current traditions. The beauty of a year-end appreciative review is that it permits us to use the calendar as a reminder to pause, acknowledge, and celebrate what is truly important. Think of it as an oasis: a fertile place for travelers to replenish and renew before forging onward.