

ON PAR WITH CULTURE CHANGE: GUIDING PRINCIPLES AND PRACTICAL STRATEGIES FOR A COLLABORATIVE JOURNEY (PART 2)



Session Co-Leaders:

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Description:

In this interactive session, you will learn how one organization, Schlegel Villages, embarked on a strengths-based, collaborative approach to culture change guided by Appreciative Inquiry, which is both an effective organizational change strategy and a participatory action research methodology. Through a variety of experiential exercises and activities, you will learn how residents, family members, and team members from all levels of the organization worked collaboratively to: 1) discover their strengths; 2) share their dreams for a more ideal future; 3) design aspiration statements to put their dreams into words; and 4) develop goals and action steps to turn their aspirations into operational realities. By the end of this session, you will walk away with practical tools and strategies to help your organization embark on a collaborative and rewarding culture change journey.

In this session, we will...

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| 1. Conduct a reconnaissance of your organization's culture |
| 2. Reflect on the differences between a traditional, problem-based approach and an appreciative approach to culture change |
| 3. View and summarize a practice example from Schlegel Villages' culture change journey |
| 4. Identify ideas and tools to help your organization get started on an appreciative culture change journey |

1) RECONNAISSANCE OF YOUR ORGANIZATION'S CULTURE

YVONNE SINGLETON

< />
Honouring Individuality
 &
Fostering Strong Communities
 / >

Below, please **rank** the long-term care, assisted living or retirement living community you are most familiar with along each of the continuums below. Then, in groups of 3 or 4, please **introduce** yourself and **state** your community's greatest area of strength and need for improvement. What similarities or differences do you discover? We will **hear** a sample of responses.

Institutional Model of Care	1 2 3 4 5 6 7 8 9 10	Social Model of Living
Focus on care	1 2 3 4 5 6 7 8 9 10	Focus on living (and care)
Scheduled routines	1 2 3 4 5 6 7 8 9 10	Flexible routines
Staff rotate	1 2 3 4 5 6 7 8 9 10	Staff assist same residents
Decisions <i>for</i> residents	1 2 3 4 5 6 7 8 9 10	Decisions <i>with</i> residents
Environment = workplace	1 2 3 4 5 6 7 8 9 10	Environment = home
Structured activities	1 2 3 4 5 6 7 8 9 10	Planned, flexible & spontaneous activities
Hierarchical departments	1 2 3 4 5 6 7 8 9 10	Collaborative teams
Staff care <i>for</i> residents	1 2 3 4 5 6 7 8 9 10	Mutual relationships
Us and them	1 2 3 4 5 6 7 8 9 10	Community
<i>Overall average:</i>	_____	<i>(total score/9)</i>
Your community's area of greatest strength: _____		
Your community's area of greatest need for improvement: _____		

*Table content adapted from Fagan, R.M. (2003). Pioneer Network: Changing the Culture of Aging in America, *Journal of Social Work in Long-Term Care*, 2(1/2), 125-140.

2) PROBLEM-BASED VS. APPRECIATIVE APPROACH TO CULTURE CHANGE

KRISTIE WIEDENFELD

Please **listen** to the following definition of AI and then **develop** one powerful question about AI (a probing question; perhaps even a critical question). Please **write** your question in the space provided below. We will **hear** sample of your questions, and by the end of this session, we hope to address each one.

Appreciative Inquiry

Appreciative Inquiry (AI) is the cooperative search for the best in people, their organizations, and the world around them. It involves systematic discovery of what gives a system 'life' when it is most effective and capable in economic, ecological, and human terms. AI involves the art and practice of asking questions that strengthen a system's capacity to heighten positive potential. It mobilizes inquiry through crafting an 'unconditional positive question' often involving hundreds or sometimes thousands of people. In AI, intervention gives way to imagination and innovation; instead of negation, criticism, and spiraling diagnosis there is *discovery*, *dream*, and *design*. AI assumes that every living system has untapped, rich, and inspiring accounts of the positive. Link this 'positive change core' directly to any change agenda, and changes never thought possible are suddenly and democratically mobilized. (Cooperrider and Whitney, 1999, p. 10)

My question about AI:

Please **reflect** on the differences between a traditional, problem-based approach to culture change and an appreciative approach. Then, quietly **consider** the questions on the following page and record a few words/ideas to help capture your response. We will **hear** a sample of responses.

Traditional Problem-Solving	Appreciative Inquiry
Focus on 'what is wrong'	Focus on 'what works'
Identification of problems	Appreciating and valuing the best of 'what is'
Search for root causes of failure/decay	Search for root causes of success
Fix the past	Create the future
Obstacles treated as barriers	Obstacles treated as ramps into new territory
Often top-down	Always collaborative

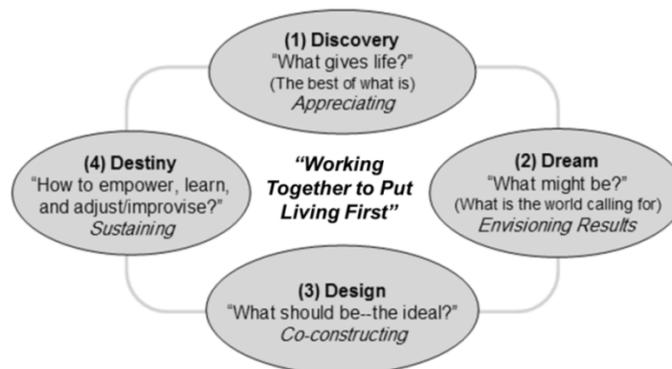
- How do these two approaches relate with your culture change (or other change) experiences?
- Is there anything that you would add or delete from the table?
- Which approach would you rather participate in, and why?

3) PRACTICE EXAMPLE FROM SCHLEGEL VILLAGES

CHRISTY PARSONS AND JENNIFER CARSON

Please **watch** this video about our AI process and how the *aspiration statements* on page 7 were created. As you watch, please use the space provided on the following page to **summarize** ideas or **jot** down questions.

Appreciative Inquiry 4-D Cycle



Notes, Comments, and/or Questions about AI Process
Preparation: <i>We asked, “How do we meaningfully engage all stakeholder groups?”</i>
Discovery: <i>We asked, “What gives life to the Villages when they are at their best?”</i>
Dream: <i>Guided by our discoveries, we asked, “What are our dreams for an ideal future?”</i>
Design: <i>We asked, “What would the Villages look like if they were designed perfectly to help us accomplish our dreams?”</i>
Destiny: <i>We asked (and continue to ask), “What specific activities, actions and processes will enable us to achieve our dreams?”</i>

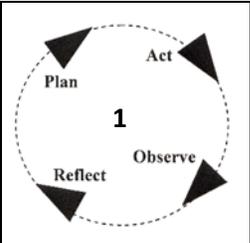
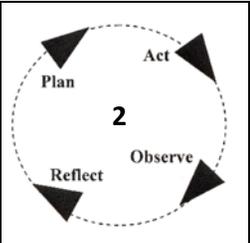
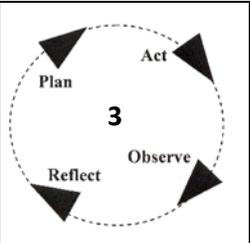
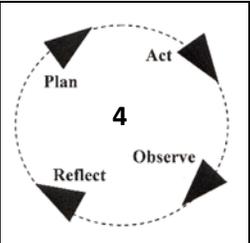
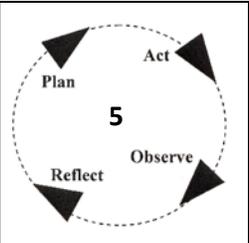
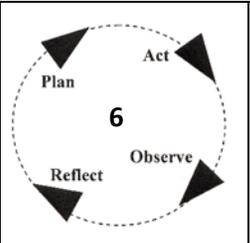
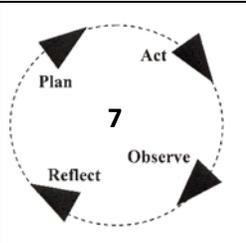
What questions do you have about our AI Summit?

Now please **listen** to Jennifer’s brief review of our culture change journey through the Destiny cycle of AI. You can **follow** along by looking at the summary table on page 6, and you can **gauge** Schlegel Villages’ progress in terms of self-reported outcomes by looking at the table on page 8.

Food-for-Thought

In the early years of AI work, the fourth *D* was called *Delivery*. But this cycle of the AI process emphasizes planning for **continuous learning**, **adjustment** and **improvisation** in the service of shared ideas. The word *Delivery* did not go far enough to convey this **‘flexible unfolding’** as people connect, collaborate, co-create, reflect, and make adjustments. So the name was changed to *Destiny*.

Schlegel Villages' Culture Change Journey through 7 Participatory Cycles

						
2009 Jennifer's Reconnaissance	2009 Schlegel Villages' Reconnaissance	2010 Appreciative Inquiry Summit	2011 Working Toward Our Aspirations	2012 Building a Collaborative Culture	2013 From Huddles to Neighbourhood Teams	2014 Reflecting on Our Culture Change Journey (In Process)
<p>Reviewed long-term care (LTC) and culture change literature</p> <p>Reflected on my experiences as a LTC and retirement living professional since 1987</p> <p>Identified lessons-learned and the values and assumptions she brings into the culture change context as a 'guide'</p> <p>Shared her self-understandings with potential partners at Schlegel Villages</p>	<p>Engaged 140 leadership and frontline team members in dialogical education, consciousness-raising, and collaborative learning about culture change at annual operational planning retreat</p> <p>Made the decision to embark on a culture change journey with strong consensus</p> <p>Selected Appreciative Inquiry (AI) to help guide the culture change process</p>	<p>Formed the Support Advisory Team (SAT) to guide the culture change process</p> <p>SAT planned the AI Summit</p> <p>Held AI discovery focus groups at each Village</p> <p>SAT facilitated a 3-day AI Summit with 180 Village members and developed aspiration statements</p> <p>Conducted an evaluation of the AI Summit</p>	<p>Developed operational planning goals based on selected aspirations</p> <p>Shared success stories at annual leadership retreat</p> <p>Broadened engagement through culture change events (e.g., Roadshow, Conversation Cafés, and Pioneer Network Conference)</p> <p>Focused on authentic partnerships and collaboration at annual operational planning retreat</p>	<p>Developed operational planning goals based in selected aspiration statements</p> <p>Formed a Village Advisory Team (VAT) at each Village</p> <p>Broadened engagement through culture change events</p> <p>Focused on quality of life (QOL) and interdisciplinary collaboration at annual operational planning retreat</p>	<p>Developed neighbourhood-specific operational planning goals based on top-5 and bottom-5 quality indicators (QIs)</p> <p>Held daily, neighbourhood, quality shift huddles</p> <p>Neighbourhood teams did root-cause analyses on top-5 and bottom-5 QIs</p> <p>Broadened engagement through culture change events</p> <p>SAT planned a reflection and critique</p>	<p>Continuing all actions from Cycle 6 and added quarterly neighbourhood team development days</p> <p>Reflecting on and critiquing our journey through Conversation Cafés, QOL surveys, interviews, and research reflection retreat</p> <p>Sharing our story with other organizations through presentations, publications and the development and dissemination of a guidebook</p>

The following aspiration statements were generated from our AI process:

Promote cross-functional teams

In our Village, *all* team members are engaged with every aspect of resident life by fostering collaboration through leadership, coaching, mentoring, education and critical reflection within each neighbourhood.

Create opportunities for meaningful and shared activities

Life purpose is achieved in each of our Villages through daily life filled with meaningful and shared activities. Our residents, family members, team members, volunteers and community partners engage in a vibrant Village life through mutual experiences and learning. We recognize that the most natural activity can provide fulfillment and growth. We create opportunities for meaningful and shared activities by giving permission to each other to explore new activities with our residents. We also educate everyone on the importance of community living and support residents in defining what activities are meaningful to them.

Connect research and innovation to Village life

At our Villages, we effectively communicate with all Village stakeholders (residents, families, team members and policy makers) the results and implications of research on aging through various channels including weekly communiqués to Village team members on topics affecting our residents, face-to-face presentations and electronic and digital resources. Our research communication plan engages the Villages in the research process by integrating research results into Village policies and practices. At the same time, it integrates research results into professional development programs for staff and into College and University curricula. This research communication plan increases the profile of the Villages to government, LHINs, prospective residents, the research community and the general public. As a result, residents, families and team members are informed, involved in, and excited about the culture of innovation within the Villages.

Offer flexible living

At our Villages we offer flexible living for each resident. Flexible living means the freedom for residents to choose what they want, when they want it, and how they want it, whether it is a bath, a recreational program or any other aspect of daily life. Our commitment to flexible living is made possible through educating all staff about the importance of promoting and respecting individuality. Residents are supported to make self-directed decisions regarding all aspects of daily life. As such, our systems and practices literally flex to support residents in achieving their individual preferences.

Foster authentic relationships

At our Villages, authentic relationships begin by knowing each other personally and are fostered through mutual respect. Authentic relationships occur when Village members are present with each other, and they flourish when we honour the unique personalities, contributions and life stories of every Village member.

Honour diversity in Village life

Our Village is a recognized community of acceptance. Everyone is consulted, included and respected in their spiritual, cultural and lifestyle choices. We offer a full range of programs and services for achieving individual life purpose within our diverse community.

Promote resident empowerment

Our Villages understand that empowerment is a fundamental human right. Our empowered residents are supported by team members and families in fulfilling their life purpose. This is supported by education, knowing each resident as an individual, listening, learning and unconditionally supporting our residents' right to choose. Our residents are our leaders.

Offer flexible dining

Our Villages are celebrated as industry leaders for our flexible dining program. Our flexible dining honours the residents' abilities to make choices regarding all aspects of dining including mealtimes and food choices. Our flexible dining invites the broader community to the table, ensuring plenty of room for families, friends, visitors and team members to share in the ritual of eating together. Our homemade and fresh baked meals are tailored to honour individual preferences, and our dining services are offered with care and dignity, ensuring a comfortable and enjoyable experience for each person.

Schlegel Villages World Café Data

Collaborative, Dialogical Assessment of Organizational Culture

Ratings provided on a 10-point scale: 1 = (low) institutional and 10 = (high) social

Institutional Model	Operational Planning Retreat September 2009 17 Tables/140 Village Members	Leadership Retreat May 2011 17 Tables/160 Village Members	Leadership Retreat May 2013 18 Tables/140 Village Members	Social Model
Focus on care	Average: 4.2 Range: 1-7 Mode: 3	Average: 6.1 Range: 5-7 Mode: 6	Average: 7.4 Range: 6.5-8 Mode: 8	Focus on living (and care)
Scheduled routines	Average: 2.6 Range: 1-8 Mode: 2	Average: 5.1 Range: 4-7 Mode: 5 & 6	Average: 6.2 Range: 5-8 Mode: 6	Flexible routines
Team members rotate	Average: 5.4 Range: 3-8 Mode: 5	Average: 7.5 Range: 5.5-9 Mode: 8	Average: 7.8 Range: 5-10 Mode: 8	Team members assist same residents
Decisions <i>for</i> residents	Average: 4.8 Range: 1-8 Mode: 4 & 6	Average: 6.3 Range: 4-9 Mode: 5	Average: 7.3 Range: 5-9 Mode: 7	Decisions <i>with</i> residents
Environment = workplace	Average: 5.6 Range: 1-9 Mode: 7	Average: 7.6 Range: 6-9 Mode: 8	Average: 7.7 Range: 5.5-9 Mode: 8	Environment = home
Structured activities	Average: 3 Range: 1-7 Mode: 1	Average: 6.1 Range: 3-9 Mode: 7	Average: 6.7 Range: 5-8 Mode: 7	Planned + flexible + spontaneous
Hierarchical departments	Average: 4.8 Range: 2-9 Mode: 3, 4 & 5	Average: 6.7 Range: 5-8 Mode: 7	Average: 7.4 Range: 6-9 Mode: 7	Collaborative teams
Team members care for residents	Average: 6.2 Range: 3-10 Mode: 5 & 7	Average: 7.2 Range: 4-10 Mode: 8	Average: 7.8 Range: 6-9 Mode: 8	Mutual relationships
Us and them	Average: 6.0 Range: 3-9 Mode: 6	Average: 7.9 Range: 7-9 Mode: 8	Average: 8.2 Range: 6.5-9 Mode: 8	Community
	Overall Average: 4.7	Overall Average: 6.7	Overall Average: 7.4	

4) IDEAS AND TOOLS TO HELP YOU GET STARTED

MARG CRESSMAN

Please **find** a partner. One of you will **play** the role of the interviewer and the other will **play** the role of the interviewee. Please take about 5 minutes to explore the questions below. We have provided a space for you to **take notes**. Then we will ask for a few volunteers to **share** what the interview experience was like.

Interview questions:

1. Please think about a great day that you enjoyed at our community; a day when you felt the happiest you have ever felt about working, living or visiting here. Describe it. What factors made it meaningful? What came together to make it happen?
2. What strengths or contributions do you bring to our community?
3. Take a moment to dream and visualize the community you really want. What does this dream look like? What is happening? What 3 things would help to create this future?

Name of person interviewed:

What day or type of day did your partner identify as 'great'?

What factors made this day especially 'great'?

What strengths and contributions does your partner bring to your community?

What is your partner's image of an ideal future?

What things would help to create this future?

LEARNING CIRCLES

~ INSTRUCTIONS ~

In a learning circle, “each participant is given the opportunity to speak without being interrupted or judged. The learning circle draws out shy people and encourages those who are more talkative to listen. Everyone has a chance to examine their own views and those of other circle members, leading to broadened perspectives and a wider base from which to build relationships and discover solutions.” (Shields & Norton, 2006, p. 94-95)

Learning circle steps:

- Each learning circle will need a **facilitator** and a **note-taker**.
- 8-12 participants sit in a circle with a clear view of one another.
- The facilitator’s role is to pose each question (one per time around the circle) to members of the circle, offer encouragement and keep responses moving along in a timely fashion so that everyone has an opportunity to speak.
- The note-taker will write down suggestions, ideas, questions, and/or action plans that emerge from the discussion. You may use the worksheet on back.
- A volunteer goes first, and then a person sitting beside the first respondent goes next, followed one-by-one around the circle until everyone has an opportunity to speak on the subject without interruption.
- Cross talk is not allowed.
- One may choose to pass rather than speak when it is their turn. After everyone else in the circle has had their turn, the facilitator goes back to those who passed and offers another opportunity to respond.
- Then (only after you have gone all the way around the circle), the floor is opened for general discussion before moving on to the next question.

Are there any questions before we begin?



LEARNING CIRCLE NOTES

Topic:

Facilitator:

Note-taker:

Names of Participants:

Learning Circle Question

Notes

Action Items