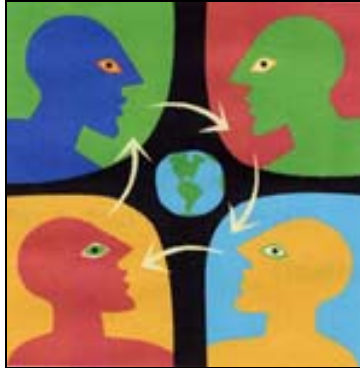


Words Create Worlds, September to December 2007



Congratulations to nine newly certified AI Facilitators: **Mallika Albert**, Synergy Health Systems; **Barbara Altenburger**, Mental Health Association of Southeastern Pennsylvania; **Duane Dykes**, Mental Health Association of Southeastern Pennsylvania; **Nancy Goodman**, Labyrinth Presentation Services; **Mikki Lynn**, Solutions by Mikki, LLC ; **Deidre McAdam**; Flowing Wells High School **Noel Tiano**, Nevada Center for Ethics & Health Policy University of Nevada; **and, Wendy Hall & Maggie Stuart**, Lower Columbia College who completed their practicum together.

You can attend a refresher if you like for the cost of materials and food only. To register, contact Natalie@companyofexperts.net.

Dates

May 6 to 9, 2008

June 17 to 20, 2008

Location

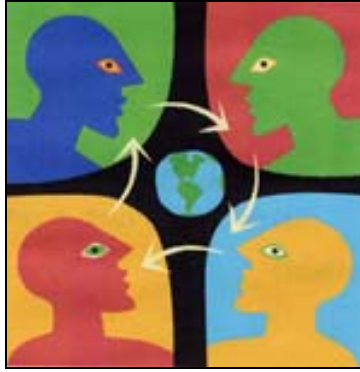
Palm Springs, CA

AB Tech College, Asheville, NC

We are planning our Fall 2008 and Spring 2009 calendar: If you would like to bring AI to your community, email Kathy@companyofexperts.net.

Newly Certified AI Facilitators

We thank each of you for allowing us to share your stories of success using AIMallika Albert mallika@dc.rr.com, AIFT, Oceanside; Kay Weiss and Rich Henry were the Trainers. Barbara Altenburger, baltenburger@mhasp.org. AIFT, Atlantic City; Nancy Stetson was the Trainer. Dwayne Dykes, ddykes@mhasp.org, AIFT, Atlantic City; Nancy Stetson was the Trainer. Nancy Goodman goodnanc@yahoo.com, AIFT, Boulder; with Trainers Charles Miller and Kay Weiss. Mikki Lynn, MikkiLynn@yahoo.com, AIFT, Oklahoma; Trainers were Charles Miller and Kay Weiss. Deidre McAdam, McadamD@flowingwells.k12.az.us, AIFT, Palm Springs - 2007; with Trainers Rich Henry and Kina Mallard. Noel Tiano, noeltiano@yahoo.com, AIFT, Reno; Jeanie Cockell was the Trainer. Wendy Hall & Maggie Stuart, AIFT Longview; with trainers Charles Miller and Kay Weiss



Mallika Albert embarked on an ambitious focus for her practicum using an inquiry to gather community support for earthquake preparedness. This has been a multiphase project over a twenty month period. **Mallika** credits Kay Weiss with helping her as she worked to build interest and buy-in with volunteers, community members and city staff. The Core Group identified “**Neighbor Helping Neighbor**” as the positive topic of inquiry.

Mallika’s Chino Canyon Neighborhood Organization/Community Emergency Response Team (CCNO/CERT) team is expanding to 14 members. They are positioning to double or triple the number of team members over the next 3 to six months. CCNO has enjoyed greater community participation as residents enroll and complete CERT Academy training. “The growing enthusiasm of residents is evidence of the power of AI to affect positive change.” The CCNO team is accomplishing more in less time. More leadership is emerging as commitment and action (vs. activity) grows.

Barbara Altenburger was a co-facilitator with Andrea Klein and Marylou Shirey. The participants have been involved in Family Court and have been through the Reasonable Efforts in Assessment, Access, and Prevention Program (**REAAP**). The REAAP Unit which was established in June, 1993, is an organized family-centered community support program encompassing individualized client assessment, case management, and uniform, consistent monitoring. The goal is to empower families by directing them to appropriate community resources to monitor their utilization of such referrals. REAAP seeks to accomplish this goal by a team approach of social work, probation and auxiliary community services; focused towards insuring the independence, self-sufficiency and growth of the family unit.

The Core Group included representatives of The Regional Council of Child and Adolescent Psychiatry (RCCAP) of Eastern Pennsylvania and Southern New Jersey, Parents Involved Network (PIN) and Family Court of Philadelphia, Pennsylvania identified the topic. *What is working well for the families who participated in the REAAP Program?* This topic is to emphasize the strengths and enhance the services provided to families.

“ I wished for the court system to understand what families needed, to respect their thoughts and to see that they were a true member of the team. I learned that through my genuine concern and compassion for families that I can help to create and drive a better understanding between the families and the juvenile justice system. This understanding will then lead to a more productive relationship between the court system and families, families will feel “heard” and respected, with the ultimate goal being their children will benefit from the collaborative efforts of the families and court systems working together. I enjoyed this experience and the atmosphere it created. It felt like being in someone’s kitchen, being among friends.”

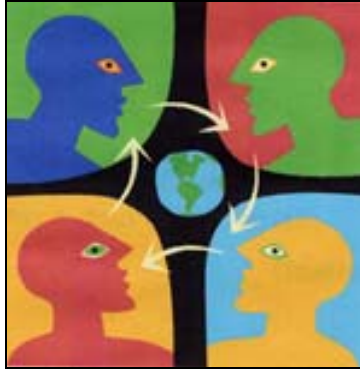
Duane is a member of the Family Empowerment Satisfaction Team (FEST) and co-facilitated a session with previously certified AI Facilitator **Andrea Klein**. Duane and her team are part of the Mental Health Association of Southeastern Pennsylvania (MHASP). They have embraced using AI to help foster change and quality improvement. Congratulations to the Mental Health Association of Southeastern Pennsylvania, which now has eight people trained in AI!

Duane co-facilitated a session with previously certified AI Facilitators **Andrea Klein** and **Sharon Johnson** for the staff of the Intercommunity Action, Inc. (INTERAC) a specialized School Based Behavioral Health Program. The MHASP has used the AI inquiry process to facilitate positive dialogue in a number of organizations

Duane wanted people to understand the importance of how they ask questions when working with families. Through the interviews people began to actually see how this process works. “Walls were broken down and they started to see each other not only as co-workers, but as individuals who shared a common goal in working with families and children with special needs.”

Because of timing issues, the team found that they had a mere 1 ½ hours for their inquiry! With this, **Duane** reports that “It was a sense of great delight to see people engaging in conversation about their work and enjoying themselves.” They were able to validate with each other their true feeling about the experiences they had when trying to get families more involved with their program. They came out of the workshop with a shared appreciation that having patience, being receptive, having compassion and being honest and non-judgmental are just a few of the skills that are so relevant to the work they have chosen to do.

Also, according to **Duane**, the staff, qualified mental health professionals, gained from engaging in conversation about their work and themselves. They were able to validate the feelings and developed a shared appreciation that for their skills and the work that they do. They have invited Dwayne, Sharon and Andrea to come back for another inquiry – hopefully, with more time.



Nancy's completed her practicum was with the Southeastern District Health Department in Pocatello, Idaho. The SDHD serves a region of counties and rural areas in Southeastern Idaho providing a multitude of health-related community services at free or sliding-scale costs, including health education, HIV/STD testing, pregnant and new mother services, and environmental health management.

The inquiry was developed in partnership with different departments who want to focus on creating more of what they do well for the future. The core group modified the generic interview guide with the positive topic "Creating and Sustaining Positive Energy Through Collaborative Working Relationships".

With more than recent 20 lay-offs due to budget issues, the director of the Health Promotions Division seized the opportunity to work with **Nancy** to focus on what they do well. With paired interviews **Nancy** followed the five generic processes. The group felt energized and made commitments including changes to their staff meeting structure to allow time for general discussion as to how people are feeling. For a fun and engaging end of the inquiry, **Nancy** says she used a bit of an "exercise", she had the members stand in a circle and throw a large ball around, taking turns saying what individual commitment, request or offer they would provide the larger group. The energy and emotion of this exercise was **Nancy's** personal best for the inquiry.

Learning more about herself was not the original intent of the inquiry, but **Nancy** did just that! The timing of the inquiry due to the loss of a division due to funding issues put a greater pressure on **Nancy**. **Nancy** reports "Everyone at the SDHD was affected by the loss, and it was interesting to do an Appreciative Inquiry during a "not a great time" for the SDHD. I was initially intimidated at the prospect, but figured that if the US Navy could do an AI two months after September 11, I could do this!"

Mikki worked with the Deaconess Hospital in Oklahoma City to complete her inquiry and practicum. The Hospital has served Oklahoma City for over 100 years and is well respected in the community. In the past five years the hospital has been sold three times which has created organizational issues. The department that **Mikki** had the opportunity to work with is the Patient Access (Admitting) which had its own challenges in addition to the larger organizational changes.

The hospital remodeled the Emergency Room and Admissions areas. During construction the Patient Access department was moved to any available space in every corner of the hospital. They were separated from each other and in some cases didn't even know where co-workers in the department were. Right before this construction project began the Manager of the Department was terminated. The new manager faced a very unmotivated, discouraged and negative staff. She had to clean house and hire a new Supervisor. There were not only very real physical divisions, but also work related and morale divisions to overcome as well.

Working with the Director of Training and Development, **Mikki** began planning this inquiry just after completing the AIFT!

Mikki reports that the core group which included members of the Patient Access Department, Human Resources as well as Training and Organizational Development began to modify the generic interview guide using the results of a departmental survey. The core group felt that the department had become fractured and defensive. The topic for the inquiry was "Teamwork and Communication" and the generic interview guide was modified.

Mikki reports "Due to the nature of the 24/7 workload we decided to do the Paired Interviews prior to the Inquiry. We thought it was very important to do face to face interviews because of the way the department had been split up due to the remodeling. The management team carefully assigned the pairs from different work groups/areas. The pairs were given time within the three days before the Inquiry to get their interviews completed. They were asked to bring their paired interviews and summary sheets to the large group meetings."

To accommodate the scheduling and demands of the department, the core group held five, different group meetings. People in a pair ended up at different meetings which lent itself to a new and engaging team dynamic.

After the five large group meetings **Mikki** had two follow-up meetings with the management team. The first meeting they compiled the Common Themes, Provocative Propositions and Bold Ideas. It was decided to post the flip chart sheets with themes, provocative propositions, and bold ideas in the admissions back room where they could all see them. The management staff also planned to have individual meetings with each participant. They decided to reframe the original survey questions and post them one at a time in the break room. Employees were encouraged to put suggestions on sticky notes. They received a tremendous amount of feedback.

The managers told **Mikki** that they were very excited and said that their department morale had dramatically changed for the positive just because of the interview process. They were very supportive of the inquiry. Their excitement and participation had a big influence on their employees. The department is working on several of the bold ideas by changing processes, building on the developed communication model. They are now in their new and improved location with skills to build on their strengths.

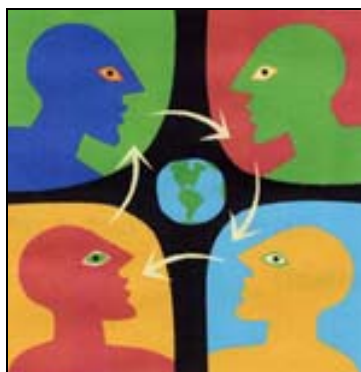
Deidre modified the interview guide for the inquiry with her core group consisting of students, faculty and administrators at Flowing Wells High School. The Core Group identified the inquiry as “Exceptional classroom learning experiences.” The interview guide and other materials were also translated into Spanish.

The group consisted of seventy high school students that are English language learners and whose primary language is Spanish, twenty high school teachers, five high school counselors, and four high school administrators. Some of the students and a few teachers were bilingual. The retreat took place on March 15, 2007. A follow-up meeting with the entire teaching staff took place in August of 2007.

Deidre’s intent for the inquiry was “to change the beliefs and the behavior of both students and teachers”. **Deidre** reports that “the process of the retreat was as powerful as the outcomes”. Teachers and students had many opportunities to experience the “other” and discover shared hopes and dreams. The energy in the room was electric as people laughed, worked, and celebrated together across languages. Students felt valued and included, teachers were amazed at the students’ insights and commitment to learning.

A poster, created by each small group expressing a dream for the future was the final product of the retreat. These statements include, “They explain to us the work we need to do.” “They take their own time to help us in our work.” “There is a lot of diversity but everyone is equal.” “The teacher explains until the student gets the concept.” “There is great communication between students and teachers.”

At the follow-up full faculty meeting in the fall, process and product outcomes from the retreat were shared with all of the teachers. Teachers individually committed to specific changes in their classroom practice and interpersonal relationships with this population of students. **Deidre** noted that this is the first year the administration has not had any complaints from English language learners about teachers not understanding their particular needs.



Noel’s practicum - a one-day retreat sponsored by the SAGE Consortium (Scholars in Aging and Ethics) was held on January 18, 2007 at the University of Nevada, Reno (UNR). Formed in 2003, the consortium focuses on ethical issues in an aging society. SAGE is composed of the Gerontology Academic Program (GAP) and the Nevada

Center for Ethics and Health Policy (NCEHP). Together, SAGE has five full time faculty, three full time staff, four contractual faculty, and two student workers.

The core group of ten (10) participants included the Director of GAP, SAGE Academic Advisor, Faculty Emeritus and Founder of NCEHP, an Assistant Professor in Bioethics, an Assistant Professor in Health Policy, a Lecturer in Public Health, the NCEHP Multicultural Education Coordinator in Las Vegas, Office Manager, Event Coordinator, and a student worker. Deborah Ballard-Reisch, a Professor at the School of Public Health, and a recent AI certified facilitator co-facilitated with **Noel** who is the Director of NCEHP.

The group agreed on the topic “Envisioning the future of SAGE” as part of their strategic planning in the context of UNR’s restructuring. Six months earlier, four of the participants underwent an inquiry conducted at the School of Public Health. Other participants had an idea of a strengths-based assessment of departments. Moreover, one week prior to the SAGE retreat, participants were asked to read Chapter 2 of Watkins and Mohr’s *Appreciative Inquiry* regarding the history, theory and research of AI. Hence, the group discussions and paired interviews naturally flowed into a more anticipatory forward looking mode. Timing was also perfect because the faculty and staff were just coming back from their winter vacation and they were eagerly awaiting another semester. Having just completed a group discussion on SAGE shared values; they easily engaged one another with their “best experience” stories.

The participants were paired off, grouped into three and took turns in interviewing one another. The subgroups dove in immediately into their exceptionally positive moments since they were familiar with another and enjoyed a relatively high level of trust. Each subgroup wrote their positive stories on flip charts and then shared them with the whole group.

Each subgroup was given a couple of minutes to discuss 3 to 5 themes that were most powerful in their stories. They then wrote down the themes on a flipchart and presented their discussions to the whole group. With colored dot-stickers, subgroups took turns in identifying 3 most meaningful themes for SAGE. This session concluded with the group agreeing on the most exciting, high energy theme.

The group identified cohesiveness, paradigmatic modeling, sincere passion, bounded creative freedom (see Sage bird mascot, Photo attached by email), finely tuned machine, outreach and service, supportive community, maximizing the human spirit, engaging the human spirit, evolution and growth, national aging and ethics institute as among the main life-giving forces.

There were three Provocative Propositions presented:

SAGE utilizes a caring spirit in its collaborations to develop solutions and implement programs to address ethical concerns of aging.

SAGE encourages us to spread our wings and soar, flock together to achieve our common vision and mission.

SAGE enables us to use our minds, differences, strengths, and spirits, and we are united in empowering ourselves and our community.

Having an affirming view of SAGE strengths and resources has provided a more positive organizational attitude. Suffice it to say, however, that the process of spreading out events throughout the year, dealing with the day to day personality differences and recruiting more students/professionals for NCEHP's academic programs continue to be challenging at times. Nevertheless, the group has worked tremendously in sponsoring the SAGE week in October. Discussions of the concept of an Institute on Aging and Ethics are ongoing across the various disciplines of UNR. The research article and a white paper for the legislature on the use of advance directives in Nevada are currently being written.

Two stories of success. The Advance Directives (e.g. Living Wills) Registry project has been a tremendous success. A local Assemblyman who was familiar with SAGE expressed a strong interest in sponsoring a bill regarding an electronic AD registry so that consumers and their providers can have access to their documents practically wherever there is internet access. Estimates of Americans having completed their ADs run between 20% to 25%. However, as much as 35% of the documents cannot be found when needed. Three of us, faculty, gave our testimonies before the Nevada Legislature in support of the bill, we wrote letters and emails, and contacted lawmakers. After an intense educational effort from our statewide coalition, the Assembly passed the bill (which was split across party lines) but the Senate unanimously approved it. On June 14, 2007, the Governor signed it into law! Hence, Nevada will join some seven other states which have either private or public AD registries.

Another highlight was the educational events SAGE co-sponsored last spring at UNR and the Reno community with close to 550 attendees. These included national experts like Rita Charon, MD (Columbia University) who presented on "Narrative Medicine" and Robert Sapolsky, PhD (Stanford University) who spoke about "Why Zebras Don't Get Ulcers." Charon engaged medical students regarding the importance of writing down their thoughts and feelings, and Sapolsky referred to his extensive research regarding the effects of stress on the body. We also sponsored a one-day hospice conference for health care workers and students in Northern Nevada.

Last June, SAGE held a follow-up one day retreat in Lake Tahoe using the S-O-A-R (Strengths, Opportunities, Aspirations, Resources) method. I facilitated the session with six participants who worked on assessing the day to day office needs as well as the year-long events. We concluded the day with reflections, learning opportunities, group affirmation and a calendar of activities. Stories will continually be gathered through newsletters, email updates, and recognition of team effort during the bi-weekly SAGE meetings. Finally, a SAGE retreat is planned at the beginning of every semester.

Noel considers setting the atmosphere for the retreat, her “personal best” She pays tribute to AIFT Trainer Jeanie Cockell for the instilling the value of group ritual and connectedness. **Noel** used the breakfast time and the gathering to provide a strong positive tone of the day. Participants met in a circle and opened with a ritual of showing a personal item that kept them centered. They then laid the item(s) down on a rug that had a Native American design intricately woven together .To facilitate respect and active listening, each “speaker” had to hold a ‘talking stick’ and wait for ones turn. An “agreement” and “parking lot” were listed on two flip charts. They closed the retreat by gathering in a circle, lighting candles and sharing their future intentions.

Wendy and **Maggie** co-facilitated an inquiry with the Information Services staff at Lower Columbia College, a mid-size college, with approximately 4,000 students per quarter and well over 400 staff. The information services staff. Responsibilities include hardware, software, network and server maintenance and web maintenance. There are eight full-time employees in the department.

The department director worked with **Wendy** and **Maggie** to identify the topic and modify the interview guide. The positive topic for the inquiry was Customer Service and face to face paired interviews were the method that they used for the inquiry.

The team developed a provocative proposition that stated: “We are a team of highly-trained technical professionals with extraordinary problem-solving skills and the ability to create positive outcomes from difficult situations. Team members support each other and promote a sense of fun in the workplace. “The team identified several ideas for how to realize their “preferred future” and indicated their personal commitment to each idea by initials on the easel pad. The ideas were then prioritized according to the number of staff expressing their commitment.

Since the inquiry, the **Wendy** and **Maggie** have met individually with several staff members who wanted to talk more about the experience, with support and coaching, team members have come to realize that focusing on the strategies/ideas where the majority of team members are committed (rather than focusing on those ideas where there was little commitment) is the best direction for them. Since the inquiry was conducted the group has started having regular staff meetings again.

Wendy’s wish for the inquiry was that the participants would be able to have a sense of accomplishment by the end of the day. In terms of a personal best experience, this session helped me internalize how powerful the Ai experience can be, even for people who are not accustomed to looking at things from a positive perspective. It also helped me see just how critical each step of the process is, no matter how great the temptation to “abbreviate” might be.

Maggie’s “personal best” with this Ai experience was the satisfaction of seeing an inquiry through to completion. . I also learned that it is okay to veer a bit from the script and let things evolve in a more organic way. In addition, I learned that even if conflicts

arise among the participants, the show can still go on, and the process can lead to a successful conclusion.

Both **Wendy** and **Maggie** felt that having adequate time dedicated to this activity and the department manager's support, led to the success of the inquiry. Because we could take our time and because the participants had adequate time to talk and think, we were able to complete the process.

Kathy

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