

Creating a Compelling Image of the Future

Practicum Submitted By:

Terry Trafton, MS, LPC, NCC
Truman Medical Center Behavioral Health
Lakewood Counseling Service
300 SE 2nd Street, Lee's Summit, MO 64063

Attended the:

Appreciative Inquiry Facilitator Training (AIFT)
February 10-13, 2010 in Las Vegas, Nevada

Appreciative Inquiry Session Summary Report:

Truman Medical Center Behavioral Health

Lakewood Counseling Service

300 SE 2nd Street, Lee's Summit, MO 64063

816-404-6170

March 11, 2010; 11:00 am – 5:00 pm

Facilitators: Terry Trafton, MS, LPC, NCC & Sharon Freese, RN, MSW

1. Brief description of the organization, group, or community you worked with.

TMC BH LCS is an outpatient Counseling Center in suburban Kansas City. They provide mental health, substance abuse, and gambling services to adults, children, adolescents and families that consist of medication, psychiatric evaluation, individual, group (Anger, Addiction Recovery, Family of Addicts), couples, family counseling. LCS staffing has a Program Director, a Clinical Supervisor, four psychiatrists, four psychiatric nurses, three psychologists, five social workers, one counselor, one clinic case manager, and four office staff.

2. List the names and/or category of stakeholders you included in the Core Group, the cross-section of people that helped you identify the topic and modify the Interview Guide.

We included a cross section of the Centers staff that included Sharon and I, the program director, Keith Spare, a Doctor, Kate Smith, a Social Worker, Sarah Effland. See **Attachment A** for the Core group planning session documentation.

3. What was the positive topic that the Core Group identified for inquiry? What method did you use to help them identify the topic?

GOALS of the Lakewood Counseling Planning Session:

- To involve staff in creating a compelling image of the future for Lakewood Counseling
- To review the achievements over the last year
- To figure out where we want to go/dream over the next year
- To identify what we do well, so we can do more of those things

The methods used to bring about these topics were an open dialogue about the counseling center and where it has been and where we would like to go in the future. We used the some of the questioning best experiences, values and wishes from the tenets of AI.

4. Attach or include the modified Interview Guide they used, i.e., the Generic Interview Guide slightly modified for the positive topic of the inquiry.

See **Attachment B** for the modified Interview Guide used for the LCS inquiry session.

5. What method of interviews did people use to inquire into exceptionally positive moments, face to face paired interviews, or some other way?

We used the traditional Ai process of paired interviews with the interview guide and summary sheet. The pairs talked about their experiences in the paired situations. Then we put people in groups of four to develop the themes from the four experiences.

6. Attach or include a list of the Life-Giving Forces (what they MOST wanted to create MORE of) that the group identified in the stories they shared?

High point themes included:

- We make a Difference
- LCS, Where your care starts before you arrive
- Teamwork – first and foremost – take care of the clients’ needs, make a client feel they can count on us, make a client feel welcomed, approach our jobs with compassion, go above and beyond what is expected, create a ‘Welcome Wagon’ to introduce our program and services
- Excellent Customer Service
- Sincere care for and belief in patients/staff
- Utilizing Relationships within the community to advocate for patients
- Client-centered care - seeing the best outcomes for client’s well-being. Examples: “being able to provide resources”, “helping patients effectively”
- Multiple perspectives - everybody is an expert at their job and lends their insight into best practice to achieve optimal outcome for client. Examples: “wanting the best outcome for the client”, “open to multiple points of view – patient, staff, business – when working to resolve a problem”
- Team approach - integration of the multiple perspectives so each role coalesces around client-centered care. Examples: “understanding multiple points of view on a deeper level to provide best service”
- Professionalism - acting with propriety and decorum promoting an atmosphere of mutual respect. Examples: “how we work as a team”, “You complete me”, “use of appropriate humor”

- Commitment - ensuring that the team works together to meet patient needs. Examples: "achieving goals", "engaging people in their future", "being insightful and competent"
- LCS Staff is the best and getting better. LCS Staff feels valued and nurtured.
- We need to sharpen our goal and organize and implement a plan.
- Goals for LCS incorporate staff development, staff wellness and staff impact on the community.
- Goals support mentoring of staff to enhance confidence, competence and professionalism.
- Electronic Medical Record is a valuable tool. LCS needs to find ways to increase staff competence and proficiency with the program. Dedicating resources to facilitate this goal.

7. Attach or include the Provocative Proposition(s) the group or organization created from the LGFs.

The Provocative Propositions included:

- We create a team-oriented environment through collaboration toward a common goal by flexibly utilizing each other's expertise and diverse perspectives.
- We will have clear, measurable standards of client success in treatment such as "symptom reduction", "enhanced functioning", "sense of wellbeing" and "satisfaction with the clinical experience at LCS" through "ease of use" rating scales that measure the change process, motivation and success with implementing change.
- We will create staff wellness and wellbeing, thereby demonstrating commitment to LCS values of client centered care and awareness that the LCS employees are the most valued resource. We will demonstrate employee value, reduce staff turnover, and enhance personal growth and professional staff development.
- We will implement staff mentoring/support to staff responsibilities.
- LCS serves as a beacon that shines in partnership within the community providing, hope, compassion, and care.

8. Attach or include the organization, group or community's Strategic Intentions and the individual Commitments, Offers, and Requests that were created to realize the Provocative Proposition(s).

Strategic Intentions & Commitments:

- "Welcome Wagon" - First contact (telephone or walk-in), Welcome letter – sent out immediately after the first appointment is set up; letter outlines services, hours, scheduling point of contact, Crisis Hotline information, appointment information; Interpretive Services, registration requirements (ID, insurance card, POA information, Flat

Fee Rate program) No show/No call policy, Logisticare and TMC Transportation arrangements

- Face to Face Meeting: One on One face meeting – registration, 30 minute appointment to review counseling services, insurance benefit review including co-pays, deductibles, Follow-up appointments, Nursing Assessment, 5 minute feedback
- Automated telephone system
- Advance Practice Nurse for primary care services
- Outreach activities for LCS: Visit Day hospital Program, Attending small business organization, Marketing to local providers and schools, Provide articles to local paper on topics regarding mental health and substance abuse, Workshops or Free CEU's, Reach out to Community Centers, Strengthen ties with competitors, Work with inpatient system with TMC more closely, Provide info about services within TMC system, Become Chamber member, Have everyone knowledgeable of the services available here.
- Clinical Action Team: members - Bonnie, Cole, Jane, Amelia, Patty, Sarah, Kate, Keith, Terry, meets the first and third Thursdays of every month from 12pm to 1pm.
- Clinical Case Reviews – All LCS staff, meets the second and fourth Thursdays of every month from 12pm to 1pm. Each clinician presents a minimum of once a year. Non-clinical staff will attend reviews four times a year. Clinical staff to attend reviews eight times a year. Bring your own lunch. Be on time – meets in large meeting room.

9. Impact or Results: What organizational, group or community attitude, process or structure changes have people already made as they move toward realizing the Provocative Proposition(s)? What progress have people made toward their Strategic Intentions or Initiatives or Pilot Projects? What stories of success can you share?

- The LCS staff immediately started meeting for CAT and CCR meetings as set up and continue to do so regularly. It has been a very empowering process for them to realize process improvements in the workflow of the program that enhances the quality and quantity of care being provided.
- The intake staff has begun to implement the welcome process for clients as they move into services at LCS and have incorporated a better face-to-face process for paperwork completion necessary for services to start.
- LCS now has an APRN on site two days a week providing primary care services.
- LCS installed an automated phone system to help direct call volume at the front desk and added additional staff due to volume of clients.

- LCS has and continues to do many of the outreach activities. Most recently the joined the Chamber and had an open house ribbon cutting with several community members present.

10. What will you do to ensure that people continue to move toward realizing the Provocative Proposition(s)? How will you help them gather stories of success? How will you help them celebrate? How will you, as the AI Facilitator, support their ongoing success?

I have attended staff meetings on a minimum of monthly as well as there new planning and clinical quality meetings, CAT and CCR, to show support and assist with framing questions in a positive, generative process. Recently, August 5, 2010, at the request and discussion of the staff we planned a Ai follow-up session with lunch purchased by the organization to celebrate the successful implementation of many of the intentions identified and then identified several new intentions for the next several months that people are committed to help pilot.

Follow-up Interview Guide:

1. What are your impressions, experiences of what has been working well over the last 5 months?
2. What positive changes have you experienced at LCS?
3. How are things different, better?
4. What would you like to see happen over the next several months?

11. What did you wish for in the inquiry? What did you learn from the inquiry about yourself and your facilitation? What was your "personal best" experience related to facilitating the Inquiry?

My hope for my first inquiry was to be able to get through it, represent the Ai process correctly, and get everyone's participation and buy-in for this process. The biggest thing I took away from the Inquiry was just how energizing and fun the process can really be in a large group (24). The Ai process melted away any resistance and everyone embraced it wholly. My personal best experience in facilitating the Inquiry was to see how many people were energized including myself to action and have so many positive things to say after the inquiry, "This was the best, most productive planning session I have ever been a part of and it was FUN!" and then seeing the staff follow through with commitments.

12. Have you received permission from the "client" or "clients" to tell us their story? In other words, does Company of Experts.net have permission to share this story with others?

Yes.

Attachment A

Truman Medical Center Behavioral Health
Lakewood Counseling Service
Planning Session: March 11, 2010
Core Group Meeting

GOALS of the LCS Planning Session:

- To involve staff in creating a compelling image of the future for Lakewood Counseling
- To review the achievements over the last year
- To figure out where we want to go/dream over the next year
- To identify what we do well, so we can do more of those things

Core Group GOALS:

1. Core group members understand the overall purpose and desired outcomes of the process; i.e. why are we doing this and what success will look like:

- What do we want to achieve in the longer term with this process
- Within that context - what we hope to achieve at the upcoming session

2. To experience, understand and feel comfortable with the approach for creating the outcomes identified above:

- Introduce Appreciative Inquiry
- Appreciative Inquiry principles and practices

3. To agree upon the ongoing role of core group members

- To help people understand the process

4. To develop a customized interview guide & summary

5. To establish together a plan for what else needs to be done

Core Group Agenda:

- Overall purpose of this process
- Goals & Agenda for this session
- What is AI: Overview of theory, research, & principles, The Five D model

Interview Guide

Best Experience:

Tell me about your best experience that you had at Lakewood Counseling? A time when you felt most enthusiastic, involved, engaged, and excited about providing care. What made it such a positive or best experience for you? What was your contribution to this experience? Who else was involved and what was their contribution?

Attachment A

Values:

Without being humble what are the things you value deeply about yourself, a clinician/staff member, and Lakewood Counseling?

- a. Yourself: As a person what do you value most?
- b. Yourself at work: When you are feeling best about yourself as a clinician/staff member, what personal strength, trait or attribute is present?
- b. Lakewood Counseling: What do you value about Lakewood Counseling? What is about Lakewood Counseling that brings out the best in you?

Core Value:

What do you think gives energy to Lakewood Counseling? What is the core value of Lakewood Counseling? How do you experience this core value at Lakewood Counseling?

Three Wishes:

If you had three wishes for Lakewood Counseling, which if granted, would make it an even better place to work, what would they be?

Summary of Interview Questions

From the interviews, identify key themes/topics

What was the best quote?

What was the best story?

What idea/story/value resonated most for you as the listener?

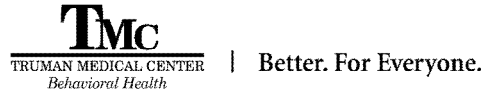
Did a particular innovative way of doing things emerge from the interview?

What 3 themes stood out most during the interview?

Logistics:

- 4 flip charts
- 18 people with 2 facilitators
- 4 groups 2 – 4 people, 2 – 5 people
- True Colors sent to everyone
- Summary of last years goals/achievements/things to do to everyone
- Get Thai/Pizza orders

Attachment B



Lakewood Counseling Service March 11, 2010 Planning Session

GOALS of the Lakewood Counseling Planning Session:

- To involve staff in creating a compelling image of the future for Lakewood Counseling
- To review the achievements over the last year
- To figure out where we want to go/dream over the next year
- To identify what we do well, so we can do more of those things

Interview Guide

Best Experience:

Tell me about your best experience that you have had at Lakewood Counseling? A time when you felt most enthusiastic, involved, engaged, and excited about providing care. What made it such a positive or best experience for you? What was your contribution to this experience? Who else was involved and what was their contribution?

Values:

Without being humble what are the things you value deeply about yourself, a clinician/staff member, and Lakewood Counseling?

- a. Yourself: As a person what do you value most?
- b. Yourself at work: When you are feeling best about yourself as a clinician/staff member, what personal strength, trait or attribute is present?
- c. Lakewood Counseling: What do you value about Lakewood Counseling? What is about Lakewood Counseling that brings out the best in you?

Core Value:

What do you think gives energy to Lakewood Counseling? What is the core value of Lakewood Counseling? How do you experience this core value at Lakewood Counseling?

Three Visions:

If you had three things for Lakewood Counseling, which if granted, would make it an even better place to work, what would they be?

Attachment B

Summary of Interview Questions

From the interviews, identify key themes/topics

What was the best quote that came out of your interview?

What was the best story that came out of your interview?

What idea/story/value resonated most for you as the listener?

Did a particular innovative way of doing things emerge from the interview?

What 3 themes stood out most during the interview?