Appendices

Working Together to Put Living First

**A Guidebook to Change the Culture
of Aging in Long-Term Care**

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Appendix 1

Action 1.2: Additional Resource

Additional Reading and Resources about Changing the Culture of Aging

Eden Alternative

The Eden Alternative® is an international, non-profit organization dedicated to creating quality of life for older adults and their care partners, wherever they may live. To learn more about the Eden Alternative, check out their website: *www.edenalt.org*

GREEN HOUSE® Project

THE GREEN HOUSE® Project offers a model for LTC designed to look and feel like a real home. Over the last decade GREEN HOUSE® homes have set a new standard for quality care and quality of life with a model that is both proven and practical. To learn more about the GREEN HOUSE® Project, check out their website: *www.thegreenhouseproject.org*

Partnerships in Dementia Care Alliance

The Partnerships in Dementia Care (PiDC) Alliance is focused on enhancing dementia care by changing the culture within long-term and community care to better reflect a relationship-centered, partnership approach to care and services. To learn more about the PiDC Alliance, check out their website: *www.uwaterloo.ca/partnerships-in-dementia-care*

Pioneer Network

To learn more about the Pioneer Network, a not-for-profit organization based in the United States that advocates for and facilitates culture change through information, resources, advocacy, an annual conference and more, check out their website: *www.pioneernetwork.net*

Walk With Me

In March 2014, the RIA welcomed over 400 delegates to the inaugural Canadian culture change conference, including older adults and residents, formal and informal caregivers, professionals, educators, policy-makers, and researchers. For keynote videos, presentation slides and more information about this event, check out the website: *www.the-ria.ca/walkwithme*

Research articles and reports

Here are a few select and seminal articles that have inspired the culture change movement, described its evolution, and/or reported on the research underpinning culture change.

Barkan, B. (2003). The Live Oak Regenerative Community: Championing a culture of hope and meaning. In A. Weiner and J. Ronch (Eds.), Culture change in long term care (pp. 197-221). New York: The Haworth Press.

This article describes the values, processes, and roles that enable the Live Oak Regenerative Community model to impact the lives of elders and transform institutions.

Caspar, O'Rourke & Gutman (2009). The differential influence of culture change models on long-term care staff empowerment and provision of individualized care. Canadian Journal on Aging/La Revue canadienne du vieillissement, 28(02), 165-175.

This study was conducted to determine if differences exist across culture change models in relation to formal caregivers' perceptions of empowerment and reported provision of individualized care. The researchers recruited staff working in LTC communities that had implemented the Eden Alternative, GentleCare, facility-specific social models of care or no culture change model. Findings suggest that the greatest benefits existed for those in communities with a facility-specific social model of care.

Dupuis, S.L., McAiney, C., Fortune, D., Ploeg, J., & deWitt, L. (2014). Theoretical foundations guiding culture change: The work of the Partnerships in Dementia Care Alliance. Dementia: The International Journal of Social Research and Practice, 1471301213518935.

This article describes a culture change initiative currently underway in Canada, the Partnerships in Dementia Care Alliance, and the theoretical foundations informing this work, including: Alzheimer Disease and Related Dementias framework, the authentic partnership approach, participatory action research, and Appreciative Inquiry.

Fagan, R.M. (2003). Pioneer Network: Changing the culture of aging in America. In A.S. Weiner & J.L. Ronch (Eds.), Culture change in long-term care. (pp. 125-140). New York: The Haworth Press.

This article describes the origins of the Pioneer Network, the need for culture change, and principles and values underpinning the culture change movement.

White-Chu, E.F., Graves, W.J., Godfrey, S.M., Bonner, A., & Sloane, P. (2009). Beyond the medical model: The culture change revolution in long-term care. Journal of the American Medical Directors Association, 10, 370-378.

This review article gives an overview of the key elements of culture change, including workforce redesign, resident-centred care, leadership, implementation processes, and evaluation.

Guides and edited books

Barkan, B. (2002). The way of the champion: A personal journey (a Live Oak learner's journal). Rochester, NY: The Pioneer Network Live Oak Group.

Based on the Live Oak Regenerative Community approach, this interactive learner's journey guides learners through their own personal and unique journey to become a champion of cultural renewal and transformation. Each section of the learner's journal is composed of 5 parts: narrative, lore, integration, practice, and free journaling.

Pioneer Network (1994). Getting started: A pioneering approach to culture change in long-term care organizations. Rochester, NY: Pioneer Network with the Paraprofessional Health Institute.

The Pioneer Network partnered with the Paraprofessional Healthcare Institute to produce this powerful tool for organizations that are beginning the process of de-institutionalizing services and individualizing care. It is a resource filled with exercises and tools for individuals at all levels of an organization.

Ronch, J.L., & Weiner, A.S. (Eds). (2013). Culture change in elder care. Baltimore, MD: Health Professions Press.

This edited book explores the ongoing efforts to revolutionize elder care in America, with contributions from many of the innovators who have championed the culture change movement. It is the most up-to-date resource on the transformative changes occurring in elder care services and proves that new approaches have become more than theory and are a practical reality.

Ronch, J.L., & Weiner, A.S. (Eds). (2013). Models and pathways for person-centered elder care. Baltimore, MD: Health Professions Press.

Contributors to this edited book describe how they worked within their organizations to bring dignity, choice, respect, and comfort back into the day-to-day lives of elders. This resource, from many of the pioneers of the culture change movement, provides the wisdom and tools needed to turn any care community into a more supportive, person-directed environment.

Weiner, A.S., & Ronch, J.L. (2003). Culture change in long-term care. Binghamton, NY: The Hawthorn Press.

This edited book shares theoretical and practical applications of culture change within LTC settings. It examines existing models of 'positive cultures', emphasizing philosophy, and implementation.

Appendix 2

Action 1.3: Worksheet

Identifying, Appreciating, and Growing Our Roots

This worksheet is designed to help you and your learning partners consider the key attributes of your organizational culture that would make a 'culture change' journey possible, effective, and sustainable.

Please discuss the following questions:

1. What key attributes (i.e., values, strengths) of your organizational culture make it possible to embark on a culture change journey?

   Please consider the list of possible key attributes on page 11 of this worksheet. Many key attributes may exist. Record your responses below.

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2. If you consider the key attributes listed above as the 'roots' of your culture change process, how deep is each root today?

   Please draw and label each attribute as a root onto the tree image on the next page.
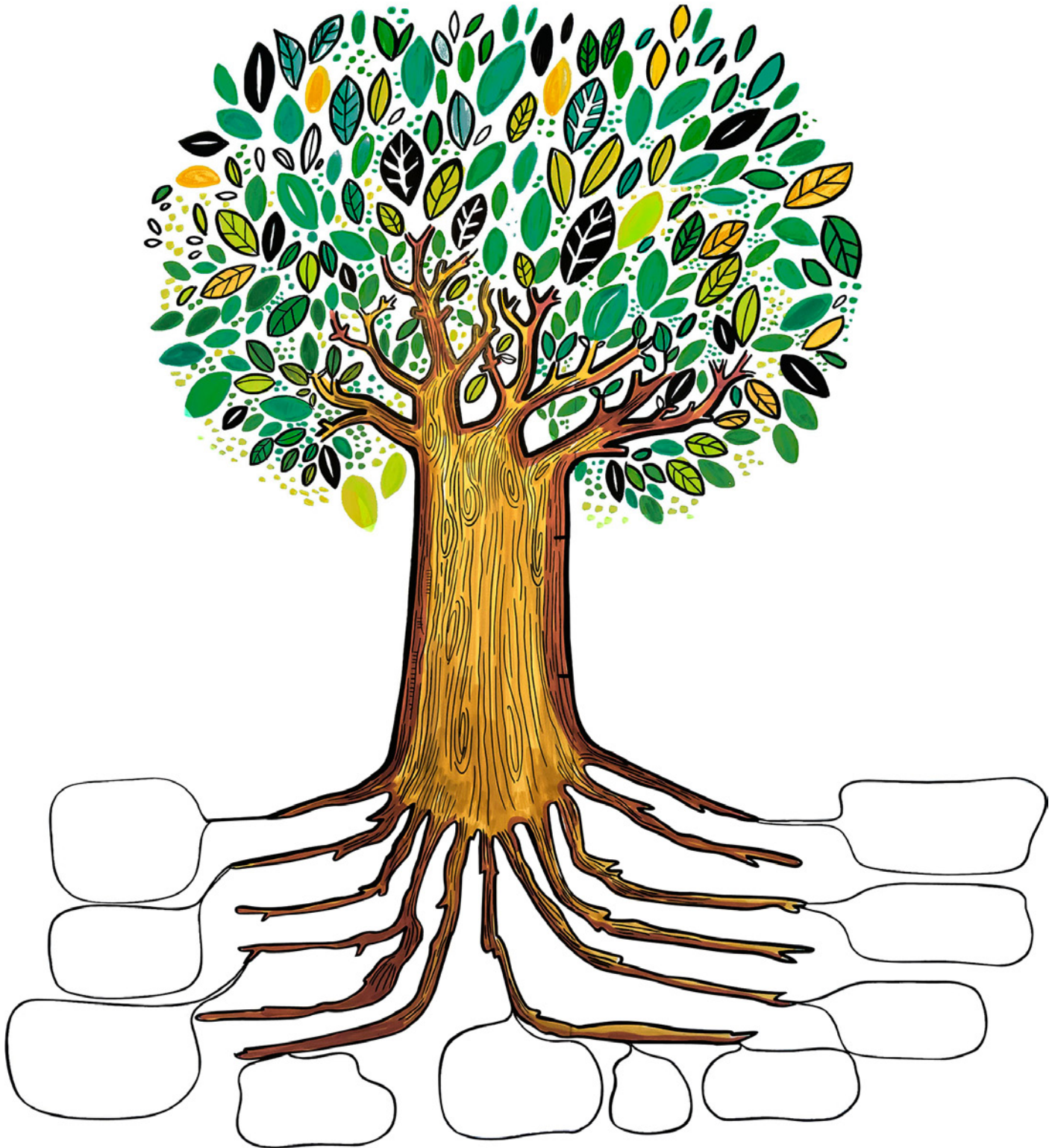
The Roots

Remember: The longer and deeper the root, the stronger its presence in your organization. The shorter and more shallow the root, the weaker its presence, though still an important enabler of your culture change journey.

3. After drawing and labeling your roots, please circle any that need to grow a bit more before you can embark on your culture change journey. Then, discuss a plan for how those roots can be strengthened and record your ideas in the space provided.

Root to be strengthened	Plan for strengthening this root

Possible key aspects of organizational culture that can support your culture change journey

Mission-, vision- and values-driven
The extent to which organizational practices and decisions at all levels align with the organization's mission, vision, and values

Resident-centred (or resident-directed)
The extent to which organizational practices enhance the ability of each resident to live freely and fully, as desired

Strong and trusting relationships
The extent to which healthy, mutual relationships exist in the current climate (between individuals and community groups)

Community member involvement in decision making
The extent to which opportunities exist for residents, family members, and team members to interact, build relationships and participate in decision making

Senior leaders aligned with culture change values
The extent to which the organization's owners and senior leaders are aligned with and foster culture change values

Servant/serving leadership
The extent to which leadership team members embody a participatory style, demonstrate transformative leadership, work collaboratively, and develop the leader in others

Organizational capacity for learning, research and innovation
The extent to which learning, research and innovation are well-supported priorities within the community and organization

Strengths-based leadership
The extent to which a leader uses his or her unique strengths to enhance team trust, stability, compassion, and hope

Collaborative leadership
The extent to which a leader helps to ensure the success of a team to accomplish a shared purpose; the extent to which a leader shares control and trusts his or her partners to deliver on a goal or task, even though the partners may operate differently than him or her

Appendix 3

Action 1.4: Worksheet

Getting Ready for Culture Change

Now it is your turn to reflect on your organization's readiness for change. With your learning partners, please look back at how you proposed to strengthen your roots (Appendix 2) and use this worksheet to develop goals and describe actions required for your organization to 'get ready' for a culture change journey. Please make copies of this worksheet and use 1 worksheet for each goal.

1: Identifying the goal		
What is your goal?	**What would success in achieving the goal look like?**	**Why is this a valuable goal?**

2: Setting the stage		
What has already been done or is currently being done to address the problem or achieve the goal?	What additional information is needed to achieve the goal?	What resources are needed to achieve the goal?

3: Developing the plan						
What must be done to achieve the goal?	What is your timeline for implement-ing each action?	Who is responsible for carrying out this action?	Who else needs to be involved in carrying out this action, and what is their role?		What obstacles might we encounter as we strive to achieve this goal, and how can we overcome them?	
			Person	Role	Obstacle	Strategy
Action 1						
Action 2						
Action 3						
Action 4						
Action 5						

Appendix 4

Action 1.5: Worksheet

The Role of Collaboration and Authentic Participation in Culture Change

The most effective, empowering and sustainable culture change initiatives develop from collaborative processes that include all community groups (e.g., residents, family members, team members, volunteers, senior leaders/owners, community partners, etc.), and to the extent possible, all community members in decision making. This worksheet will help you and your learning partners explore and discuss the role of collaboration and authentic participation in culture change.

Discussion 1

Do you agree or disagree with the following statement, and why?

"When leaders in long-term care implement change without true collaboration, there is no culture change"

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Discussion 2

With your learning partners, think about a time in which you participated (at some level) in an organizational change or improvement.

1. Describe the situation. What was intended to change or improve?

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2. Think about the design, implementation, and evaluation of the change or improvement. What leadership approach was used to guide decision making at each stage (e.g., top-down, collaborative, etc.)? How did that make you feel?

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3. What was the outcome of the intended change or improvement?

_____

_____

_____

4. What was the participation level of the following community groups in the design, implementation, and evaluation of the change or improvement: residents, family members, direct support team members, leadership team members, senior leaders/owners, others?

	Participation Level				
	None	Low	Medium	High	N/A
Residents					
Family members					
Direct support team members					
Leadership team members					
Senior leaders/ owners					
Other:					
Other:					
Other:					

5. What did you learn through your reflections about collaboration in your organization?

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6. How could you have engaged all community members more fully in your example, and how might this have changed the outcome(s)?

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Appendix 5

Action 2.1: Facilitator guide

Facilitator Guide for an Awareness-Raising Event

The process guide below features what worked well for Schlegel Villages. It is meant as a guide for you to tailor to best suit your culture change journey.

Item and Time	Process
Warm-Up: Reflecting on the Culture of Aging (20 minutes)	Play a short video that depicts the institutional look and feel of most long-term care (LTC) homes today. **Recommendation:** I Wanna Be Sedated (Young @ Heart/the Ramones). *http://www.dailymotion.com/video/xqrb81_young-heart-clip-i-wanna-be-sedated_shortfilms* **Discuss:** • Why do the members of Young @ Heart want to be sedated? • How is the culture of aging portrayed in their rock video? • How is LTC depicted in this video?
Mini-presentation (20 minutes)	**Draw on your own experiences with examples to present the following main points:** **What does it mean to 'Change the Culture of Aging'?** (from Fagan, 2003) • Transformation of individual and societal attitudes toward aging and older adults. • Transformation in the attitudes of older adults toward themselves and their aging. • Changes in the attitudes and behaviour of caregivers toward those for whom they care. • Changes in governmental policy and regulation. • Deep systems changes across the continuum of aging services as we transition from institutional models into social models. **What does it mean to 'Put Living First'?** • Provide excellent health care without making health care the central focus. • Provide care that is more directed by residents' preferences and needs, placing a high value on human interaction and meaningful engagement in order to improve resident satisfaction and quality of life. • Honour residents' deep, healthy desire to retain control over their lives. • Residents are primary participants in developing their individualized care plans; supported to choose their own daily routines and services.

Item and Time	Process
Personal reflection (10 minutes)	Ask participants to think of a time in their own practice when they 'put living first'. Ask them to reflect quietly for a few moments on the following questions and to write down their reflections: • How did it make you feel to put living first? • How do you think it made the resident(s) feel? After a few moments of quiet reflection, invite a few participants to share their reflections with the group.
Mini-presentation (20 minutes)	Describe the 9 domains as originally described by Rose Marie Fagan (2003). Draw on personal examples to illustrate the continuum within each domain from institutional to social, and give examples of behaviours/attitudes/structures/practices that reflect an institutional model of care, and that reflect a more social model of living. **Evolution from an Institutional Model to a Social Model**

Institutional Model	Social Model
Staff provide traditional care, treatments and interventions	Staff and residents work together to 'put living first'
Residents follow facility and staff routine	Staff follow residents' routines
Staff rotate work assignments	Staff consistently assist same residents
Staff make decisions for residents	Residents are supported to make their own decisions
The physical environment is the staff's workplace	The physical environment is the residents' home
Activities are structured	Activities are planned but also flexible, spontaneous and offered around the clock
Hierarchical department focus	Collaborative team focus
Staff care for residents	Staff, residents and families enjoy mutual relationships
'Us and them' feel	Community feel

Item and Time	Process
World Café Exercise #1 (60 minutes)	The purpose of this *World Café* is to discuss meaningful question(s) in small groups. See Appendix 6 for instructions on how to conduct a *World Café* process. Round 1 includes 2 discussions, called 'first table' and 'second table' below. • **First table:** Using the Collaborative Organizational Assessment handout on page 23, as a group, locate where we (as an organization) lie on each continuum of the collaborative organizational assessment. Each table should agree on a single score per domain (i.e. 9 scores), each from 1 to 10, with 1 meaning 'very institutional' and 10 meaning 'very social'. Instruct table hosts to try hard to gain consensus for each rating. • **Second table:** As a group, identify a common area of greatest strength and a common area of greatest need drawing on your discussions from the first table.
Reflection (30 minutes)	Facilitate a large group discussion. • Invite comments on the process for arriving at the ratings. • Ask each table host to total the ratings from their table for the 9 domains and divide by 9 for an average overall score. If agreement was not reached for all domains, use the scores available to arrive at an average overall score. Collect those scores and divide by the number of tables for an average overall score for your organization. • Invite comments from the group on what this score means. Was it higher or lower than expected? Is a score of 10 a reasonable goal? Why or why not? • Reinforce for the group that the purpose of this collaborative assessment is not to objectively quantify your organization's culture, but to engage in critical reflection and dialogue. • Optional: If the group is feeling deflated over low scores, draw attention to some of their higher scores, too. Consider playing a short video such as the Pioneer Network introductory video that offers an inspiring view of what is possible when people and organizations embrace culture change.
Discussion – That's Not My Job (10 minutes)	There are nearly 18,000 long-term care homes in North America. The overwhelming majority are structured in exactly the same way: top-down direction, task-oriented practices and an institutional atmosphere. We can easily recite the departments and positions in any nursing home in any town in any province. Invite reflection and comments on the following question: Why do you think this is the case and can it be otherwise? Summarize the discussion. Ask the group to reflect on the following question: Have you ever said 'that's not my job' or heard someone say those words to you? If so, what was the situation and how did it make you feel. Invite comments, then summarize the discussion.

Item and Time	Process
World Café Exercise #2 (40 minutes)	Using the *World Café* format (instructions in Appendix 6), discuss existing practices that 'disturb us' (or residents), and what is needed to move towards a social model of living. Do this twice, with everyone but the table hosts moving to a second table. Use the 'Things that Disturb Us' handout on page 24.
Discussion – Transformative Ideas (20 minutes)	Invite tables to share their *World Café* discussion points with the large group. Collect the completed handouts for follow up discussions and to create a record of your journey. Turn the conversation to transformative ideas. Brainstorm things that can be done to move towards a more social model of living. Here are some that might come up, or that you could suggest: • Shift team member's focus from task to relationships. • Work together to discover and support the residents' leisure preferences. Everyone takes part in the provision of meaningful activities. • Move decision-making as close to the resident as possible, if not with the resident him- or herself. • Decentralize dining so that meals are prepared on a flexible basis close to where each resident dines. Residents and families may have access to the kitchen and even participate in cooking activities. • Establish self-scheduling work teams that consistently assist the same residents. • Cross-train team members to work in more blended roles ('versatile staff'). • Flatten the organizational structure and empower direct support team members and residents. • Use a collaborative decision-making process (e.g., 'neighbourhood meetings' or *Learning Circles*) to plan menus, activities and daily routines.
Discussion – Physical Space Transformation (20 minutes)	Lead a discussion about the meanings people attach to 'home' and 'community', and introduce some transformative ideas for shaping physical environments to create home. • Consider the meanings people attach to 'home' and 'community'. • Provide opportunities for personalization, comfort, social interaction, ritual and self-directed activities, privacy, control and contribution. • Recognize the importance of nature and provide 'outdoor extensions' (visual and physical access to the outdoors). • Minimize institutional presence and structures that create an 'us and them' dynamic. • Value the uniqueness of your community and encourage its expression in the physical environment (i.e., display community members' artistic creations and/or collections). • Provide opportunities for residents and families to care for the community as desired. • Remember, people 'read' the environment for cues as to how they should act, what they should do, and how they can expect to be treated. • Language affects thinking; what we call a room or place shapes its use.

Item and Time	Process
World Café **Exercise #3** (40 minutes)	Using the *World Café* format (instructions in Appendix 6) discuss aspects of the physical environment in your organization that contribute to an 'us and them' feel, and identify potential modifications that would create a better sense of home. Do this twice, with everyone but the table hosts moving to a second table. Use the 'Workplace or Home' handout on page 24. Ask table hosts to report back the most common responses or strongest themes from their tables.
Learning Circles **"Where do we go from here?"** (60 minutes)	Introduce the last portion of the day, which explores how collaboration is the path to REAL change: • Developing a new social model of care cannot be a top-down approach. It must develop from the ground-up. • Effective and lasting change is much more likely when it is understood and supported across the organization. • Collaboration minimizes resistance. • Avoid the charismatic leader and build coalitions instead. • True collaboration is difficult and takes time, but without it, there is no REAL change. This time, use a *Learning Circle* format. Follow the *Learning Circle* instructions in Appendix 7. **Questions:** • Round 1: What opportunities currently exist for residents to participate in decision making, and how effective are they? • Round 2: What more can we do to include residents in decision making? - i.e., improve existing opportunities, create new opportunities
Discussion and Closing (10 minutes)	Ask *Learning Circle* facilitators to share some of the ideas expressed in their circles. Thank participants for their contributions throughout the day. Through a large group discussion, summarize some of your collective discoveries in terms of 'strengths' and 'opportunity areas for growth'. Consider a democratic way of gauging who believes the organization should begin a collaborative journey to change the culture of aging (e.g., vote, raise hands, stand, etc.).

Collaborative Organizational Assessment Handout

Institutional model of care	<------------------------------>	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 for residents	1 2 3 4 5 6 7 8 9 10	Decisions with 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 and spontaneous activities
Hierarchical departments	1 2 3 4 5 6 7 8 9 10	Collaborative teams
Staff care for 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
OVERALL AVERAGE: (total score/9)		
What is your organizations area of greatest strength?		
What is your organization'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.

'Things that Disturb Us' Handout

Things that disturb us (and residents)	...and what is needed to move towards a social model of living
Example: Getting residents up 2 hours before breakfast, and then they sleep through it!	Example: Decentralize breakfast preparation to be closer to where each resident lives and prepare/serve food in a more flexible way

'Workplace or Home' Handout

Identify features or aspects of the physical environment that reinforce the prominence of the staff's workplace and contribute to an 'us and them' feel	Identify potential modifications to this feature or aspect in order to provide a better sense of 'home' for residents and promote a community feel

Appendix 6

Action 2.3: Additional resource

World Café

Content in this section has been adapted from the World Café website (www.theworldcafe.com)

A *World Café* is a quick-moving, fun, and effective format for hosting meaningful dialogue in small groups. The general format of this *World Café* involves 2 rounds of conversation. The first round of conversation lasts 15 minutes, and the second round of conversation lasts 10 minutes. Following these conversations, participants engage in a 5-minute large-group discussion.

Guiding principles

The guiding principles of a *World Café*:
- set the context;
- create a hospitable space;
- explore questions that matter;
- encourage everyone's contribution;
- connect diverse perspectives;
- listen together for patterns and insights; and
- share collective discoveries.

How to structure a World Café

Round 1: During discussion, table 'hosts' (previously recruited because of their facilitation skills and briefed by the session organizers about the process) and 'guests' are encouraged to write, doodle and draw key ideas on the handouts provided. Table hosts are responsible for noting key ideas on flipchart paper.

Upon completing the first round of conversation, the table host remains at the table while everyone else serves as travelers or 'ambassadors of meaning', carrying key ideas, themes and questions into their new conversations at a second table.

Example: Schlegel Villages' Collaborative Organizational Assessment (Action 2.3) Each table ranks the organization along each continuum using the Collaborative Organizational Assessment. 'Hosts' record key points.

Round 2: The table host welcomes new guests and briefly shares the main ideas, themes, and questions of the first conversation. Guests are then encouraged to link and connect ideas coming from their previous table conversations – listening carefully and building on each other's contributions.

By providing opportunities for people to participate in 2 rounds of conversation, ideas, questions, and themes begin to link and connect. At the end of the second round, all tables will be cross-pollinated with insights from prior conversations.

Example: Schlegel Villages' Collaborative Organizational Assessment (Action 2.3) After 'guests' move to a new table, everyone shares their learnings from their previous table and compare rankings.

Round 3: After the second round of conversation, table hosts and new guests will remain at the second table and engage in a large group conversation, during which they are invited to share their discoveries and insights.

Through this type of conversational process, patterns can be identified, collective knowledge grows, and possibilities for action emerge.

Example: Schlegel Villages' Collaborative Organizational Assessment (Action 2.3) Group discussion about the experience of the *World Café* conversations and the key findings.

Appendix 7

Action 2.3: Additional resource

Learning Circles

This type of group process may be used to collaboratively address a wide variety of topics. The process helps everyone grow in self-awareness, group cohesion, and critical thinking.

What is it?

While many guidelines for *Learning Circles* exist, we used the description and instructions put forward by Shields and Norton (2006):

> *Not only is a circle the most conducive form for stimulating conversation within a group, but it is also a form within which no point has greater value than another; no person's voice holds greater value than another. Everyone is heard as equals, which builds a sense of respect and team. 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. (p. 94-95)*

How to do it:

- 8-15 participants sit in a circle (ideally, without tables or other obstructions blocking their view of one another).
- One person is chosen as the facilitator to pose questions to members of the circle, give encouragement, and keep responses moving along.
- One person is chosen as the note-taker to jot down suggestions, ideas, questions, and action plans that emerge from the discussion.
- 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 the floor opens for general discussion.

Appendix 8

Action 3.2: Worksheet

Identify and Invite Diverse Members to Serve on an Advisory Team

With your learning partners, discuss the following questions to help you think through who to invite to serve on an advisory team, how best to recruit potential members, and how the team should be structured and operate to best support your culture change journey.

1. How will you identify and recruit potential advisory team members?

2. Does your recruitment strategy take the following elements into consideration?
   - Diversity of perspectives
   - Balance of community groups
   - Supports required to ensure full participation during meetings (e.g., funding is in place to support travel to meetings or teleconference capabilities; adequate coverage or backfill is provided during meetings so members can participate without being pulled away; meeting materials are accessible to a wide range of community members; etc.)

3. What type of information will your recruits need in order to make an informed decision about whether or not to participate?

4. What type of commitment will be required to serve on the advisory team?

5. How often will you meet?

_____

6. When will you meet?

_____

7. What time will you meet?

_____

8. Where will you meet? Is the planned environment comfortable and accessible?

_____

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9. How will you select a chair or co-chairs for the advisory team?

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10. What other assigned roles or duties would help support an effective advisory team meeting and process?

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Appendix 9

Action 3.3: Facilitator guide

Facilitator Guide for Advisory Team Information Meeting

The facilitator guide below features what worked well for Schlegel Villages. It is meant as a guide for you to tailor to best suit your culture change journey.

Item and Time	Process
Welcome and introductions (10 minutes)	• Welcome participants. • Ask each person to introduce themselves and highlight 1 thing that drew them to your organization.
Introduction to culture change (30 minutes)	• Introduce participants to the culture change movement. Start by providing a definition, and comparing and contrasting 'social models of living' with 'institutional models of care'. Use the definition and table below as a guide. **What is the culture change movement?** Today, there is a growing consensus that deep systems changes are desperately needed across the continuum of aging services, but more specifically within LTC homes, as we progress from institutional models of care to social models of living (see below). This is known as the 'culture change' movement. An overwhelming majority of organizations providing care and services to older adults reflect an institutional (or medical) model of care that often diminishes the quality of life of the people who live and work in these settings. While many have experimented with change, very few have truly transformed. **Long-Term Care Models** (adapted from Fagan, 2003)

Focus on care treatments and interventions	Focus on 'living' and provide excellent care
Residents follow facility and staff routine	Staff follow residents' routines
Staff rotate work assignments	Staff consistently assist same residents
Staff make decisions for residents	Residents are supported to make their own decisions
Physical environment is the staff's workplace	Physical environment is the residents' home
Activities are structured	Activities are flexible and spontaneous
Hierarchical department focus	Collaborative team focus
Unidirectional relationships; 'us and them'	Mutual relationships; community feel

Item and Time	Process

Introduction to culture change (30 minutes)
 	
 Cont'd
	• After the group has an understanding of culture change, discuss the differences between adopting a branded model and a community-developed model (i.e., collaboratively developed by members of your organization). The following elements should be considered when discussing which approach to take:
	   – Cost considerations
	   – Requirements of the physical environment
	   – Prescriptive approach vs. collaborative and organic approach
	   – Differences in outcomes (Caspar, O'Rouke, & Gutman, 2009)
	      • Community-specific social models of care were superior in terms of staff empowerment and perceptions of individualized care
	   – Adopting the current 'ideal' (which may not be the ideal 5 to 10 years from now) vs. developing something 'even better' through a dynamic, social process that fosters continuous evolution
	   – Collaboration is the path to real change
	   – Effective and lasting change is much more likely when it is understood and supported across the organization
	   – Collaboration minimizes resistance
	   – Avoid the charismatic leader and build teams instead
	   – True collaboration is difficult and takes time, but without it, there is no REAL change
	   – Finally, end this section with a group discussion by asking participants: "Do we really want to change our culture?"

Introduction to Appreciative Inquiry (AI) (20 minutes)	• Introduce participants to Appreciative Inquiry (AI). Start by providing a definition, and then discuss with the group their level of agreement with each of the AI assumptions. Use the definition and list of AI assumptions below as a guide. **What is AI?** "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).

Item and Time	Process
Introduction to Appreciative Inquiry (AI) (20 minutes) *Cont'd*	**How much do you agree with the following assumptions of AI?** 1. In every society, organization, or group, something works. 2. What we focus on becomes our reality. 3. Reality is created in the moment, and there are multiple realities. 4. The act of asking questions of an organization or group influences the group in some way. 5. People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known). 6. If we carry parts of the past forward, they should be what is best about the past. 7. It is important to value differences. 8. The language we use creates our reality. • **Optional:** If you would like to provide participants with examples of AI success stories, please visit the AI Commons at www.appreciativeinquiry.case.edu. You may also wish to share Schlegel Villages' success stories. Video clips are available, please contact the RIA at info@the-ria.ca. • Next, use the example below to describe the differences between a deficits-based change (traditional problem solving) and a strengths-based change (AI):

Traditional Problem Solving	Appreciative Inquiry
Focus on 'What's Wrong'	Focus on 'What Works'
Identification of Problems	Appreciating the Best of 'What Is'
Search for Root Causes of Failure	Search for Root Causes of Success
'Fix' the Past	Create the Future
Obstacles Treated as Barriers	Obstacles Treated as Ramps into 'New' Territory

• Engage participants in discussion by asking: "Which change strategy would you rather participate in and why?"
• Provide participants with an overview of the AI 4-D Cycle. Using the following figure as a guide, explain the 4-D cycle, including: *Discovery*, *Dream*, *Design* and *Destiny*.

1) Discovery "What gives life?" (the best of what is) *Appreciating*

Working Together to Put Living First

3) Design "What should be— the ideal?" *Co-constructing*

Item and Time	Process

Mini Appreciative Interviews (40 minutes)	• Engage participants in appreciative interviews by asking each person to partner with someone who they do not know well.
	• Taking turns, each person will interview their partner for 10 minutes using the following questions.
	  – Please think about a really great day that you have enjoyed at your community, a day when you felt the happiest you have ever felt about your time here. Describe it. What factors made it meaningful? What came together to make it happen?
	  – Take a moment to dream and visualize the community you really want. What does this ideal community look like? What is happening? What 3 things would help to create this future?
	• Ask participants to listen closely and ask additional questions ('probes') as necessary to gain a full picture.
	• Interviewers should record some key points or memorable quotes to share with the large group.
	• After the interviews, engage participants in a large group discussion to debrief and identify some common themes for Question 1, 'Great Days', and Question 2, 'Ideal Community', and record the common themes on flipchart paper.
	
	'Great Days'
	• What days or types of days were identified as 'great days'?
	• What factors made these days especially 'happy' and 'great'?
	• Please offer supporting quotes to help illustrate some of the key themes
	
	'Ideal Community'
	• What did we describe as images of an 'ideal community'?
	• What things would help to create this future?
	• Please offer supporting quotes to help illustrate some of the key themes.

Planning for the AI summit (60 minutes)	• Hand out a copy of your tentative 3-day schedule for the AI summit (a sample is provided in Appendix 12). (You will learn later in this guidebook that although we held a 3-day summit on 3 concurrent days, our recommendation to others is to bring people from across your organization together for 2 concurrent days, then to have the third day at each individual community). Review the agenda with participants, and ask the following questions:
	  – Do you have any suggested revisions?
	  – Would everyone like to attend?
	  – Would anyone like to co-facilitate a particular exercise?
	
	• Next, ask participants the following question: "Do you have any suggestions for resident or family member panelists for Day 1 of the AI summit?"

Item and Time	Process
Call for advisory team members (30 minutes)	• Share with the group your intent to form an advisory team to act as the guiding force of your organization's culture change efforts. The committee will serve as wise counsel and offer their insights and recommendations as to the flow, intensity, and demands of the culture change process at an organizational level. Discuss the following as a group: "What kind of commitment is required to serve on the advisory team?" • After the group has created some expectations for advisory team members, ask participants if they would be interested in serving on the advisory team. Let them know that they do not need to respond now, but provide a deadline and instructions on who to share their decision with.
Next steps (30 minutes)	• Ask if the group has any further questions, and provide some information about next steps (e.g., proposed meeting date for the first advisory team meeting; how planning for the AI summit will advance; reminder about notification deadline to become a member of the advisory team)

Appendix 10

Action 3.4: Additional resource

*Reflection Questions for Enablers of Authentic Partnerships
(adapted from Dupuis et al., 2012)*

In the second or third meeting of your advisory team, use the questions below to guide a group discussion about how this team can support authentic partnerships and participation from all members.

Connecting and committing

- Who will (or will not) be included on the advisory team? Why?
- What supports might advisory team members need in order to be meaningfully engaged?

Creating a safe space

- How might I/we promote and gauge the emotional and physical comfort of each advisory team member?
- How might I/we nurture supportive relationships with each advisory team member?

Valuing diverse perspectives

- How might I/we demonstrate that I/we value all perspectives and contributions?
- How will we work to resolve differences of opinion?

Establishing and maintaining open communication

- How might I/we ensure that all advisory team members have the opportunity and time to contribute?
- What are some different communication strategies (verbal, non-verbal, technological, creative) I/we can use to enhance participation on our advisory team?

Conduct regular reflection and dialogue

- How can I/we build regular reflection and dialogue into our relationships with organization members who are not a part of the advisory team?
- How can I/we build regular reflection and dialogue into each advisory team meeting?

Appendix 11

Action 3.5: Worksheet

Developing Guiding Principles

Use a *Learning Circle* at 1 or 2 of the early advisory team meetings to generate a list of possible guiding principles. If you need a refresher about how *Learning Circles* work, see Appendix 7.

- Before starting the *Learning Circle*, provide the following definition to participants:

  Guiding principles describe how we will treat each other and how we can expect to be treated, and they should be a part of each of our meetings, either read aloud or visible on a wall, or incorporated in some other way. They are, in essence, like a code of ethics.

- Ask someone to serve as note-taker, writing down people's ideas on flipchart paper.
- Once everyone has had a chance to contribute, facilitate a group discussion, synthesizing and combining similar ideas as appropriate, to generate a draft set of guiding principles.
- Ask for a volunteer to type up the draft set of guiding principles and to email or distribute the draft to advisory team members so they can offer suggested additions and/or revisions before the next advisory team meeting.
- Present the revised principles at the next advisory team meeting for approval by all members.

Learning Circle question:

What is 1 principle we should consider as a possible guiding principle for our advisory team? Please feel free to elaborate on your suggestion.

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Appendix 12

Action 3.6: Additional resource

Sample Agendas for the 3-Day Appreciative Inquiry Summit
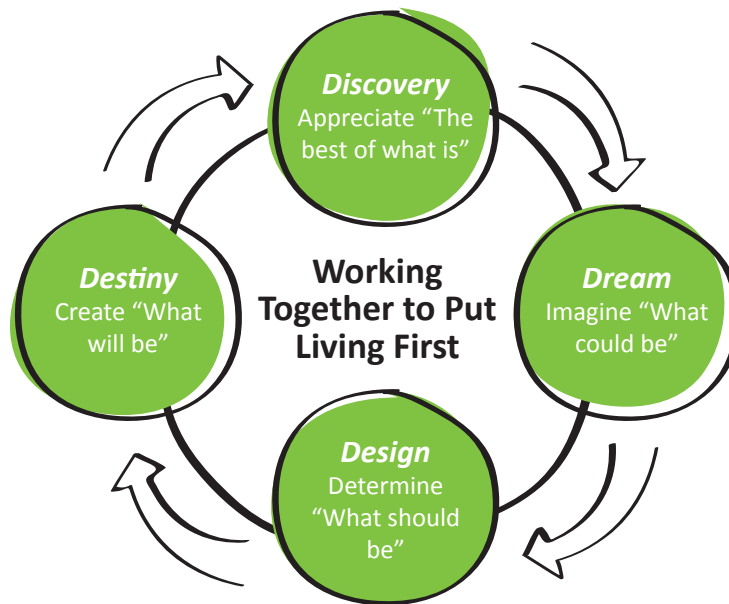
Appreciative Inquiry Summit
Day 1 | *Discovery*

Day 1: Agenda	
Time	**Activities**
8:30 – 8:40	Welcome & introductions
8:40 – 9:20	Introduce AI & 4-D process
9:20 – 9:45	Appreciative interviews in pairs (participants answer the questions developed in Appendix 13) (we recommend selecting 3 questions, 1 from each theme: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future)
9:45 – 10:15	Debrief interviews & identify group themes related to: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future
10:15 – 10:30	Presentation of team member interview findings (present a summary of the pre-summit appreciative interviews with team members)
10:30 – 10:50	Groups prioritize key team member themes related to: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future
10:50 – 11:05	Break
11:05 – 11:20	Inspiring video (of your choosing) of an ideal future

Day 1: Agenda	
11:20 – 11:30	Address from the President, Chief Operating Officer or Chief Executive Officer (their vision of an ideal future)
11:30 – 11:45	Q&A with President, Chief Operating Officer or Chief Executive Officer
11:45 – 12:45	Lunch
12:45 – 1:00	Introduce resident and family panels and exercises
1:00 – 1:40	Resident panel (panelists are asked questions similar to those used in the pre-summit appreciative interviews)
1:45 – 2:25	Family panel (panelists are asked questions similar to those used in the pre-summit appreciative interviews)
2:25 – 2:35	Group discussion about panels and prioritize key themes related to: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future
2:35 – 2:45	Break
2:45 – 3:15	Presentation of resident and family interview findings (present a summary of the pre-summit appreciative interviews with residents and family members); Groups prioritize key resident and family themes related to: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future
3:15 – 3:30	Wrap-up & next steps for Days 2 & 3

Appreciative Inquiry Summit
Day 2 | *Dream* & *Design* Part 1

Day 2: Agenda	
Time	*Activities*
9:00 – 9:15	Welcome & presentation of 'discovery' findings (key themes related to: Our Positive Core; Our Strengths and Contributions; and Our Ideal Future)
9:20 – 10:15	Teams develop creative enactments of dreams (participants build on 'discovery' findings and create skits of their team's shared image of the ideal future)
10:20 – 11:20	Teams perform creative enactments of dreams
11:25 – 11:40	Teams generate actionable ideas (based on the creative enactments, teams generate 2 actionable ideas to accelerate our path toward our shared images of an ideal future)
11:45 – 12:00	Teams present and post actionable ideas
12:00 – 12:10	Team members vote for favourite actionable ideas
12:15 – 1:15	Lunch

Day 2: Agenda	
1:15 – 1:25	Introduce opportunity areas (top actionable ideas) and instructions for creating aspiration statements; team members 'vote with their feet' to form work groups
1:30 – 1:55	Groups draft aspiration statements
2:00 – 3:00	Groups share aspiration statements and receive feedback from other team members
3:00 – 4:00	Break and fun, team-building activity
4:00 – 4:20	Groups revise aspiration statements
4:25 – 4:50	Groups share final aspiration statements
4:50 – 5:00	Wrap-up and next steps for Day 3

Appreciative Inquiry Summit
Day 3 | *Design* Part 2

Day 3: Agenda	
Time	*Activities*
9:15 – 9:30	Welcome
9:35 – 10:35	Work on *Design* plans (developing goals, strategies and action items to reach each aspiration)
10:35 – 12:00	Fun, team-building activity
12:00 – 1:00	Lunch
1:00 – 1:45	Community teams pair up, gain feedback and revise *Design* plans
1:50 – 2:50	Teams present the aspiration statements they chose to focus on & walk through 1 developed goal with the group
2:50 – 3:05	Continue *Design* planning in each community, to engage more members in the process
3:05 – 3:20	Open mic testimonials

Appendix 13

Action 4.1: Worksheet

Prepare for Your Appreciative Interviews

Prepare for your appreciative interviews by doing these 3 things with your learning partners and advisory team:

- Develop positive 'core' questions
- Test your positive questions in interview pairs
- Develop a lead-in statement for your appreciative interviews

Develop your positive questions

Use the following 'core' question structure (and examples) to develop your own set of positive questions to guide the *Discovery* cycle of your AI process:

Type of question	Example: Whitney and Trosten-Bloom (2003)	Example: Schlegel Villages
A question about your positive core (i.e., qualities, attributes, strengths, and assets that already exist within the organization)	Tell me about a peak experience or high-point story in your professional life… a time when you felt the most alive, most engaged, and really proud of yourself and your work.	Think about a great day you enjoyed at your village; 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?
A question about individual and collective strengths and contributions	Without being humble, what do you value most about • yourself, and the way you do your work? What unique skills and gifts do you bring to this team and organization? • your work? • your team? • your organization and its larger contribution to society or the world? What are the core factors that give life to this organization, when it is at its best?	What strengths or contributions do you bring to your village?
A question about images for an ideal future	If you had a magic wand, and could have any 3 wishes granted to heighten the health and vitality of this organization, what would they be?	Take a moment to dream and visualize the village you really want. What does this dream look like? What is happening? What 3 things would help us create this future?

Please use the space provided to record your draft questions.

Positive questions - draft	Which aspect does this positive question address?
	• Positive Core • Strengths and Contributions • Ideal Future
	• Positive Core • Strengths and Contributions • Ideal Future
	• Positive Core • Strengths and Contributions • Ideal Future
	• Positive Core • Strengths and Contributions • Ideal Future
	• Positive Core • Strengths and Contributions • Ideal Future

Test your positive questions

Now that you have developed a set of positive questions, it is time to take them on a test drive. Please find a partner and take turns conducting appreciative interviews with each other using your draft questions. When you are the interviewer, consider using interview probes to dig deeper.

Examples of interview probes include:
• Could you tell me more about that?
• Could you please offer a description or give me an example?
• What happened that led you to this point of view?
• How does that make you feel?
• Here's what I heard…is that what you mean?

Invite the interviewee to share detailed responses and descriptive stories rather than providing short answers, and you can share your ideas, too. As you listen, jot down a few notes from the interview in the space provided on the following page. This will take about 20 minutes (10 minutes per interview).

Interview Notes

Name of person interviewed:

_____

What factors of your organization's positive core did your partner identify?

_____

_____

_____

What does your partner value most about your organization?

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What strengths and contributions does your partner bring to the organization?

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

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What did your partner think would help to create this future?

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Once you have completed your interviews with each other, as a group, discuss if any revisions are necessary as you finalize your set of positive questions. Consider the following:

- Is each question positive and uplifting?
- Is each question accessible and easy to understand?
- Were you and/or your partner able to respond to each question easily?
- Do your questions take the past, present and future into consideration?
- Do your questions help explore possible transitions from the current reality to the imagined future?
- Do your questions draw on peoples' lived experiences?

In selecting your final questions, ensure that you have at least 1 question within each category: Positive Core, Strengths and Contributions, and Ideal Future.

Develop your lead-in statement

In addition to positive questions, Whitney and Trosten-Bloom (2003) also suggest developing a lead-in statement to introduce interviewees to the affirmative topic, such as 'working together to put living first':

> Quality lead-ins plant that half-full assumption in the minds of interviewees. They describe the topic or quality at its best. They show interviewees the benefit of the topic. Sometimes they paint a picture of the positive outcomes that are possible, when the topic or quality is significantly present in an organization. They make people want more of the topic, within their organizations and within themselves. (p. 152)

Therefore, during appreciative interviews, instead of beginning the interview by asking the questions you have developed, it is important to begin with a lead-in (i.e., introductory) statement to provide context and help set the stage for more detailed responses.

Please work collaboratively to draft, revise, and finalize an effective lead-in statement for your appreciative interviews. Please use the space below to record your ideas.

Lead-In Statement:

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Appendix 14

Action 4.2: Worksheet

Identify Appreciative Interviewers

Use a *Learning Circle* to identify potential appreciative interviewers and determine the type of training and support they will need to be successful. For a refresher on how *Learning Circles* work, see Appendix 7.

Question 1:

Who should we recruit to be our volunteer interviewers?

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Question 2:

What type of training and/or support will our volunteer interviewers need to be successful?

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Appendix 15

Action 4.2: Facilitator guide

*Facilitator Guide for Appreciative Interviews
(Residents and Family Members)*

Introduction

This document is meant to aid you in the facilitation of appreciative interviews with residents and family members. Because an appreciative approach is so different from a traditional 'problem solving' approach, a brief introduction might be helpful to interview participants. It might be helpful to explain that this approach, called AI, is not meant to avoid or ignore problems. If people want to talk about problems, they most likely will. But, hopefully, by engaging in some appreciative thinking, problems can be reframed as opportunity areas, like ramps into a more ideal future.

For example, consider the following question: "Take a moment to dream and visualize the living environment you really want. What does this ideal community look like? What is happening? What 3 things would help to create this future?" Participants could respond something to the effect of, "My ideal community would have: 1) professional and private laundry service; 2) meals when and where I want; and 3) a peaceful environment without any overhead calls on the public address system."

In an effort to describe the AI approach, consider reproducing the table below onto a flipchart, making it the first station that participants visit when they arrive at the interview. If interest in the AI process is expressed, take a few minutes to describe your organization's appreciative focus. Otherwise, move directly into the lead-in statement and questions.

Flipchart 1

Traditional Problem Solving	Appreciative Inquiry
Focus on 'What's 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

With AI, the art of asking positive questions strengthens capacity to anticipate positive potential toward change. The positive interview questions (created in Appendix 13) are designed to elicit community members' best stories related to living or spending time within their community. These stories help ignite positive energy and enthusiasm for change. The common themes that emerge from these stories represent the collective experiences of residents and family members and will contribute to the identification of your organization's 'positive core'. The positive core is made up of those qualities, attributes, strengths, and assets that already exist within the organization, all of which will take your organization into the future, provide continuity, and act as a source of pride and confidence for each community member.

Interview questions

Write each of the appreciative questions that you developed in Appendix 13 on a separate sheet of flipchart paper, and display them where they can be easily viewed during your appreciative interviews.

Facilitation information

Set-up
- Choose a comfortable environment, free of noise and distraction.
- Post your prepared flipcharts around the room.
- Bring a digital camera to take pictures of your process.
- Bring a digital/audio recorder to help you capture great quotes.
- Prepare and print copies of individual response forms (a list of appreciative questions with room to respond) so that residents and family members who do not want to participate in the interviews still have a way of providing feedback.
- Remember to make arrangements for tasty food and beverages to attract and thank participants.
- Ask your leadership team to assist you in promoting, inviting and supporting (as needed) resident and family participation, encouraging them to take time out of their day to speak their minds, contribute their insights and ideas, and have their voices heard.

During interviews
- Take time to build a connection with participants before beginning the conversation. When helpful, share information about the AI process (flipchart 1) and answer any questions.
- Invite participants to share descriptive stories rather than short answers or opinions. Use prompts like, "Could you tell me more about that?" or "Could you please describe that to me?" to go deeper into participants' experiences, visions, and stories.
- Remember that participants' stories are personal and affective – almost intimate. They are sharing their hearts and souls, so listen attentively and appreciatively.
- Encourage participants and give free reign to imagine into the future. Anything is possible.
- Give participants time and space to take things at their own pace. If someone has a hard time answering a question, you can offer to come back to it later.
- Transcribe stories, descriptive phrases, and important words onto the flipcharts. Ask participants to repeat parts of their stories that you really want to capture verbatim. Go back over what you have learned and confirm for accuracy.

- Take photos and consider using a digital/audio recorder to capture great quotes (If you have your smart phone handy, you can use it. Other digital/audio recorders may be used as well.)
- Close by summarizing something that was said that really inspired you.

Analyzing and reporting interview findings
- At the end of each day, have all of the appreciative interviewers sit down together to review all of the stories/responses. What do you find most important, interesting, promising, and/or common? Identify highlights and key themes for each question. Select supporting quotes to help illustrate or describe key themes.
- Record these findings and create a summary report of your resident and family member interviews and provide a copy to the AI summit organizers so that these reports can be used in a structured group activity.

Appendix 16

Action 4.2: Facilitator guide

*Facilitator Guide for Appreciative Interviews
(Team Members)*

Introduction

This document is meant to aid you in the facilitation of appreciative interviews with team members. Because an appreciative approach is so different from a traditional 'problem solving' approach, a brief introduction might be helpful to interview participants. It might be helpful to explain that this approach, called AI, is not meant to avoid or ignore problems. If people want to talk about problems, they most likely will. But, hopefully, by engaging in some appreciative thinking, problems can be reframed as opportunity areas, like ramps into a more ideal future.

For example, consider the following question: "Take a moment to dream and visualize the living environment you really want. What does this ideal community look like? What is happening? What 3 things would help to create this future?" Participants could respond something to the effect of, "My ideal community would have: 1) professional and private laundry service; 2) meals when and where I want; and 3) a peaceful environment without any overhead calls on the public address system."

In an effort to describe the AI approach, consider reproducing the table below onto a flipchart, making it the first station that participants visit when they arrive at the interview. If interest in the AI process is expressed, take a few minutes to describe your organization's appreciative focus. Otherwise, move directly into the questions.

Flipchart 1

Traditional Problem Solving	Appreciative Inquiry
Focus on 'What's 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

With AI, the art of asking positive questions strengthens capacity to anticipate positive potential toward change. The positive interview questions (created in Appendix 13) are designed to elicit community members' best stories related to living or spending time within their community. These stories help ignite positive energy and enthusiasm for change. The common themes that emerge from these stories represent the collective experiences of team members and will contribute to the identification of your organization's 'positive core'. The positive core is made up of those qualities, attributes, strengths, and assets that already exist within the organization, all of which will take your organization into the future, provide continuity, and act as a source of pride and confidence for each community member.

Interview questions

Write each of the appreciative questions that you developed in Appendix 13 on a separate sheet of flipchart paper, and display them where they can be easily viewed during your appreciative interviews.

Facilitation information

Set-up
- Choose a comfortable environment, free of noise and distraction.
- Post your prepared flipcharts around the room.
- Bring a digital camera to take pictures of your process.
- Bring a digital/audio recorder to help you capture great quotes.
- Prepare and print copies of individual response forms (list of appreciative questions with room to respond) so that team members who do not want to participate in the interviews still have a way of providing feedback.
- Remember to make arrangements for tasty food and beverages to attract and thank participants.
- Ask your leadership team to assist you in promoting, inviting and supporting (as needed) team member participation, encouraging them to take time out of their day to speak their minds, contribute their insights and ideas, and have their voices heard.

During interviews
- Take time to build a connection with participants before beginning the conversation. When helpful, share information about the AI process (flipchart 1) and answer any questions.
- Invite participants to share descriptive stories rather than short answers or opinions. Use prompts like, "Could you tell me more about that?" or "Could you please describe that to me?" to go deeper into participants' experiences, visions, and stories.
- Remember that participants' stories are personal and affective – almost intimate. They are sharing their hearts and souls, so listen attentively and appreciatively.
- Encourage participants and give free reign to imagine into the future. Anything is possible.
- Give participants time and space to take things at their own pace. If someone has a hard time answering a question, you can offer to come back to it later.
- Transcribe stories, descriptive phrases, and important words onto the flipcharts. Ask participants to repeat parts of their stories that you really want to capture verbatim. Go back over what you have learned and confirm for accuracy.

- Take photos and consider using a digital/audio recorder to capture great quotes (If you have your smart phone handy, you can use it. Other digital/audio recorders may be used as well.)
- Close by summarizing something that was said that really inspired you.

Analyzing and reporting interview findings
- At the end of each day, have all of the appreciative interviewers sit down together to review all of the stories/responses. What do you find most important, interesting, promising, and/or common? Identify highlights and key themes for each question. Select supporting quotes to help illustrate or describe key themes.
- Record these findings and create a summary report of your team member interviews and provide a copy to the AI summit organizers so that these reports can be used in a structured group activity.

Appendix 17

Action 4.3: Worksheet

Advertise and Promote your Appreciative Interviews

Use a *Learning Circle* to discuss and plan your communication strategy for the appreciative interview component of your AI process. For a refresher on how *Learning Circles* work, see Appendix 7.

Learning Circle question

How should we advertise and promote the appreciative interview component of our AI process?

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Appendix 18

Action 5.1: Facilitator guide

Facilitator Guide for Day 1 of the Appreciative Inquiry Summit

The following guide will help you facilitate Day 1 of the AI summit to explore the *Discovery* cycle of the 4-D AI process. This document features what worked well for our journey and is meant as a guide. You will want to tailor your AI summit to best suit your culture change journey.

Item & time	Process
Welcome & introductions (10 minutes)	• Welcome participants and introduce the facilitators for the day.
Introduce AI & 4-D process (20 minutes)	• Introduce participants to AI and the 4-D process. Consider using the description and figure below. – In our search for a culture change process that would inspire wide-spread participation, enhance our strengths, foster collaborative learning, mobilize democratic action, and respect the uniqueness of each community member, we discovered that all of this can be achieved through AI (Cooperrider & Whitney, 1999). **The AI 4-D Cycle** **1) Discovery** "What gives life?" (the best of what is) *Appreciating* **2) Dream** "What might be?" (What is the world calling for) *Envisioning Results* **3) Design** "What should be– the ideal?" *Co-constructing* **Working Together to Put Living First**

Item & time	Process

Introduce AI & 4-D process (20 minutes)
 	
 Cont'd
	• Next, provide participants with a handout summarizing AI and its assumptions (Handout #1 on page 57 of this document), and ask them to listen while you read the text aloud and underline ideas that are meaningful to them.
	 • Ask a sample of participants to share the points they found most meaningful with the group.
	 • Next, provide participants with a handout contrasting a traditional approach (to 'culture change') with an appreciative approach (to 'culture enhancement') (Handout #2 on page 58). Ask them to discuss the following questions with their table:
	   – How do the illustrations relate with your change experiences?
	   – Which approach would you rather participate in?
	 • Ask participants to note that AI is not meant to avoid or ignore problems. If people want to talk about problems, they most likely will. But, hopefully, by engaging in some appreciative thinking, problems can be reframed as opportunity areas, like ramps into a more ideal future. Ask participants to discuss with their table how AI might support and strengthen your continuing efforts to move toward a social model of living (vs. an institutional model of care).
	 • Ask a sample of participants to share some key points.
	 • Close this section by summarizing that the AI summit incorporates 4 cycles of the 4-D process: *Discovery*, *Dream*, *Design*, and *Destiny*, and that today (*Discovery*) focuses on discovering your positive core from the perspectives of team members, senior leaders, residents, and family members. You may want to share the following quotes:
	   – "The real act of discovery consists not in finding new lands but seeing with new eyes." ~ Marcel Proust
	   – "… I have seen there is no more powerful way to initiate significant change than to convene a conversation… It is always like this. Real change begins with the simple act of people talking about what they care about." ~ Margaret Wheatley

Appreciative interviews in pairs (25 minutes)	• As a lead-in to the next activity, consider using the following script: – At the heart of this discovery process is the appreciative interview which involves the art of asking positive questions designed to elicit stories about high-point experiences, what people value, and what they hope and wish for to enhance the health and vitality of our organization. The key themes that emerge from these stories represent the collective experiences of participants and contribute to the identification of our positive core. The positive core is made up of those qualities, attributes, strengths, and assets that already exist within the organization and help take us into a more ideal future. • Ask participants to find a partner at their table and to take turns interviewing each other using the questions developed in Appendix 13 (we recommend selecting 3 questions, 1 from each theme: Our Positive Core, Our Strengths and Contributions, and Our Ideal Future). Each interview should last approximately 10 minutes. During each interview, interviewers should encourage interviewees to go deeper and share their experiences, visions, and stories. Ask interviewers to record highlights, quotes, and key themes. Announce when each interview has 2 minutes remaining so participants can wrap up.

Item & time	Process
Debrief interviews & identify group themes (30 minutes)	• Participants will now share what they have learned from their interview with their tablemates. Each table will manage its own discussion, data, time, and reports. Ask each table to decide who will serve in the following roles for this activity: – **Discussion Leader:** Assures that each person who wants to speak is heard within the time available and keeps the group on track to finish on time. – **Timekeeper:** Keeps the group aware of the amount of time left, signaling the time remaining to the person reporting. – **Recorder:** Writes the group's output on flipcharts/papers/post-its, using speaker's own words. Asks people to restate long ideas briefly. • After each table has assigned roles, ask participants to go around the table, and have each person introduce their interview partner and briefly share highlights from each question. • With the help of the group, the recorder identifies 2 or 3 highlights or key themes for the table and records them under the following headings using Handout #3 (page 60): Our Positive Core, Our Strengths and Contributions, and Our Ideal Future.
Presentation of team member interview findings (15 minutes)	• Present the findings from the team member appreciative interviews conducted prior to the AI summit. Consider providing a handout with the summarized findings. Engage participants in a discussion by asking the following question: How do these findings compare with the highlights and key themes identified at your table?
Groups prioritize key team member themes (20 minutes)	• At each table, ask participants to compare and contrast the findings from the team member interviews with the highlights and key themes they discovered at their table. • Ask each table to consider all of the data that has been presented and discussed so far at the summit and to collectively select 2 or 3 of the most important highlights or key themes under each of the following headings: Our Positive Core, Our Strengths and Contributions, and Our Ideal Future. Have the recorder write these selected themes or highlights on coloured paper (1 colour of paper for each heading, and 1 theme or highlight per sheet of paper) and tape each sheet to the wall under the corresponding heading. Announce when participants have 5 minutes remaining, and ensure everyone has posted their themes to the wall before the time is up.
Break (15 minutes)	• Encourage participants to view all of the themes posted on the wall during the break.

Item & time	Process
Inspiring video (15 minutes)	• Select an inspiring video that speaks to the theme of discovery or that you feel will help inspire participants as you begin your culture change journey. Consider engaging participants in a quick discussion about what aspects of the video resonated most with them.
Address from the President, Chief Operating Officer or Chief Executive Officer (10 minutes)	• This activity demonstrates that leaders at the highest level are engaged in and supportive of culture change, and that they, too, are an important part of the collective. Consider asking these leaders to share their high-point stories or images for an ideal future.
Question & Answer (Q&A) with the President, Chief Operating Officer or Chief Executive Officer (15 minutes)	• This activity demonstrates that leaders at the highest level are engaged in and supportive of culture change. Consider preparing questions in advance or opening the floor for questions from participants.
Lunch (60 minutes)	• Encourage participants to view all of the themes posted on the wall during the break.
Introduce resident & family panels (15 minutes)	• Consider using the following script to introduce the afternoon panel sessions. Draw from your own experiences and add in stories or examples to emphasize the need for collaboration and widespread engagement. – Our commitment to resident-centeredness transcends the context of care to all matters of living. As such, we are committed to engaging in and supporting a truly collaborative culture change process that includes residents and family members in discovery and decision-making as we continue our evolution toward a more ideal social model of living. We will be providing summaries from recent interviews conducted with residents and family members from across the organization. But first, we have the honour of hearing directly from several resident and family member panelists as they share their perspectives on our positive core, our strengths and contributions, and their hopes for an ideal future.
Resident panel (40 minutes)	• Introduce the resident panelists. • Ask participants to take notes about key themes or highlights. • Facilitate a Q&A session. Consider asking questions similar to those developed in Appendix 13. Leave some time for open discussion with participants.
Family panel (40 minutes)	• Introduce the family member panelists. • Ask participants to take notes about key themes or highlights. • Facilitate a Q&A session. Consider asking questions similar to those developed in Appendix 13. Leave some time for open discussion with participants.

Item & time	Process
Group discussion about panels and identification of key themes (10 minutes)	• Ask each table to select a discussion leader, timekeeper, and recorder. Have each participant briefly share a few highlights or key themes that they took away from the resident and family panels. With the help of the group, the recorder identifies 2 or 3 highlights or key themes for their table and records them under the following headings using Handout #4 (page 61): Our Positive Core, Our Strengths and Contributions, and Our Ideal Future.
Break (15 minutes)	
Presentation of resident and family member interview findings; Groups prioritize key resident & family themes (30 minutes)	• Present the findings from the resident and family appreciative interviews conducted prior to the AI summit. Consider providing a handout with the summarized findings. • Ask each table to consider all of the data that has been presented and discussed relating to residents and family members and to collectively select 2 or 3 of the most important highlights or key themes under each of the following headings: Our Positive Core, Our Strengths and Contributions, and Our Ideal Future. Have the recorder write these selected themes or highlights on coloured paper (1 colour of paper for each heading, and 1 theme or highlight per sheet of paper) and tape each sheet to the wall under the corresponding heading. Announce when participants have 5 minutes remaining, and ensure everyone has posted their themes to the wall before the time is up.
Wrap-up and next steps for Days 2 and 3	• Now the walls are covered with your discoveries. Ask participants to take a moment before leaving to take a tour of all of the highlights and key themes on the walls. A summary of the top 10 key themes in each area will be provided on the morning of Day 2. Participants will use these themes as building blocks during the Dream cycle of the 4-D process. • Have a data analysis team (comprised of learning partners or advisory team members) collect and synthesize the data into the top 10 most common themes under each heading.

Handout #1: Introduction to 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)

Assumptions of AI (Hammond, 1996)
- In every society, organization, or group, something works.
- What we focus on becomes our reality.
- Reality is created in the moment, and there are multiple realities.
- The act of asking questions of an organization or group influences the group in some way.
- People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known).
- If we carry parts of the past forward, they should be what is best about the past.
- It is important to value differences.
- The language we use creates our reality.

Handout #2: Contrasting Traditional and Appreciative Approaches

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APPRECIATIVE APPROACH

VIBRANT ALIVE

SEARCH FOR WHAT WORKS

AMPLIFY WHAT GIVES LIFE

TIME FLIES

NEW POSSIBILITIES

UNEXPECTED CREATIVITY

ORGANIC, EMERGENT

MORE ALIVE!

IN-SYNC

WHOLE GREATER THAN SUM OF PARTS

ENERGY CAN'T BE STOPPED

HOW DOES THIS HAPPEN?!?

★ ALL (OR ALL LEVELS) INVOLVED, SOLUTIONS FROM WITHIN

★ FOCUS ON WHAT WORKS

★ SEARCH FOR ROOT CAUSES OF SUCCESS
"If you look for successes, you'll find and create more successes"

★ CREATE THE FUTURE

★ OBSTACLES TREATED AS RAMPS INTO NEW TERRITORY

HIGH ENERGY
E — F

(c) 2001 Dave Potter

http://appreciativeinquiry.case.edu/practice/toolsModelsPPTsDetail.cfm?coid=845

Handout #3: Highlights and Key Themes from Appreciative Interview

Our positive core

- _____
- _____
- _____
- _____
- _____
- _____

Our strengths and contributions

- _____
- _____
- _____
- _____
- _____
- _____

Our ideal future

- _____
- _____
- _____
- _____
- _____
- _____

Handout #4: Highlights and Key Themes from Resident and Family Panels

Our positive core

- _____

- _____

- _____

- _____

- _____

- _____

Our strengths and contributions

- _____

- _____

- _____

- _____

- _____

- _____

Our ideal future

- _____

- _____

- _____

- _____

- _____

- _____

Appendix 19

Action 6.1: Facilitator guide

Facilitator Guide for Morning of Day 2 of the Appreciative Inquiry Summit

The following guide will help you facilitate the morning of Day 2 of the AI summit to explore the Dream cycle of the 4-D AI process. This document features what worked well for our journey and is meant as a guide. You will want to tailor your AI summit to best suit your culture change journey.

Item & time	Process

Welcome & presentation of discovery findings (15 minutes)	• Welcome participants and present the strongest, most common (e.g., 'top 10') themes under: Our Positive Core, Our Strengths and Contributions, and Our Ideal Future, discovered on Day 1 of the Summit.
	 • Introduce participants to the Dream cycle of the 4-D process. The primary purpose of the Dream cycle is to expand or extend people's sense of what is possible. Cooperrider, Whitney, and Stavros (2008) explain that the Dream cycle:
	   – …occurs when the best of 'what is' has been identified; the mind naturally begins to search further and to envision new possibilities. Valuing the best of 'what is' leads to envisioning what might be. Envisioning involves passionate thinking, and creating a positive image of a desired and preferred future.
	   – …amplifies the positive core and challenges the status quo by envisioning more valued and vital futures than those that are currently envisioned by organization members and stakeholders. The *Dream* cycle asks the people whose future it is to engage with each other to create more vital and life-giving images for their future.
	   – …is practical in that it is grounded in the organization's history [and strengths]. It is also generative in that it seeks to expand the organization's potential, keeping in mind the voices and hopes of its stakeholders.
	 • You may want to share the following quotes:
	   – "No problem can be solved from the same level of consciousness that created it." ~ Albert Einstein
	   – "When I dream alone, it is just a dream. When we dream together, it is the beginning of reality. When we work together, following our dream, it is the creation of Heaven on Earth." ~ Brazilian Proverb

Item & time	Process

Teams develop creative enactments of dreams (55 minutes)	• Engage participants in a guided imagery exercise by reading aloud the following instructions:
	  – Please close your eyes. Imagine that we are 5 years in the future, and upon returning to your long-term care community you are both amazed and delighted by what you see. Visualize the long-term care community you really want. What is happening? What do you see, feel, sense, or hear? Focus and get a really clear picture. Wait a few minutes. Now open your eyes.
	• Ask participants to record some of their thoughts using Handout #1 (page 65).
	• Next, divide participants into teams and assign each team a breakout room.
	• Once teams are settled in their breakout rooms, they need to:
	  – Select a discussion leader, timekeeper, and recorder.
	  – Share their hopes and aspirations for LTC 5 years into the future.
	  – Brainstorm a list of themes or opportunities related to their visions.
	  – Review key themes from yesterday's *Discovery* cycle.
	  – Based on the group's brainstormed list of themes and the discovery themes, through dialogue, choose 3-5 key themes or ideas regarding their team's ideal future.
	  – Collaboratively develop a 4-minute creative enactment to convey their shared images of the ideal future. *Examples:* TV news skit or talk show; a song or poem; a 'day in the life' story or skit; a mock interview or resident move-in; a mural; etc. Use props, if desired.
	  – Return to the main room at the agreed upon time to present their creative enactment.

Teams perform creative enactments of dreams (60 minutes – depending on number of creative enactments)	• Each team performs their creative enactment for all participants. • Ask participants to watch and listen closely for common themes and ideas and to take notes.

Item & time	Process
Teams generate actionable ideas (15 minutes)	• After all of the creative enactments, ask participants to return to their breakout rooms and share their observations. Again, teams need to assign a discussion leader, timekeeper, and recorder. They will have 15 minutes to accomplish the following tasks: – Share their observations. – Discuss what they found most attractive and/or common in all of the dream enactments. – Collaboratively generate 2 actionable ideas to accelerate their path toward their shared images of an ideal future. Examples of actionable ideas: flexible dining; resident-directed schedules; residential environment; interdisciplinary teams; teamwork; appreciation; etc. – Have the recorder write 2 actionable ideas on 2 separate sheets of paper. – Return to the main room at the agreed upon time to present actionable ideas.
Teams present and post actionable ideas (15 minutes)	• When the teams return to the main room, ask each recorder to read their team's 2 actionable ideas as he/she tapes them to the wall.
Team members vote for favourite actionable ideas (15 minutes)	• Once all of the actionable ideas have been read and consolidated (if needed), ask participants to use sticky dots or bingo dabbers to vote for the 2 ideas that they find the most attractive and powerful; ideas they hope to explore for the rest of the AI Summit.
Lunch (60 minutes)	• During lunch, ask your data analysis team to tally the votes and identify the most popular/common actionable ideas. The ideas with the strongest show of support. At Schlegel Villages, 8 ideas had strong support; your group may find fewer or more ideas with strong support. These actionable ideas will become 'opportunity areas', and may need to be given shorter, temporary titles to easily share them with participants.

Handout #1: Guided Imagery Exercise

What is happening? What do you see, feel, sense, or hear?

_____

_____

_____

_____

_____

What do you think would need to happen in order for this change come about?

_____

_____

_____

_____

_____

What is 1 thing that we can do today to support this vision?

_____

_____

_____

_____

_____

Appendix 20

Action 7.1: Facilitator guide

Facilitator Guide for the Afternoon of Day 2 of the Appreciative Inquiry Summit

The following guide will help you facilitate the afternoon of Day 2 of the AI summit to explore the *Design* cycle of the 4-D AI process. This document features what worked well for our journey and is meant as a guide. You will want to tailor your AI summit to best suit your culture change journey.

Item & time	Process
Introduce opportunity areas and instructions for creating aspiration statements; team members 'vote with their feet' to form design teams (10 minutes)	• Introduce participants to the *Design* cycle of the AI 4-D process, where 'what could be' is translated into 'what should be' through the creation of aspiration statements and operational goals and strategies. According to Cooperrider, Whitney and Stavros (2008), aspiration statements are well-worded statements that "articulate the desired organizational qualities, processes, and systems (created in the Dream cycle) to help guide the organization to its higher purpose" (p. 167). An aspiration statement "stretches the realm of the status quo, challenges common assumptions or routines, and helps suggest desired possibilities for the organization and its people. At the same time, it is grounded in what has worked well in the past" (p. 168). Example of aspiration statements are provided on Handout #1 (page 68) of this guide. • Share the top actionable items or 'opportunity areas' that received the most votes. • In the next activity, participants will collaboratively develop aspiration statements for each opportunity area. Provide Handout #2 (page 69) which includes the instructions to help guide teams in collaboratively developing their aspiration statements. • Finally, assign each opportunity area to a breakout room and ask participants to walk to the breakout room for the opportunity area of greatest interest to them. In this sense, they will be 'voting with their feet' to form aspiration statement design teams for each opportunity area. Consider limiting teams to 20 participants.
Groups draft aspiration statements (25 minutes)	• Teams work through Handout #2 (page 69) to develop an aspiration statement.

Item & time	Process

Groups share aspiration statements & receive feedback (60 minutes)	• During this activity, each team will share its aspiration statement and receive important feedback from others. Gaining feedback is essential to this process as your aspiration statements should provide clear, shared visions for the organization's destiny. Provide each table with multiple sheets of coloured paper (red, yellow, and green). Participants will use these papers to indicate their level of acceptance with each aspiration statement:
	  – **RED:** requires significant changes or additional information
	  – **YELLOW:** needs a little fine tuning (i.e., additional examples, a little more provocative, etc.)
	  – **GREEN:** full agreement and support
	• Ask each team's recorder to read their team's aspiration statement to all participants. Ask participants to consider the questions below as they listen. Is the aspiration statement:
	  – **Provocative?** Does it stretch, challenge, or interrupt the status quo?
	  – **Grounded?** Are examples available that illustrate the ideal as a real possibility? Is it grounded in the organization's collective history?
	  – **Desired?** Do you want it as a preferred future?
	  – **Affirmative?** Is it stated in bold and positive terms?
	  – **Participative?** Does it engage and include people in decision-making about the destiny of their own lives?
	• After each statement is read, ask participants to signify their level of acceptance with what was stated (based on the questions above) by holding up the appropriate coloured feedback card. Ask anyone who held up a red or yellow card to briefly provide their specific feedback, in writing, on the back of the coloured card. Assign a few runners to collect the feedback cards and give them to the team's recorder.

Break (60 minutes)	• Consider breaking up the day with a fun activity to keep participants energized and engaged.
Groups revise aspiration statements (20 minutes)	• Participants return to their breakout rooms to review, consider and/or incorporate the feedback they received. Remind teams to assign roles for this discussion: discussion leader, timekeeper, and recorder.
Groups share and celebrate final aspiration statements (15 minutes)	• Each team presents their final aspiration statement to all participants. • Consider ways to celebrate your shared aspirations.
Wrap-up and next steps for Day 3 (10 minutes)	• On Day 3, continuing in the *Design* cycle, participants will work collaboratively, using these aspiration statements as the foundation, and develop draft operational planning goals and strategies.

Handout #1: Aspiration Statement Examples

Schlegel Villages' Aspiration Statements:

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 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 and community members (residents, families, team members, and policy makers) the results and implications of research on aging through various channels including weekly communications 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.

Handout #2: Aspiration Statement Worksheet

1. Once you are assembled as group around a particular opportunity area of interest, please select a discussion leader, timekeeper, and recorder.

2. Put yourselves 5 years into the future. Visualize the community you really want, from the perspective of the opportunity area you have chosen. As a group, discuss the following:
   • What is happening?
   • How did this change come about; what helped it happen?
   • What are the things that support this vision: leadership, education, structures, practices, procedures, etc.?
   • What makes this vision exciting to you?
   • How does this vision maximize dedication to residents, family members, and team members and the growth of the organization?

3. Capture this vision or dream in a 5-year aspiration statement. To get you started you may want to use the following:
   • "Five years from now, what we most want to aspire to in terms of (your chosen opportunity area) is…"
   • Then craft an aspiration statement as though it is something already happening today.
      – Use vivid language
      – Be positive
      – Be bold, provocative… make it a stretch that will attract others

4. Draft your aspiration statement on flipchart paper.

5. Return to the main room to share and receive feedback on your aspiration statement.

Appendix 21

Action 7.4: Facilitator guide

Facilitator Guide for Day 3 of the Appreciative Inquiry Summit

The following guide will help you facilitate Day 3 of the AI summit to address the *Design* cycle of the 4-D AI process. This document features what worked well for our journey and is meant as a guide. You will want to tailor your AI summit to best suit your culture change journey.

Item & time	Process

Welcome (15 minutes)	• Day 3 continues advancing the *Design* cycle of the 4-D AI process by engaging participants in beginning to develop operational goals and strategies to achieve your *Destiny*. Share with participants that the goal for today is not to complete these operational plans, but rather to begin having conversations about what aspirations they'd like to focus on in the coming year and how to work towards them. Participants will want to engage a much larger and diverse group in selecting aspirations and developing final goals and strategies.
	• You may want to open the day with the following quotes:
	  – "If I were to wish for anything, I should not wish for wealth and power, but for the passionate sense of potential, for the eye which, ever young and ardent, sees the possible. Pleasure disappoints; possibility never." ~ Kierkegaard
	  – "Speak only that which you choose to have come into manifestation now and continuously." ~ Robert Tennyson Stevenson
	  – "Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." ~ Margaret Mead

Work on *Design* plans (60 minutes)	• Assign participants to teams (by home communities if applicable). Ask teams to assign roles (discussion leader, recorder, and timekeeper) and collaboratively select 2-3 aspirations of most interest to them.
	• Next, ask participants to select 1 aspiration and discuss the following questions, recording responses on flipchart paper:
	  – Where are we today? What are our current practices and procedures?
	  – What are our core strengths that will help us to achieve this desired aspiration statement?
	  – How long will it take us to realize our dream (i.e., months, a year, multiple years, etc.)?

Item & time	Process

Work on *Design* plans
(60 minutes)
 	
Cont'd
	• Using the selected aspiration statement, ask participants to brainstorm and record on flipchart paper the goals they will need to accomplish as well as the necessary strategies needed to achieve the desired aspiration statement. Consider providing the following definitions:
	
	Goals: Each aspiration statement is a word picture of a future reality. To get to this desired state, you will need to plan and execute a goal(s) – these are like 'mileposts' that mark progress along the journey. Your first step is to brainstorm some goals, or various check points along the path towards realizing your dream.
	
	Strategies: Remember that collaboration is the path to true change the energy for change that is unleashed with the involvement of many is bound to be greater than what can be generated by a very small group. Brainstorm ideas about specific things that can occur now or in the new future to engage many community members in this quest. When strategizing, consider the following questions:
	– How can we best communicate the vision for this aspiration statement, goals and plan with other members of our community?
	– Who needs to be involved in designing and implementing the various goals (departments, individuals, internal and external resources or supports)?
	– Who can serve as the champion(s) for this dream?
	– How will we incorporate feedback from all community members?
	    • Initially?
	    • Along the journey?
	– How will we measure our success?
	– How will we communicate progress as we move ahead?
	
	• Ask each team to develop a draft action plan for each goal, including the person or people who will be accountable for each action item, and the time frame or end date to complete each action item. Handout #1 (page 74) provides a worksheet to develop the action plans.

Item & time	Process
Work on *Design* plans (60 minutes) *Cont'd*	• Finally, participants will think about the results and the outcomes they expect to see when they execute their action plans and reach their goals. Successful aspiration statements will yield balanced results that can be celebrated in 3 areas: – **People:** What results will occur for our residents, families, team members or other members of our community? – **Quality:** What results will occur that enhance the products, procedures or services that we provide within our community? – **Sustainability:** What results will occur that ensure the long-term financial viability of our organization? This will ensure that these improvements become a permanent part of our future. • Ask participants to record their discussions using Handout #2 (page 75).
Break (60 minutes)	• Consider breaking up the day with a fun activity to keep participants energized and engaged.
Lunch (60 minutes)	
Community teams pair up, gain feedback and revise *Design* plans (45 minutes)	• Pair 2 teams together to share and gain feedback on some of their initial work so far. The goal of this activity is for each team to draw on their partner's feedback and ideas and fully develop 1 goal and action plan related to the promotion of 1 aspiration. Again, this is simply to draft a goal and action plan, as each team will want to engage more community members in this process following the summit.
Teams present the aspiration statements they chose to focus on and walk through 1 developed goal with the group (60 minutes)	• Each team will present their fully-developed goal and corresponding action plan to all participants.
Continue *Design* planning in each community, to engage more members in the process (15 minutes)	• Engage participants in a discussion using the following question: How will we engage widespread participation, in each of our communities, in selecting aspirations and designing operational goals and plans?
Open mic testimonials (15 minutes)	• Invite a sample of participants to share their feedback on the AI summit (e.g., what they have learned, what they found most meaningful). • Close with a summary of some of your own highlights from the summit, and encourage participants to keep the momentum going and advance their operational plans with their community.

Handout #1: Action Plan Worksheet

Aspiration statement:		
Goal:		
Action items	***Person Responsible***	***Timeframe***

Handout #2: Measurable Results Worksheet

Aspiration statement:	
People	
Quality	
Sustainability	

Appendix 22

Action 8.1: Facilitator guide
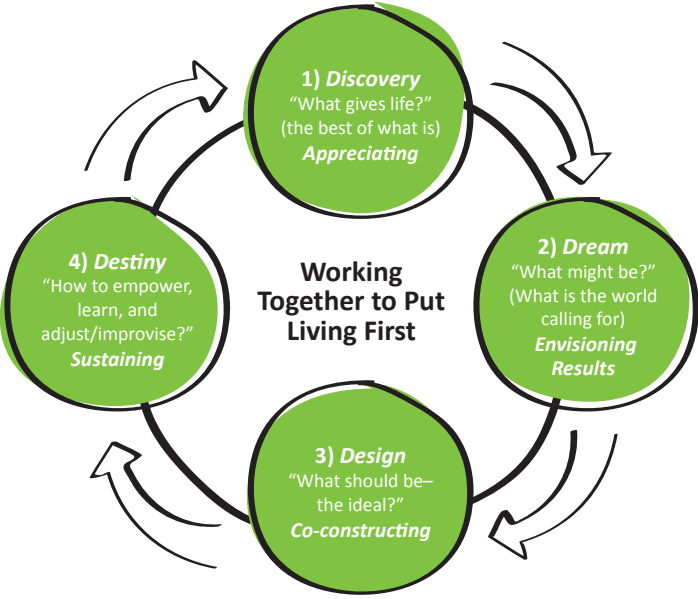
Facilitator Guide for Destiny Retreat

The following guide will help you facilitate the Destiny retreat. This document features what worked well for our journey and is meant as a guide. You will need to tailor your Destiny retreat to best suit your culture change journey.

Item & time	Process
AI review (30 minutes)	• Review AI with participants, consider reading the following text and/or showing select sentences on a slide: – "Appreciative Inquiry 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) • Review the AI 4-D process, consider showing the following figure on a slide as you recap the activities completed in the *Discovery*, *Dream* and *Design* cycles during the AI Summit. Highlight to participants that the *Destiny* cycle of AI emphasizes continuous learning, adjustment, and innovation, and calls us to: – Initiate cross-functional, cross-level and possibly even cross-community projects and teams to foster collaboration toward the realization of our shared aspirations and goals; – Apply AI to programs, processes and systems throughout the entire organization, enhancing our capacity for ongoing positive change; and – Recognize and celebrate what has been learned and transformed in the AI process to date, including the planned and unplanned changes that are taking place.

Item & time	Process
AI review (30 minutes) *cont'd*	• Ask a sample of participants to share their experiences, insights or reflections of the AI process to date. • Finally, review the aspiration statements. **1) Discovery** "What gives life?" (the best of what is) *Appreciating* **2) Dream** "What might be?" (What is the world calling for) *Envisioning Results* **3) Design** "What should be— the ideal?" *Co-constructing* **4) Destiny** "How to empower, learn, and adjust/improvise?" *Sustaining* **Working Together to Put Living First**
Sharing our success stories and new learnings (70 minutes)	• In this activity, participants will reflect on what has changed since the AI process began, share high-points in the process, and recognize and honour those people whose efforts are making a difference. • Assign each community representative or 'storyteller' a table to display their 'Success Story' poster (prepared in advance at each community) and ask that they remain at the table during this session to share their story. Participants will have a chance to visit 2 tables of their choosing. Consider giving participants a few minutes to plan with their community team a strategy to 'divide and conquer' to hear as many stories as possible to bring back to their team. Each storyteller will have 15 minutes to share their story. • After 2 rounds of stories, ask participants to gather in their community teams to discuss their new learnings and make a list of their favourite ('Top 3') ideas generated from this process. Allow 15 minutes. • In the final 15 minutes of this activity, ask each team to quickly share their 'Top 3' ideas.

Item & time	Process
Lunch (30 minutes)	

Learning and growing through Innovation *Learning Circles* (60 minutes)	• This exercise is designed to foster inter-community dialogue so that participants can learn from one another, consider adjustments, inspire new ideas, and generate collective momentum toward shared aspirations.
	• Ask participants to form teams based on the aspiration statement of greatest interest to them and that is currently being advanced in their community. Limit teams to 8-10 people to allow for rich discussion.
	• Provide participants with Handout #1 (page 80) to use as a worksheet.
	• Each team will engage in a 35-minute *Learning Circle* (see Appendix 7 for a refresher on *Learning Circles*) led by a facilitator (learning partner or member of the advisory team). Facilitators will ask the following questions:
	  – What is 1 approach, process or activity your community used to support the realization of this aspiration that worked well?
	  – What is 1 approach, process or activity your community used to support the realization of this aspiration that did NOT work well? What did you learn as a result?
	  – What is 1 suggestion, idea or resource that would support the realization of this aspiration within your community and/or across the organization?
	• Next, teams have 5 minutes to select an 'A-HA!' or key learning from the discussion.
	• Ask each team to select a representative to present their 'A-HA!' learning to all participants.

Item & time	Process

Continuous learning and gauging progress through *World Cafés* (60 minutes)	• In this activity, participants will repeat the collaborative organizational assessment completed at the reflection and awareness-raising event. See Appendix 6 for instructions on how to conduct a *World Café* process.
	• Provide participants with Handout #2 (page 82) to use as a worksheet.
	• This *World Café* exercise includes 2 discussions, called first table and second table:
	  – First table instructions: Using the handout, as a group, locate where we (as an organization) lie on each continuum of the collaborative organizational assessment. Table hosts should note key ideas on flipchart paper and use pencil to indicate the scores on the handout at the end of the discussion.
	  – Second table instructions: Table hosts welcome new guests and briefly share the main ideas, questions and scores from the first table. For example, were there any controversial issues or items with a broad range of scores? Link and connect ideas from the previous table conversation – listening carefully and building on each other's contributions. Finalize the scores by the end of this round using marker.
	• Ask table hosts to bring their final scores to the front so they can be tallied.
	• Engage all participants in discussion about what they learned during the assessment and what has changed since beginning this process.
	• Once you have tallied the results, compare these with the original results, and engage participants in further discussion about the progress that has been made and opportunities to advance the aspirations.

Next steps (15 minutes)	• Close the day by asking participants to:
	  – Continue working collaboratively and appreciatively to advance our shared aspirations.
	  – Broadly share our success stories and learnings with community members and those outside of our community through presentations, events, etc.
	  – Nurture and sustain the membership and work of the advisory team.

Handout #1: Innovation Learning Circle Worksheet

Aspiration statement:

_____

_____

Facilitator:

_____

Note-taker:

_____

Names of participants:

_____

_____

_____

_____

Discussion questions

1. What is 1 approach, process or activity that your community has used to support the realization of this aspiration that has worked well?

_____

_____

_____

_____

_____

_____

2. What is 1 approach, process or activity that your community has used to support the realization of this aspiration that has not worked well? What did you learn as a result?

_____

_____

_____

_____

_____

_____

_____

3. What is 1 suggestion, idea or resource that would support the realization of this aspiration within your community and/or across the organization?

_____

_____

_____

_____

_____

_____

A-HA moment

_____

_____

_____

_____

_____

Handout #2: Collaborative Organizational Assessment Worksheet

Institutional model of care	<------------------------------>	Social model of living
Focus on care	1 2 3 4 5 6 7 8 9 10	Focus on living
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 for residents	1 2 3 4 5 6 7 8 9 10	Decisions with 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 and spontaneous activities
Hierarchical departments	1 2 3 4 5 6 7 8 9 10	Collaborative teams
Staff care for 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
OVERALL AVERAGE: (total score/9)		

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.

Appendix 23

Action 9.1: Additional resource

Sample Terms of Reference for Advisory Teams

Below you will find a sample terms of reference for community advisory teams. This document features what worked well for our journey and is meant as a guide. You will need to tailor your terms of reference to best suit your culture change journey.

Purpose of advisory team

The purpose of the advisory team is to promote and advance the aspirations as they pertain to the community's operational plans. The advisory team does not have formal decision-making authority. Instead, the advisory team acts as an informed and wise counsel, offering collaborative input to help guide the community leadership team in resident-directed decision-making. The advisory team is not a social committee, nor does it work on projects that are not related to the aspirations and/or operational goals. The advisory team does not work in isolation, but takes meaningful steps to thoughtfully and strategically coordinate with other community committees. This attention to coordination will ensure the advisory team is not creating additional work or competing for resources but, rather, working with other committees and work groups toward an overall strategy for culture change. The advisory team may, at times, support the work and interests of these other groups. However, its primary purpose is to provide input, feedback and, at times, implementation support related to the action steps and strategies associated with the community's operational planning goals (i.e., aspirations).

Required number of advisory team members

10-16: Depending on the size of the community, the number of advisory team members will range from no fewer than 10 to no more than 16. Because it may be difficult for all advisory team members to attend all meetings, having 10-16 advisory team members will help ensure a reasonable group size at each meeting. Limiting the advisory team to no more than 16 members ensures that all advisory team members have the opportunity to meaningfully contribute during meetings.

Personal qualities and strengths of advisory team members

Advisory team members lead by example. Therefore, forming a powerful and effective advisory team begins with identifying some of the true leaders within the community. This includes both formal and informal leaders who 'get it'– engaged individuals who seem to embody the spirit, vision, and, most importantly, values of resident-centeredness. Advisory team members display an understanding and enthusiasm about the aspirations and resident-centred philosophy. They are effective communicators, capable of offering critical feedback without being divisive or offensive, and can easily collaborate with others in working toward a shared goal. Furthermore,

they gain feedback from those they represent; embrace quality improvement and culture change initiatives; readily offer their ideas and insights; and are willing to assist with the implementation of planned action steps as appropriate.

Composition of the advisory team

Working within the range with 10-16 advisory team members, it is important to strive for balanced representation across the following areas:

Ensure a diversity of community members
- 2 leadership team members
- 2 residents
- 2 family members
- 2 direct support team members
- The remaining 2-8 positions can be team members, residents, family members, or other community members.

Ensure team member diversity across:
- Levels
- Departments
- Neighbourhoods
- Shifts

If possible, invite representation from:
- Residents' Council
- Family Council

Recruitment of advisory team members

A core group of advisory team members (2 leadership team representatives and 2 people who represent your community on the advisory team that meets at the organizational level) will identify a list of 10-16 (total) possible advisory team members using the composition criteria above.

Supply a formal invitation letter, along with detailed information about the advisory team, to distribute to prospective advisory team members.

Advisory team co-chairs

The advisory team will be co-chaired by 2 people using the following criteria:
- 1 team member
- 1 resident or family member, if possible
- 1 of these people must also be a member on the organizational advisory team

Advisory team co-chair #1 serves a 1-year term; subsequent co-chairs will serve 2-year terms thereafter. Advisory team co-chair #2 serves a 2-year term.

Commitment required of advisory team members

For the first year, 50% of the advisory team members will serve for 1-year and 50% will serve for 2-years. After the first year, all incoming advisory team members will be asked for a 2-year commitment. This way, each year, 50% of the advisory team will need to be replaced to ensure an effective membership rotation.

Attendance is required. If an advisory team member misses 2 meetings in 12 months, the co-chairs will meet with the member to discuss participation and ensure his or her continued commitment. If an advisory team member misses 4 meetings in 12 months, they give up their membership and a new advisory team member will be recruited in their place.

Frequency and duration of advisory team meetings

The advisory team will meet monthly for approximately 1-2 hours per meeting during the day or evening based on advisory team member availability. Resident and family advisory team members' participation is voluntary and unpaid. Team member advisory team members will be compensated at their regular hourly rate for their participation on the advisory team.

Organizational advisory team reporting

The advisory team co-chairs will be responsible for reporting the advisory team's activities, input and feedback to the community's leadership team, and for bringing information from the leadership team back to the advisory team.

The advisory team members who sit on the organizational level advisory team will be responsible for reporting activities, input and feedback between the community and organizational advisory teams.

Appendix 24

Action 9.1: Additional resource

Sample Invitation Letter for Advisory Team Members

Below you will find a sample invitation letter for potential advisory team members. This document features what worked well for our journey and is meant as a guide. You will need to tailor your invitation to best suit your culture change journey.

Invitation to Join Our Advisory Team

(Please put on your letterhead)
(Date)

Dear (Name),

On behalf of the leadership team at (Name of Community), I am sending this letter to formally invite you to participate as a charter member of our advisory team. I would like to take this opportunity to provide you with some information about the nature and purpose of the advisory team and what your involvement would entail should you decide to take part.

What is the purpose of the advisory team?
The purpose of the advisory team is to collaboratively promote and advance our aspirations as they pertain to our annual operational goals. Our aspirations aim to:
• (insert aspiration statements)

What will the advisory team do?
The advisory team does not have formal decision-making authority, but, instead, offers informed and wise counsel to help guide our community's leadership team in resident-centred decision-making. The advisory team is not a social committee, nor does it work on projects that are not related to our operational goals. Taking meaningful steps to thoughtfully and strategically coordinate with other committees, such as our Resident and Family Councils, the advisory team considers all views and perspectives as we work together to achieve our goals.

What will be expected of me?
The advisory team, comprised of 10-16 invited members, will meet monthly for no more than 2 hours per meeting. As a member of the advisory team, you will be asked to provide input, feedback and, at times, support related to the action steps and strategies associated with our operational goals. We are asking 50% of our charter members to serve a 1-year commitment and the other 50% to serve a 2-year commitment. Please consider which you would prefer should you accept this invitation. Attendance at monthly meetings is required.

When is the first meeting?
Our first advisory team meeting will be on (date) at (time) in (location). This meeting will be a social event designed to help members get acquainted with each other and the purpose of the advisory team, and to establish a monthly meeting schedule for the year.

Forming an effective advisory team begins with identifying some of the natural leaders within our community, people who embody the spirit, vision and values of resident-centeredness. Advisory team members are effective communicators. They gain feedback from those they represent; embrace quality improvement; readily offer their ideas and insights; and are willing to assist with planned action steps as appropriate. Our leadership team put your name forward as an ideal candidate.

The decision to participate is yours and you can choose to leave the advisory team at any time by letting 1 of the co-chairs know. If you have any questions or would like additional information to assist you in reaching a decision about participation, please contact me, (name), (title), at (number) or email (email address). Otherwise, please RSVP to (person) at (number).

Sincerely,

(Name)
(Title)

Appendix 25

Action 9.1: Additional resource

Sample Agenda for Advisory Team Meeting #1

Below you will find sample agenda and handouts for the first community advisory team meeting. This document features what worked well for our journey and is meant as a guide. You will need to tailor your meeting agenda to best suit your culture change journey.

Advisory Team - Meeting 1

Duration: 2 Hours

Agenda

1. Advisory Team Introductions
   • Introduce Your Partner (see Handout #1 on page 89)

2. Purpose of Advisory Team
   • Review advisory team terms of reference

3. Overview of Our Culture Change Journey
   • Describe as a group our culture change journey to date:
     – what 'culture change' involves;
     – what AI involves;
     – how we developed our aspiration statements;
     – how our aspirations statements guide our operational planning goals; and
     – how the advisory team can help promote and advance our goals and aspirations,
       and, ultimately, our culture change process.
   • Describe as a group how our aspirations are taking us:

From	To
Structured routines scheduled around staff needs	Flexible living and dining scheduled around individual resident needs and preferences
Hierarchical departments and silos	Cross-functional teams
Traditional activities delivered by the Recreation Department	Shared and meaningful activities for all community members
Sense of 'us and them'	Authentic relationships
One size fits all approach to service delivery	Honouring diversity
Decisions for residents	Resident empowerment

   • Discuss Traditional versus Appreciative approach to change (see Handout #2 on page 90)
   • Review Aspirations
   • Discuss Operational Planning Goals

4. Set a standing meeting time

Handout #1: Introduce Your Partner

Purpose:
The purpose of this activity is to familiarize members of the advisory team with one another.

Objectives:
- To encourage active listening skills
- To learn more about members of the advisory team
- To build comfort speaking in front of the group

Instructions:
- Please find a partner (please pick someone you do not know, or do not know well).
- Using the topics below, interview one another for about 10 minutes. Please feel free to take notes in the space provided. After both interviews, each person will introduce their partner to the group.

Find out your partner's:

Name

_____

Occupation

_____

Affiliation with the community

_____

Favourite hobbies or best way to spend the day

_____

Best moment in his or her work or life last week

_____

_____

Reason for joining the advisory team

_____

_____

_____

Handout #2: Traditional versus Appreciative Illustrations

Instructions: Please review the following 2 illustrations.
- How do these 2 approaches relate with your personal or work-related 'change' experiences?
- Which approach would you rather participate in, and why?

(c) 2001 Dave Potter

APPRECIATIVE APPROACH

VIBRANT ALIVE

SEARCH FOR WHAT WORKS · AMPLIFY WHAT GIVES LIFE

TIME FLIES

NEW POSSIBILITIES

UNEXPECTED CREATIVITY

ORGANIC, EMERGENT

MORE ALIVE!

IN-SYNC

ENERGY CAN'T BE STOPPED

WHOLE GREATER THAN SUM OF PARTS

HIGH ENERGY · E — F

HOW DOES THIS HAPPEN?!?

★ ALL (OR ALL LEVELS) INVOLVED — SOLUTIONS FROM WITHIN

★ FOCUS ON WHAT WORKS

★ SEARCH FOR ROOT CAUSES OF SUCCESS — "If you look for successes, you'll find and create more successes"

★ CREATE THE FUTURE

★ OBSTACLES TREATED AS RAMPS INTO NEW TERRITORY

(c) 2001 Dave Potter

http://appreciativeinquiry.case.edu/practice/toolsModelsPPTsDetail.cfm?coid=845

P91

Appendix 26

Action 9.1: Additional resource

Sample Agenda for Advisory Team Meeting #2

Below you will find sample agenda and handouts for the community advisory team meeting. This document features what worked well for our journey and is meant as a guide. You will need to tailor your meeting agenda to best suit your culture change journey.

Advisory Team - Meeting 2
Duration: 2 Hours

Agenda
1. Re-introduce returning advisory team members and introduce any new members
   • To warm-up, consider going around the table asking each person to introduce him- or herself and share a brief (1-2 minute) high-point story related to community life that took place over the last month.

2. Review the purpose of the advisory team (terms of reference) and your selected aspirations.
   • Note: The advisory team will be asked to provide feedback and ideas related to your selected aspirations and operational planning goals at the next meeting.

3. The primary purpose of this meeting is to collaboratively develop some guiding principles or guidelines for how the advisory team will interact and relate.
   • Review Handout #1 on page 93 (Authentic Partnerships), Handout #2 on page 96 (Live Oak Regenerative Communities Guiding Principles) and Handout #3 on page 97 (Schlegel Villages Guiding Principles).
   • Following a review and discussion, please record your agreed upon guiding principles or guidelines on flipchart paper. Consider how you will ensure that all voices are heard and valued. How will you conduct meetings and communicate in between meetings? How will you resolve differences? How does each member want to be treated and what supports are needed?
   • Have this list visible at all future advisory team meetings and refer back to it often to ensure your team is interacting and relating as desired.

4. Collaboratively name your advisory team. What would you like to call your advisory team in lieu of calling it an 'advisory team'?

5. Reminder about next meeting date and time

Handout #1: Authentic Partnerships

Reference: Dupuis, S.L., Gillies, J., Carson, J., Whyte, C., Genoe, R., Loiselle, L., & Sadler, L. (2011). Moving beyond patient and client approaches: Mobilizing authentic partnerships in dementia care. Dementia.

Guiding Principles of Authentic Partnerships	
Genuine regard for self and others	• Upholding individual rights, including the right to respect, dignity, full engagement in life, and self determination • Valuing others and feeling valued • Knowing each other and honouring individual uniqueness • Believing everyone has the potential for growth and development
Synergistic relationships	• Developing relationships that are characterised by interdependence and reciprocity • Including a diversity of community members, where all voices are equally valued • Building on the diversity of the group and incorporating the gifts of each partner
Focus on the process	• Staying flexible and responsive to change • Remaining open to learning from mistakes • Embracing creativity and non-traditional ways of doing things

Enabling Factors of Authentic Partnerships	
Connecting and committing	• Include a diverse group of individuals involved in care and support • Collectively determine goals and expectations for the partnership • Identify strengths, talents, gifts and resources • Determine how to support the inclusion of all partners
Creating a safe space	• Create a space that promotes emotional and physical comfort • Build trust to help members feel comfortable expressing their views without fear of being dismissed, judged or ridiculed • Discuss upfront how to foster strong relationships • Be attuned to indicators of discomfort or frustration • Provide a familiar environment, free of distractions, that encourages people to really be present
Valuing diverse perspectives	• Appreciate everyone's knowledge and contributions • Recognize and value different styles and types of engagement • Demonstrate that all voices count by acting on people's insights • View differences as opportunities
Establishing and maintaining open communication	• Recognize communication as a dynamic process • Provide a range of alternatives for communicating • Provide time for people to process information and share thoughts • Use accessible language • Keep all partners 'in the loop' • Regularly clarify meanings
Conducting regular reflection and dialogue	• Provide opportunities for self, and group, reflections and dialogue • Regularly ask how our approach is contributing towards building authentic partnerships • Conduct regular reflection and dialogue with those we represent

Reflection and Discussion Questions: Authentic Partnership Enablers

Connecting and Committing:
• Who is included on the advisory team, who is missing, and why? Is there a certain perspective missing from the table?
• What supports do advisory team members need in order to be meaningfully engaged?

Creating a Safe Space:
• How can we ensure the emotional and physical comfort of each advisory team member?
• How can we nurture supportive relationships with each other?

Valuing Diverse Perspectives:
- How will we demonstrate that we value all perspectives and contributions?
- How will we resolve differences of opinion?

Establishing and Maintaining Open Communication:
- How will we ensure that all advisory team members have the opportunity and time to contribute?
- What are some helpful communication strategies (verbal, non-verbal, technological, creative) we can use to enhance participation during and/or in between meetings?

Supporting Reflection and Dialogue:
- How will each advisory team member communicate and dialogue with the community members we represent?
- How can we build thoughtful reflection and quality dialogue into each meeting?

Handout #2: Example of Guiding Principles from Live Oak Regenerative Communities

Community members from Live Oak Regenerative Community developed the following set of guidelines (what they call 'action concepts') to guide their daily community meetings and overall philosophy of care and services. "Radical in their simplicity, they enable us to transcend our own conditioning and emotional responses and to be responsive to virtually any situation…" (Barkan, 2003, p. 218).

- Center program development in the in-between space where no one else has turf that they are protecting.
- Stay focused on the future (instead of dwelling on the past).
- Keep the focus on what is well within each individual and within the group.
- Always be on duty to champion the good.
- Constantly strive to be kind.
- Keep a sense of humor.
- Find a way to positively acknowledge the valuable kernel of truth at the heart of whatever a person is saying, no matter how negatively it might have been expressed.
- Welcome each person as if he or she is the most important person in the world.
- Help each person to be known to him- or herself and to others.
- Give over our blessings as if our blessings do have the power to heal and renew.
- Take each person's concerns seriously.
- Avoid taking sides.
- Avoid getting bogged down in defending a position, even if you may be right.
- Make no one bad.
- Constantly expand the middle ground so that everyone has a place in the community.
- Be a cultural translator, honoring the traditions of all participants and seeking to find common ground among them.

Handout #3: Example of Guiding Principles from Schlegel Villages

The following guiding principles were collaboratively developed by Schlegel Villages' Support Advisory Team (SAT) to guide their work together.

- Welcome each person as the most important person in the world.
- Take the time to build authentic relationships.
- Actively listen.
- Be present in the moment, go with the flow, and stay attuned to what is meaningful.
- Focus on the future instead of dwelling on the past.
- Accentuate the positive.
- Agree it is alright to respectfully disagree.
- Value and honour differences as we hold to a common mission and values.
- Be aware and encouraging of participation from all members.
- Be courageous and come out of your comfort zone.
- Believe in the power of collective wisdom.
- Focus on the process of working together and remember that culture change is a journey, and not a destination.
- Have a good time.

Appendix 27

Action 9.1: Additional resource

Sample Agenda for Advisory Team Meeting #3

Below you will find sample agenda and handouts for the third community advisory team meeting. This document features what worked well for our journey and is meant as a guide. You will need to tailor your meeting agenda to best suit your culture change journey.

Advisory Team - Meeting 3
Duration: 2 Hours

Agenda
(*Please provide a handout or display a list of the community's selected aspirations.)

1. Re-introduce returning advisory team members and introduce of any new members.
   - To warm-up, please introduce yourself and share a brief (1-2 minute) high-point story related to 1 of our community's aspirations that took place over the last month.

2. Review the purpose of the advisory team.

3. Review the advisory team's new name.

4. Review and post the advisory team's 'guiding principles' (guidelines about how the advisory team will interact and relate) which were developed at the last meeting.

5. Any further suggestions or feedback regarding the guiding principles?

6. Review the community's selected aspirations.

7. The primary purpose of this meeting is to have a good discussion regarding 1 of the selected aspirations.
   - As a group, select an aspiration to discuss. The other aspirations will be discussed at our next 2 (or 3) meetings. Describe briefly our community's operational planning goals that are directly related to this aspiration.
   - See Handout #1 on page 99 (Aspiration *Learning Circle*).
   - As a group, discuss how our input and feedback will be shared with our community's leadership team.

8. Reminder about next meeting date and time

Handout #1: Aspiration Learning Circle

Before we begin, let us read these instructions, assign roles and clarify questions.

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 (1 question 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 the following page.
- 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.

Are there any questions before we begin?

Please select 1 of our community's aspirations to discuss:

Facilitator:

_____

Note-taker:

_____

Names of Participants:

_____

Discussion Questions

Round 1: What is our community currently doing to thoughtfully and strategically promote this aspiration? Or, what progress have you observed regarding the promotion of this aspiration within our community?

_____

_____

_____

_____

_____

Round 2: What is 1 suggestion, idea or resource that would support the realization of this aspiration within our community?

_____

_____

_____

_____

_____

Appendix 28

Action 9.2: Facilitator guide

Facilitator Guide for Aspiration Learning Circles

The following guide will help you facilitate the aspiration *Learning Circles*. For a refresher on how *Learning Circles* work, please see Appendix 7. This document features what worked well for our journey and is meant as a guide. You will need to tailor your *Learning Circles* to best suit your culture change journey.

Aspiration Learning Circles:

- Please schedule 3 aspiration *Learning Circles* (1 for each of your community's aspirations) over the course of 1 day during the Roadshow: 1 in the morning, 1 in the afternoon, and 1 in the evening. This is an opportunity for your community to collaboratively advance your community's selected aspirations.
- Please adhere to the *Learning Circle* instructions and format. *Learning Circles* are not open, roundtable discussions. Instead, they are very structured, systematic, and specifically designed to give everyone an opportunity to speak and be heard.
- The size of a *Learning Circle* is limited to 12 participants. If you have more than 12 community members show up to participate, you will want to hold simultaneous *Learning Circles*, all focused on the same aspiration. Therefore, line up at least 3 or 4 possible facilitators and locations for each aspiration *Learning Circle* time slot.
- Ask the following discussion questions (1 question per time around the circle), and record key highlights using the worksheet on page 102:
  - What is 1 approach, process or activity that our community has used to support the realization of this aspiration that has worked well?
  - What is 1 approach, process or activity that our community has used to support the realization of this aspiration that has not worked well and what did we learn as a result?
  - What is 1 suggestion, idea or resource that would support the realization of this aspiration within our community?

Aspiration Learning Circle Worksheet

Aspiration:

_____

Facilitator:

_____

Note-taker:

_____

Names of Participants:

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Discussion Questions

1. What is 1 approach, process or activity that our community has used to support the realization of this aspiration that has worked well?

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2. What is 1 approach, process or activity that our community has used to support the realization of this aspiration that has not worked well and what did we learn as a result?

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3. What is 1 suggestion, idea or resource that would support the realization of this aspiration within our community?

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Appendix 29

Action 9.2: Facilitator guide

Facilitator Guide for Conversation Cafés

Below you will find instructions and a handout regarding the conversation cafés. This document features what worked well for our journey and is meant as a guide. You will need to tailor your conversation cafés to best suit your culture change journey.

Conversation Cafés Facilitation Information

Set-up:
- Facilitators should arrive at a time so that those on the night shift can participate and have their voices heard, and stay until the afternoon shift also has this opportunity.
- Set up 3 or 4 tables (1 facilitator per table) in the same area, but as far apart from each other as possible to help minimize noise and aid in quality communication (it can get quite loud with so many people speaking in a room at one time).
- Set up the promotional posters advertising the conversation café in a highly visible area to attract people and give them something to review while waiting for an available facilitator.
- Each facilitator should have the following:
    - At least 20 blank copies of 'Individual Response Sheet' (pages 105);
    - A list of the aspirations;
    - A shortened description of each aspiration with examples;
    - A binder to store completed feedback forms; and
    - Copies of 'Facilitator Team Summary' sheet (pages 107).

During the conversation café:
- Participants will be asked to sit at a table with 1 of the facilitators to explore 1 or all of the aspirations they are working on in their community by responding to the questions provided on the 'Response Sheet'. If a participant only has 10 minutes, then consider discussing only 1 aspiration – their choice. If they have 30 or 45 minutes, then they may wish to answer questions for a few aspirations.
- Remember, this is an opportunity to both gather and share information. Ask follow-up questions to help participants dig deeper, and focus on the quality of information provided, not the quantity. Clarify and record responses on the 'Response Sheet'. Ask respondents if you accurately captured their thoughts.

Analyzing and reporting interview findings:
- At the conclusion of the café, all facilitators should meet as a facilitation team to complete a 'Facilitation Team Summary' for each aspiration. Please agree on the content as a team. This will probably take about 1 hour. Then meet with the community leadership team for a debriefing and provide them with a photocopy of the summaries.

Conversation Café Individual Response Sheet

Community:
Facilitator's Initials (if applicable):

Please indicate whose responses are reflected on this form:
• Resident Number:
• Family member Number:
• Team member Number:

Department(s):

_____

1. What aspirations did your community work on this year?

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2. Which 1 would you like to discuss?

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3. In your own words, what does this aspiration mean to you? What does [aspiration] look like to you?

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4. What are some of the ways in which this aspiration is currently reflected in your community?

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5. What is one idea that could potentially advance this aspiration in your community over the course of the next year?

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6. Of all the aspirations, which do you feel would be the most important for your community to focus on in the coming year, and why?

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7. Do you have any other feedback regarding your experience in the community that you'd like to share?

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Conversation Café Facilitation Team Summary

(Facilitators: Please complete this form as a group for each aspiration statement discussed, and provide a copy to the community leadership team during your debriefing)

Conversation Café Location:

Facilitators:

Please indicate the approximate number of respondents you interviewed regarding this topic:

Residents: Family members: Team members:

Aspiration Statement:

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1. Did anything surprise you about how community members described their interpretation of this aspiration? If so, what surprised you?

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2. Which aspects of this aspiration seemed the most important to community members?

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3. What were some of the commonly mentioned ways in which this aspiration is currently reflected in the community?

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4. What were some of the commonly mentioned ideas community members had for how to advance this aspiration? If there were no 'common' ideas, then what were some of the most inspiring ideas?

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5. When asked to choose an aspiration for the community to focus on in the coming year, what was the most common response? What factors do you sense contribute to this response?

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6. Other feedback provided:

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Appendix 30

Action 9.2: Additional resource

Sample Reflection Questions for Reflection Interviews

This document features sample reflection questions that worked well for our reflection interviews and is meant as a guide. You will need to tailor your questions to best suit your culture change journey.

Possible Process-Oriented Reflection Questions (for advisory team members)
(adapted from Dupuis, et al., 2012)

Connecting and Committing
- What stakeholder groups (e.g., residents, family members, direct support team members, leadership team members, etc.) were represented on the advisory team (either organization-level or community-level) and what impact do you think that had on our culture change journey?
- What stakeholder groups, if any, were missing? If any were missing, why do you think they were missing and what impact do you think that had on our culture change journey?
- Please tell me about your experience as a member of the advisory team and describe the extent to which you were meaningfully engaged. What could we have done to better support your participation?
- How committed were advisory team members to our culture change journey? How did you know if they were committed or not? What role, if any, does commitment play in the culture change process?

Creating a Safe Space
- How would you describe your level of comfort at advisory team meetings? What specific things were done to make you feel comfortable/safe/included? What further efforts, if any, would have been helpful?
- Did you develop any relationships with other members of the advisory team? If so, please describe how those relationships developed and the role they played in your overall experience.
- What further efforts, if any, would have helped us develop and nurture supportive relationships on the advisory team?

Valuing Diverse Perspectives

- In what ways were you supported in sharing your perspectives and ideas at advisory team meetings and throughout our culture change process?
- What further efforts, if any, would have helped you feel that your ideas, perspectives and contributions were valued?
- How did we work to resolve differences of opinion at advisory team meetings? What further efforts, if any, would have been helpful?
- How did hearing diverse perspectives at advisory team meetings influence our culture change process?

Establishing and Maintaining Open Communication

- Do you feel that you were given the opportunity and time to contribute at advisory team meetings? What further efforts, if any, would have been helpful?
- How would you describe our communication on the advisory team?
- How was information shared with advisory team members throughout our culture change process?
- What further communication strategies, if any, would have been helpful either at or between advisory team meetings?

Conduct Regular Reflection and Dialogue

- At advisory team meetings, how did we critically reflect on our culture change process in terms of what was working well and what was not working well and what new actions to take?
- What opportunities were you given to provide your reflections on our culture change process?
- What role do you think these reflections played in our culture change journey?
- Did we build regular reflection and dialogue into each advisory team meeting? If so, how effective were our efforts? What further efforts would have been helpful?

Possible Impact-Oriented Reflection Questions (for advisory team members and community members) (adapted from Kemmis & McTaggart, 1988)

- What would you say if someone asked to you tell them the story of our culture change journey?
- What are a few of your favourite stories from our culture change journey and what lessons can we take from those stories?
- What, if anything, has changed as a result of our culture change efforts? What do you think helped influence or support these changes?
- What do you think is the most significant change that has resulted from our culture change journey?
- Tell me about one of the aspirations your community has worked actively to promote. What success has been achieved? What further changes do you think are necessary to promote this aspiration and what would help enable those changes?
- What were some of the challenges encountered on our culture change journey? Why do you think those challenges exist?
- What should our next steps be on our culture change journey?

- What advice or 'lessons learned' would you share with another organization wishing to embark on a culture change journey?
- What are three words you would use to describe our culture change journey?
- Which aspiration do you feel we've made the most/least progress on as an organization? What do you think has influenced that outcome?
- What practices, if any, improved as a result of our culture change process? How did they improve? What, if anything, are we 'doing' in a new or different way?
- What disagreements currently exist in the use of certain practices among people in your community, or among people in the organization? (For example, perhaps some team members support residents in waking up when they want to wake up, while others believe all residents should wake-up in time for breakfast at 8 AM.)
- Has your work/living environment changed as a result of our culture change process? If so, how has it changed?
- What changes, if any, have you noticed in relation to language, words or phrases as a result of our culture change process? What are we 'saying' that is new or different?
- What disagreements currently exist in the use of words and language among people in your community, or among people in the organization?
- What changes, if any, have been made to our organizational structure to help us achieve our culture change goals and aspirations? How are we 'relating' to each other differently, if at all?
- Have you worked to personally change any of your language, practices or social relationships as a result of our culture change journey? If so, could you please offer a description? Are there any areas in which you would like to continue making improvements?
- What contradictions currently exist, if any, between the things we say and the things we do? In other words, are we talking the talk and walking the walk?

Congratulations on completing the guidebook.
We hope you've enjoyed the journey!