



Working Together to Put Living First

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



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Acknowledgements

Thank you to Schlegel Villages for partnering with us on this culture change journey. The champions who were instrumental in this success story are too many to mention, but it is important to acknowledge that they came from all levels of the organization: residents, family members, direct support team members, managers and leaders in each Village, the Support Office team led by Chief Operating Officer Bob Kallonen, and the Schlegel family, owners of Schlegel Villages. It is the collective and collaborative efforts of all of these people that underpin the many successes already realized on this continuing journey to 'put living first'.

Illustrations by Liisa Sorsa (ThinkLink Graphics) 2014.

This guidebook was produced in part with funding from the Government of Ontario.



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In this guidebook, we use some words in very specific ways. Please keep these meanings in mind as you read through this guidebook.

Appreciative Inquiry

Appreciative Inquiry (AI) is an organizational development strategy that focuses on the cooperative search for the best in people, their organizations, and the world around them. In contrast to deficits-based change strategies that focus on problems, AI involves the systematic discovery of what gives a system or organization life.

Aspiration Statements

Aspiration statements are collaboratively written statements about an organization's future state. Written in the present tense, they are used to guide the setting of operational goals and objectives for the future.

Collaborative Leadership

Identified as the most complex culture change practice, collaborative leadership lays the foundation for creating authentic homes and strong communities. In collaborative leadership, all organization members are viewed as knowledgeable contributors and collaborators, but designated leaders hold the authority and accountability to make final decisions. Collaborative leadership means regularly including residents, family members and direct support team members in the decision-making process. At Schlegel Villages, collaborative leadership is facilitated through Village Advisory Teams (VAT) and a Support Advisory Team (SAT), in addition to other vehicles and processes for collaboration.

Community

Throughout this guidebook we use the term 'community' to refer to long-term care (LTC) and retirement living environments. Community members are those who live and work there and their families. Each Schlegel Village is a community as well, but we refer to them as 'villages' to distinguish the Schlegel Villages' story – which is the focus of this guidebook – from tips, tools, and insights for other communities embarking on a culture change journey.

Culture Change

Culture change is the common name given to the social movement to transform LTC and retirement living towards resident-centred and resident-directed values and practices, where the voices of older adults and those working with them are considered and respected. Core resident-centred values include choice, dignity, respect, self-determination and purposeful living. In this guidebook, we define culture change as a shift from an institutional model of care to a social model of living: a shift in focus from providing care to supporting living. We still must provide excellent health care, but without making it the central focus. Culture change calls us to put living first.

Pioneer Network

Founded in 1997, this not-for-profit organization based in the United States advocates for, and facilitates culture change in LTC homes and across the continuum of aging services. It provides guidance and resources to policy makers, residents, providers, researchers, educators, funders, advocates, and community partners. It organizes an annual culture change conference each summer. To learn more about the Pioneer Network, please visit: www.pioneernetwork.net.

Schlegel Villages

Schlegel Villages is a family owned and operated business providing LTC and a range of retirement living options in 14 locations across southern Ontario. We refer to these communities as 'villages' and to their staff as 'team members'. Each village has a general manager (GM) and a leadership team. Schlegel Villages' support office team, led by a Chief Operating Officer, provides support to each village. The LTC component of each village is traditional in physical design, with residents grouped into 32-person 'neighbourhoods'. To learn more about Schlegel Villages, please visit: www.schlegelvillages.com.

Schlegel-University of Waterloo Research Institute for Aging

The RIA is a non-profit organization that aims to enhance the quality of life and care of older adults through partnerships in research, education, and practice. RIA partners with Schlegel Villages to develop and test innovations, and then shares the findings to benefit older adults everywhere. To learn more about the RIA, please visit: www.the-ria.ca.

Team Members

Throughout this guidebook, we refer to those who provide care and/or support to residents in LTC and retirement living communities as 'team members' to move away from the institutional connotations of 'staff' or 'employees'.

Village and Neighbourhood

In this guidebook, we use the term 'village' or 'villages' when referring to one or more of the communities owned and operated by Schlegel Villages. We refer to them as villages rather than communities to distinguish the Schlegel Villages story – the focus of this guidebook – from tips, tools and insights for other communities embarking on a culture change journey. Each village is divided into smaller sections known as 'neighbourhoods' to create a more intimate scale of living for residents. Each neighbourhood has dedicated team members assigned to it.





In Canada, we envision a culture of aging where:

- the personhood of each individual is honoured;
- each person is the primary authority of his or her life and personal choices are respected and supported;
- the focus is on living life to the fullest;
- accessible and enabling environments support continued engagement and connections in community;
- the body, mind and spirit of each person are nourished;
- close relationships and authentic partnerships involving collaborative decision-making are at the core of compassionate communities; and
- all care partners have the knowledge and information, skills, resources, authority and accountability to provide respectful, flexible, and life-affirming care and support.

*(Walk with Me, 2014;
www.the-ria.ca/walkwithme)*

Introduction and Purpose

There is growing recognition that deep changes are needed across the continuum of aging services, but more specifically within long-term care (LTC), as we progress from institutional models of care to more humane and life-affirming social models of living (Fagan, 2003). This positive revolution is known as the ‘culture change’ movement.

At the inaugural Canadian culture change conference, Walk with Me: Changing the Culture of Aging in Canada (2014), culture change was defined as ‘an ongoing, holistic journey that includes re-examining values, beliefs, attitudes, language, practices and policies and exploring the full range of efforts needed to transform the culture into a community where everyone thrives.’



To learn more about Walk with Me, visit www.the-ria.ca/walkwithme.

In this guidebook, you will learn how one LTC and retirement living organization in Ontario, Canada (Schlegel Villages), partnered with the Schlegel-University of Waterloo Research Institute for Aging (RIA), and doctoral candidate, Jennifer Carson, to embark on a unique culture change journey. Specifically, this team explored a strengths-based approach to culture change guided by collaborative leadership and Appreciative Inquiry (AI). You will learn more about collaborative leadership and AI in the Steps that follow in this guidebook. This initiative was called ‘Working Together to Put Living First’.

Culture change is a national priority


There are more than 18,000 LTC homes across North America, and the overwhelming majority 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. Because the hierarchical structure of the institutional model creates silos of regimented service delivery, those most directly involved in care are often restricted in their ability to participate in decision making. As a result, residents are often forced to comply with organizational routines at the expense of their own self-determined interests.

The need for change is becoming increasingly evident, and a number of national organizations are calling for transformation in the way we provide care and support to Canada’s older adults (Canadian Healthcare Association, 2009; Alzheimer Society of Canada, 2011; Canadian Life and Health Insurance Association,



2014). The Canadian Healthcare Association (CHA) identified culture change as a ‘national priority’ and spoke to the lack of progress being made:

Unfortunately, the institutional model is still evident today though few [communities] admit it. Mission, vision and values statements speak about individualized approaches to care and empowering stakeholders, but when you strip away the language and move past the colourful drapes, pets, and carefully-placed personal belongings, little has changed... (CHA, 2009, p. 24)


Despite this national push to change the current culture, why have so few communities achieved the vision for more ideal living and working conditions? One reason is because culture change is extremely hard work; it takes place within complex human systems. According to the CHA (2009), “Creating a home is a journey, not a destination. To prescribe ways to create a home could strip away one of the greatest benefits of the quest: to stimulate curiosity and transform the home into a learning organization” (p. 25).



According to Ibarra and Hansen (2011), in collaborative leadership, all organization members are viewed as knowledgeable contributors and collaborators, but designated leaders hold the authority and accountability to make final decisions. You will learn more about collaborative leadership in Step 1.

Embarking on this journey requires people to change the way they speak, act, and relate to each other. However, ‘changing people’ should never be the focus of culture change. People should never be treated as the objects of someone else’s plans for change. Rather, people should always be treated as the experts of their own lived experience who are able to determine their own roles and goals in the culture change process. As such, culture change should honour the uniqueness of each organization, each LTC home, and each person within each LTC home. It cannot be approached with a ‘one-size-fits-all’ mentality – it is that type of thinking that created the current institutional culture in the first place.



To that end, the culture change movement needs to be supported by leaders who understand the unique contributions that each member of the organization brings to the team. Culture change requires collaborative leadership. One way that communities can articulate shared goals and understand the importance of the collaborative process is through storytelling.

The importance of storytelling

During an interview, Dr. William ‘Bill’ Thomas, one of the most prominent and influential leaders of the culture change movement, was asked, “What kinds of skills or competencies are necessary to drive change in a [community] serving elders?” (Keane, 2004, p. 45). In light of today’s orientation toward evidence-based practices and our ever-increasing reliance on experts and technology, his answer may come as a bit of a surprise. Dr. Thomas said:

Number one is storytelling ability. By this I don’t mean ‘once upon a time.’ The stories I’m talking about encapsulate lessons into digestible, memorable chunks. Great political leaders do this – talk about a particular policy or project in terms of a great journey, with all the obstacles and rewards that lie ahead. The senior-care leader has to lay out the culture-change effort in this manner. (Keane, 2004, p. 45)

Storytelling is the most important skill or competency to drive culture change. Next to first-hand experience, story is the best teacher. A story has the ability to illuminate meaning much more than facts or figures, but there is more. Stories unite and define communities and create culture. As professional storyteller Annette Simmons teaches:

... through the words, gestures, tone, and rhythm of story you can captivate an audience of skeptical, resistant, nay-sayers and simultaneously construct a believable picture for your ideas and goals. In this hyper-competitive, techno-centric, and results-oriented environment it is easy to forget that all organizations are social systems and that work is personal – learning to tap into the personal element through story gives you a key to the social system. Alignment improves, problems get solved, group decisions are easier to make, and trust develops in ways and in places you might never have thought possible. (Simmons, 2006)

With the power of stories in mind, each section of this guidebook shares the story of our collaborative culture change journey as a way of setting the stage for the learning opportunities that follow. As you read our story, you may want to think about some strategies that you could use to document and share your own culture change story as it unfolds.

Using this guidebook

This guidebook is organized into 9 Steps, based loosely on the cycles of AI that guided our process. Each Step includes a number of Actions and many include Appendices that contain practical tools and resources that you can use to guide your own journey.

We will describe how a small group of ‘learning partners’ came together through shared concerns and values, and then engaged a large group of team members in a collective reflection and critique of the organization’s culture. This resulted in a collaborative decision to embark on a culture change journey.

Next, you will learn how Schlegel Villages gradually strengthened its capacity for collaboration, developing meaningful opportunities and roles for village members to engage in the culture change process. The most effective, sustainable, and rewarding culture change journeys include all community members in the process, as co-owners of the change strategy, not merely as beneficiaries of improvements. Inclusion is the beating heart of culture change.

Culture change does not happen overnight. In this guidebook, we describe the timeline of our journey, not because it was the right or best timeline, but simply as a part of our story. In fact, some village members believe parts of our story may have unfolded too fast, especially when collaborative decisions were made about our journey at an organizational level instead of at the village level. We will explain how decisions were made and the impact we think our chosen leadership style or approach had on our culture change journey.

This guidebook does not offer a simple template or recipe for change. Rather, we encourage your organization to embark on a collaborative, process-oriented journey that is guided by shared values and supported by your community’s unique strengths. A truly collaborative culture change journey seeks to honour, celebrate, and build on this quality of uniqueness. As we share our story, we hope you will find plenty of inspiration, insights and practical strategies that can be tailored to support your community as you begin (or continue) your unique journey to co-create a better future within LTC, retirement living and across the culture of aging.





Step 1: Build a Foundation

Clarify organizational values, reflect on readiness for culture change, and commit to embarking on a collaborative culture change journey.

- Action 1.1:** Identify a small group of learning partners
- Action 1.2:** Learn about culture change from others
- Action 1.3:** Clarify organizational values and strengths
- Action 1.4:** Reflect on organizational readiness for culture change
- Action 1.5:** Learn about the importance of collaboration

Resource materials for Step 1 are provided in Appendices 1 – 4.



Step

1

Build a Foundation

Introduction

At its most basic level, the journey to change the culture of aging has two core values: to honour the individuality of each person, and to create community. Culture change pioneer, Barry Barkan (2014), explains, “Community begins with two people”, and so does culture change; at the very least two. The culture change journey is not a solo trek. Some people try to transform their community single-handedly; like the hero who swoops in to save the day. While such efforts may result in operational, environmental and programmatic modifications (perhaps even improvements), this type of change is not really a culture change. Using a top-down approach to implement one person’s vision of a transformed culture actually serves to perpetuate and reinforce the current dominant, expert-driven, hierarchical culture we are striving to flatten.

The quest to change the culture of LTC requires us to break free of an over-reliance on experts and top-down decision-making. In order to change the culture of LTC, we must explore and build upon the qualities of open communication and collaboration by seeking alternative sources of knowledge from those that have typically been excluded or ignored. All people and “all groups have a right to speak for themselves, in their own voice, and to have that voice accepted as authentic and legitimate” (Harvey, 1999, p. 310). By honouring each person’s experiences and knowledge, all those involved within a given context can have ownership of agreed-upon improvements and changes, as opposed to ‘buy-in’ to some ‘ideal’ driven by a top-down process.

One of the Pioneer Network’s core values is that “[relationships are] the fundamental building block of a transformed culture” (Fagan, 2003, p. 131). By embracing this value, relationships and community are seen as more than outcomes: they are mobilizers of culture change. Culture change is not about implementing a single vision of a new culture, but co-creating the culture together. We encourage organizations to build coalitions based on authentic relationships, always remembering that without collaboration, there is no culture change.

Often, partnerships and collaborations start small and develop over time, both in terms of the number of collaborators and the scope of the work itself. The scope of the work increases as the group expands its activities and membership, progressively including and engaging more and more people as agents of change.



The developing process of a culture change journey is like the growth rings of an oak tree which support and strengthen a common centre comprised of shared values. The process starts small and grows outward.

Think of it like this: picture a large oak tree and then imagine looking at a cross-section of its thick trunk. Say it is a very old tree and there are hundreds of growth rings. The developing process of a culture change journey is like the growth rings of an oak tree which support and

strengthen a common centre comprised of shared values. At Schlegel Villages, we started small and grew outward. Our journey began with a few senior leaders, the centre-most growth ring, who came together around a shared concern and shared values. Then, over the years, with each new partner in the process, our growth rings have spread outward, creating a core of immeasurable strength.



This guidebook describes nearly 5 years of our ongoing culture change journey.

During this time, Schlegel Villages grew from:

- 9 villages and 2,000 residents in 2009
- 11 villages and 2,500 residents in 2011
- 13 villages and 3,000 residents in 2013

As you work your way through this guidebook, you will learn how this notion of ‘starting small and growing outward’ has been reflected in our culture change journey. We will describe how our collaborations grew from a few senior leaders, to a group called the Support Advisory Team (SAT) (with representatives from across the organization), that now links into 14 Village Advisory Teams (VATs), each with resident, family member, and team member representatives. By starting small and gradually widening our efforts, we were able

to strengthen our capacity for action and change as we developed ways to meaningfully engage others and build on previous learnings and achievements.

Drawing on our experiences, Step 1 explores some actions you can take to clarify your organizational values and reflect on your readiness for culture change.



Action 1.1: Identify a small group of learning partners

In the summer of 2009, Susan Brown (Research Coordinator, RIA) introduced University of Waterloo (UW) doctoral student, Jennifer Carson, to Schlegel Villages’ Chief Operating Officer, Bob Kallonen. Jennifer’s previous culture change experience (including over 20 years of serving LTC and retirement communities in the United States) complemented Bob’s belief that, despite Schlegel Villages’ quality programs, sophisticated design features and reputation for excellence, there were more opportunities for the organization to move away from a traditional, medical model of service delivery to one that was more social, relational, and, ultimately, empowering.



Susan
Bob



Jennifer

This guidebook is based on Jennifer’s doctoral research entitled, *Working Together to Put Living First: A Culture Change Process in a Long-Term Care and Retirement Living Organization Guided by Critical Participatory Action Research*. Jennifer conducted her research as a part-time student (Aging, Health and Well-Being Program, Recreation and Leisure Studies, University of Waterloo) while working full-time as Schlegel Villages’ director of program development and education. Her research engaged members of Schlegel Villages in seven cycles of critical participatory action research (CPAR) between 2009 and 2014. This guidebook draws from Cycles 2 – 5 of this larger initiative, which won an Excellence in Ageing Services Award from the International Association of Homes and Services for the Ageing (IAHSA). Jennifer’s dissertation can be found in the University of Waterloo’s electronic theses and dissertations collection (www.lib.uwaterloo.ca/theses/).

After a series of conversations, Bob enlisted Jennifer's help to guide a collaborative, organization-wide culture change initiative. Before moving forward, both Bob and Jennifer agreed this initiative could only happen if other members of the organization (including owners, senior leaders, residents, family members, and team members) shared Bob's belief that there were opportunities for the organization to change.



Josie

Aligned in values and purpose, Bob and Jennifer agreed to explore the possibilities and invited Josie d'Avernas (Vice President, RIA) to join them. The team of three became 'learning partners'. Barry Barkan (2002) explains:



We should have at least one long-term partner in learning, a learning partner, with whom we have an agreement to share our thoughts, our experiences, and the changes we inevitably will go through. Our learning buddies can be people very different from ourselves in background, education, and experience or they can be people very much like ourselves. The more long-lived our relationship with our learning buddies, the deeper the experience and the more valuable the relation is to our path. The more the partner relationship is founded on intellectual rigor, the courage to share intimately, and mutual support and encouragement, the more beneficial the relationship will be to each partner. (p. 4)

Beginning in 2009 and continuing over the course of 5 years, Bob, Jennifer and Josie met regularly for open and honest discussions about how to keep Schlegel Villages' culture change work collaborative and grounded in practical and lived realities, using their respective positions to create opportunities for village member inclusion and engagement in decision making regarding all aspects of the journey.



Reflection Questions

- 1) Who will you invite as your initial learning partner(s)?
- 2) How will you invite them to join you on this journey?
- 3) What strengths does each individual bring to the partnership?



Action 1.2: Learn about culture change from others

While this guidebook presents some ideas and actions for embarking on a collaborative culture change journey, additional resources may also be valuable. Remember, if you take a truly collaborative approach to culture change, then it is not about implementing a single idea or vision of a transformed culture. It is about co-creating a better future together, and each organization's experience and outcomes will be different. By reviewing different resources and sharing your learnings with your partners, you will begin to develop a common language, powerful questions, shared values, and new understandings together.



Reflection Questions

- 1) What culture change resources will you explore?
- 2) Are there any communities engaged in culture change among your network of colleagues that would host you for a learning-focused site visit?

After learning some more about culture change from others, work with your learning partners to respond to the next set of questions:



Reflection Questions

- 1) What does 'culture change' mean to you?
- 2) How will you describe/explain culture change to residents, family members, and/or team members? How can they contribute to a shared definition/understanding?
- 3) Which culture change values resonate with you? The Canadian culture change values are listed on page 7 to help start your discussion.
- 4) What barriers and enablers (challenges and successes) have other communities experienced in relation to culture change?
- 5) How have other communities engaged their members in the culture change process?
- 6) What are some key lessons that you can take from other communities?
- 7) What questions or concerns would you like to discuss further?

In the next section, Jennifer shares a story about how our initial learning partners began to develop a common language, powerful questions, shared values, and new understandings, and then communicated some of their early ideas and intentions to others, engaging them in the beginnings of our culture change process.



Please see [Appendix 1](#) for a list of additional resources.



'How We Got on the Same Page'

Written by Jennifer Carson

Shortly after meeting Bob, during one of our marathon chats at a local coffee shop, I gave him copies of two journal articles that reflected my culture change values and orientation. The first article was Rose Marie Fagan's (2003) *Pioneer Network: Changing the Culture of Aging in America*, and the second was Rosalie Kane and colleagues' (2007) *Resident Outcomes in Small-House Nursing Homes: A Longitudinal Evaluation of the Initial Green House Program*.

Fagan's article describes the history of the culture change movement in the United States and how a core set of values and principles were collaboratively developed by some of its 'pioneers'. She offers examples of practices that express Pioneer values and principles, and further describes some of the positive impacts and outcomes within communities that have embarked on a culture change journey. This influential article concludes with some powerful advice for 'Getting Started' and 'Becoming Champions of Change'. The following excerpt, in particular, combined with lessons-learned from my own culture change experiences, greatly influenced the way I approached my relationship with Schlegel Villages and the journey that would soon unfold:

Culture change begins within ourselves. "We must become the change we want to see in the world" (Ghandi, 1869-1948). The process in LTC, for example, begins with education about culture change values, the change process and journeys of others on the path. The work is about learning to align an organization's practices with the Pioneer values and principles. Organization leaders must own the vision and be totally committed. This cannot be only a top-down approach. Everyone must be involved in the process.... residents, staff,

family members, and leadership together must assess daily practices to be certain that practice expresses values. This requires looking at practice in every aspect of the organization including: admission, hiring, staff orientation, food service, bathing, aging in place, staff assignments, resident schedules, and death and dying... Culture is an organic, on-going process that has the potential for change, growth, and development. There is no 'cookie cutter' way to turn an organization around. Each facility must develop its own non-prescriptive approach that recognizes the existing culture and its implications for administrators, staff, residents, and families.

Kane's article describes a two-year study comparing resident reported outcomes of those residing within GREEN HOUSES (i.e., a small-house nursing home model) (www.thegreenhouseproject.org) with those living at two more traditional sites. This article describes Dr. Bill Thomas' vision of transformed culture as well as some of the evidence regarding the merits of culture change in terms of quality of care, resident functioning, and quality of life.

Bob already knew quite a bit about the GREEN HOUSE Project, but was thankful for the opportunity to review Kane's findings, noting that empirical evidence often helps others to appreciate the importance and value of culture change.

While Bob valued Kane's study, he was so captivated and inspired by the revolutionary thinking of Fagan and her colleagues at the Pioneer Network that he read her article aloud, word for word, to James Schlegel, Schlegel Villages' President, during a drive from Kitchener to Windsor, Ontario. James recalls:

*... it was probably four and a half years ago that Bob and I were driving down to Windsor and on the way back we pulled out the Pioneer Network article... We spent the better part of the three-hour trip back from Windsor talking about how to fundamentally change this notion of aging being something that we dread, something that has limited value and purpose in society. How do we get away from the notion that aging and going into a retirement home or a nursing home is something to be avoided at all costs and something to be dreaded, and turn it into something that is viewed as another phase of life to be anticipated and, at some level, celebrated? So Bob and I had a great conversation around how we change senior living to be something that people look forward to... and how to create a culture that values our elders as compared to marginalizing them. That was an important milestone in the journey for me, and then things moved from there.
(Interview, March 31, 2014)*

Following his discussion with James, in which their shared concerns and values were evident, Bob shared Fagan's article with members of the Support Office team and all of Schlegel Villages' General Managers (GMs). Once everyone had an opportunity to read and reflect on Fagan's article, Bob held a meeting (August 2009) to see how it resonated with them. The perceived need for change was unanimous and their alignment in values was clear. Bob emailed me:

*I've shared the Pioneer Network article with James Schlegel, our Support Office team and all of our GMs. I have everyone's commitment that this is the journey we want to take. I'd like to take this to another level (all of the department heads and a selected group of 32 direct support team members, and our support office consultants and managers) at our operational planning meeting scheduled for Sept 30, Oct 1 and Oct 2. Interested in helping?
(Email dated August 24, 2009)*



The Pioneer Network's values and principles are:

- Know each person
- Each person can and does make a difference
- Relationship is the fundamental building block of a transformed culture
- Respond to spirit, as well as mind and body
- Risk taking is a normal part of life
- Put person before task
- All elders are entitled to self-determination wherever they live
- Community is the antidote to institutionalization
- Do unto others as you would have them do unto you
- Promote the growth and development of all
- Shape and use the potential of the environment in all its aspects: physical, organizational, psycho/social/spiritual
- Practice self-examination, searching for new creativity and opportunities for doing better
- Recognize that culture change and transformation are not destinations but a journey, always a work in progress

(www.pioneernetwork.net)

With the strong support garnered from Schlegel Villages' leadership team, it was now time to plan how to engage team members in discussing and reflecting on the organization's current culture and the possibilities of culture change at Schlegel Villages' annual operational planning retreat. This is a 3-day event attended by the leadership team of each village, the support office team, and a few direct support team members, residents, and family members. In preparation for this exciting opportunity, Bob, Josie and Jennifer started meeting weekly to discuss possible ways to engage village members in critical reflection and consciousness-raising about aspects of the current culture that were still entrenched in an institutional, medical model of care, and also some possible ways to engage them in appreciative thinking about the organizational values and strengths that would support our culture change journey.



Action 1.3: Clarify organizational values and strengths

There is something that 'works' in every organization, and we can build on what works as a positive foundation for change. As Bob, Jennifer, and Josie prepared for the 2009 operational planning retreat, they identified several key attributes of Schlegel Villages' organizational culture that they believed would make our culture change journey possible, effective and sustainable. These attributes are defined in Exhibit 1.3A.



Exhibit 1.3A: Schlegel Villages' values and strengths that support culture change



<i>Value/Strength</i>	<i>Description</i>
Schlegel Villages is driven by its mission, vision and values	Organizational practices and decisions at all levels align with the organization's mission, vision and values
Schlegel Villages promotes a resident-centred approach	Organizational practices enhance the ability of each resident to live freely and fully, as desired
Schlegel Villages is built on strong and trusting relationships	Village members enjoy healthy relationships based on mutual respect
Schlegel Villages supports village member involvement in decision making	Meaningful opportunities exist for residents, families, and team members to interact, build relationships and participate in decision making (formal, informal, direct, and indirect)
Schlegel Villages' senior leaders' values are aligned with culture change values	The organization's owners and senior leaders have values that are aligned with culture change values
Schlegel Villages' leaders embrace a servicing leadership approach	Leaders embody a participatory style of leadership; work collaboratively; put the needs of their team first; and help develop the leadership capacity in each member of the team
Schlegel Villages demonstrates a strong organizational capacity for learning, research and innovation	Learning, research, and innovation are well-supported priorities within the organization

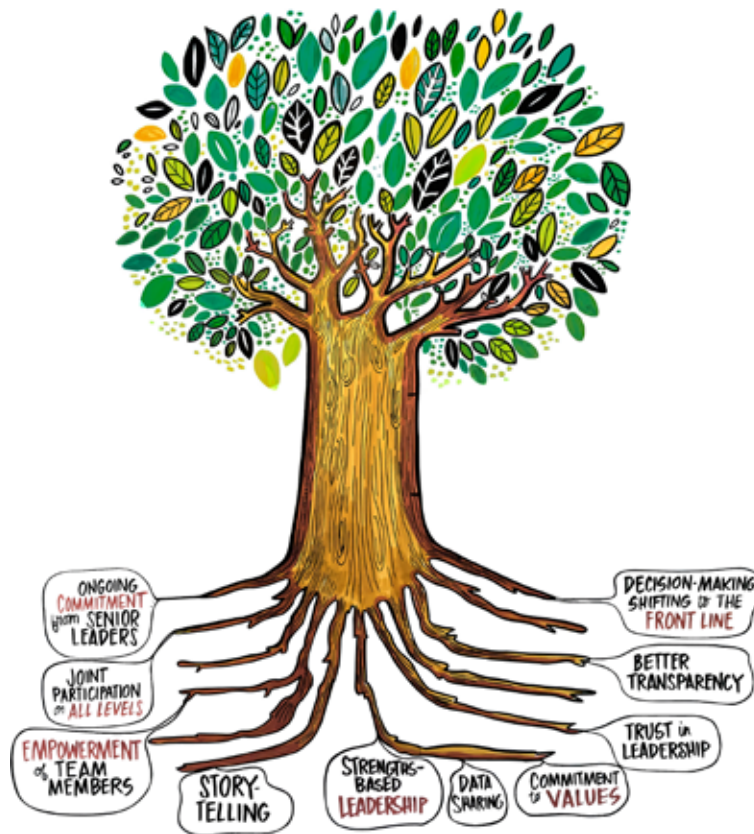
Upon reflection, a group of 40 village members identified several additional attributes they believed were also essential to our ability to embark upon and sustain our culture change journey. These attributes are depicted in Exhibit 1.3B.

James Schlegel (President, Schlegel Villages) talks about the importance of truly embracing culture change values as a senior leader:

It's amazing; I've always said this, how quickly the direct support team members will sense insincerity and lack of commitment. And it always amazes me how their senses will pick up on that, so if there isn't that passion and commitment behind it, let's not do it. It'll end up being a very painful process with very little positive results. Better not to start in the process to begin with.

(Interview, March 31, 2014)

Exhibit 1.3B: Additional values and strengths identified that support culture change at Schlegel Villages



These attributes would serve as the roots of our journey; roots that would support and anchor us and provide essential nutrients for our growth. Just think, when a tree has a good root system, it can withstand the winds of adversity. And if a tree encounters a drought, then it can sink its roots even deeper into the soil to find the water needed for nourishment and growth. Similarly, with our culture change journey firmly rooted in the organization's values and strengths, we would rely on these 'roots' to guide and sustain us when we encountered inevitable challenges along the way. Although some of our values and strengths may resonate with your organization, you may have different key attributes that will support and sustain your culture change journey.



Appendix 2 contains a worksheet designed to help you and your learning partners identify, appreciate, and grow your organization's 'roots'.



Action 1.4: Reflect on organizational readiness for culture change

Following the awareness-raising event at our 2009 operational planning retreat (please refer to Step 2), we took nearly 1 full year to continue strengthening our roots before taking any additional steps on our culture change journey. We wanted our journey to be grounded in shared understandings and values. Here are some of the things we did during that year:

- We began training all of our Personal Support Workers (PSWs) in the philosophy and practices of resident-centredness, using a 12-hour certificate program at Conestoga College. This program is called Excellence in Resident-Centred Care (www.the-ria.ca/products) and was developed by RIA and Conestoga College.

- We began training leaders and emerging leaders serving in a variety of roles, using a 180-hour certificate program at Conestoga College that focuses on the essential leadership capabilities required to nurture and support culture change. This program, also developed by RIA and Conestoga College, is called The Leadership Program for Long-Term Care and Retirement Living (www.the-ria.ca/products).
- We took the year to ‘get ready’ for culture change on the human resources front, ensuring we had the right people in the right positions and that trusting relationships were the norm between Schlegel Villages’ leaders and the people they served.
- Finally, we formed an advisory team at the organizational level (SAT), to invite greater village member involvement in decision making. In addition, we implemented conversation cafés at every village (i.e., informal opportunities for discussion and information sharing) in order to seek input from all village members about decisions that impact the entire organization. The advisory team and conversation cafés are both described later in this guidebook as our story unfolds.



Using the worksheet in Appendix 3, we invite you and your learning partners to discuss and develop goals and actions for how your organization can ‘get ready’ for a culture change journey.



Action 1.5: Learn about the importance of collaboration

Culture change requires us to look beyond the boundaries of systems created by experts, and to seek alternative sources of knowledge that are often excluded or ignored. We must honour the lived experiences and knowledge of all those involved within the community (e.g., LTC home), especially those who live there. Sadly and ironically, some culture change efforts rely upon internal and/or external experts in their design and implementation, thus perpetuating a top-down approach. As Shura, Siders and Dannefer (2011) explain:

Generally, changes are made ‘on behalf’ of residents to promote their best interests and improve their quality of life while leaving residents themselves out of the change process... [This] is not an unrecognized problem by pioneers in long-term care reform, yet it presents formidable theoretical, methodological, and existential challenges. (p. 213)

To truly change the culture, we must find ways to engage residents, family members, direct support team members, leadership team members, senior leaders/owners, and other care partners as ‘authentic participants’ in the work of culture change, and not simply as the beneficiaries of improvements.

Since 2009, Schlegel Villages has increasingly embraced a collaborative leadership style, not just to guide our culture change journey, but for all daily operations. We have also harnessed the power and energy of consensus leadership when appropriate. However, we would not describe our culture change journey as a consensus-driven endeavour.

Both collaboration and consensus stand in stark contrast to a third leadership approach that is commonly associated with the dominant, institutional model of care: command and control. At Schlegel Villages, we were clear this leadership approach would have no place in our journey.



Interestingly, consensus leadership is often viewed as the leadership style most aligned with culture change values, yet we believe it is perhaps not as conducive to the aims of culture change as often thought. Let us offer this brief explanation about why we embraced a collaborative leadership approach.

According to Ibarra and Hansen (2011), consensus leadership tends to occur in small group settings where all members of the group either have or are given equal authority in decision making, in so far as the consensus leader seeks the consent of all group members in a decision.



Collaborative leaders view all community members as knowledgeable contributors and collaborators, and seek their input. However, the leader holds the authority and accountability to make the final decisions, taking all views into consideration.

Consensus leaders seek the unanimous agreement and support of all group members in a decision.

Command and control leaders hold the power and authority to make decisions, and often do so without input from others.

While consensus leadership is a laudable goal and important to strive toward in some situations, it does not work as well in larger or more diverse groups, or when speed is important. In fact, in certain situations, consensus leadership has been described as unproductive, unmanageable, paralyzing, and possibly even destructive (Flyvbjerg, 1998).

In contrast, a collaborative leadership approach, according to Ibarra and Hansen (2011), is one in which all community members are viewed as holding potentially relevant information that the group or community needs in order to navigate important decisions and achieve success. However, while all community members are viewed as knowledgeable contributors and collaborators, designated leaders hold the authority, and, ultimately, the accountability, to make the final decisions.

In teaching our leadership team members about the alignment of collaborative leadership with culture change values, Bob Kallonen, Schlegel Villages' Chief Operating Officer, shared an intriguing study from the 1980s in which organizational theorists examined NASA's findings on the human factors involved in airline accidents. Bob asked, "Which leadership style do you think is most effective for averting an airline accident: command-and-control, consensus, or collaborative?" Here is what we learned:

NASA researchers had placed existing cockpit crews in flight simulators and tested them to see how they would respond during the crucial 30 to 45 seconds between the first sign of a potential accident and the moment it would occur. The stereotypical take-charge 'flyboy' pilots, who acted immediately on their gut instincts, made the wrong decisions far more often than the more open, inclusive pilots who said to their crews, in effect, "We've got a problem. What do you think we should do?" before choosing a course of action.

At one level, the lesson of the NASA findings is simple: Leaders are far more likely to make mistakes when they act on too little information than when they wait to learn more. But [the study] went deeper, demonstrating that the pilots' habitual style of interacting with their crews determined whether crew members would provide them with essential information during an in-air crisis. The pilots who'd made the right choices routinely had open exchanges with their crew members. The study also showed that crew members who had regularly worked with the 'decisive' pilots were unwilling to intervene – even when they had information that might save the plane (O'Toole & Bennis, 2009, p. 3).

This example demonstrates that collaborative leadership is most effective when it is used routinely and often, and not as a one-off approach in certain circumstances. Although consensus leadership can work well in some cases, collaborative leadership is often preferred when the focus is on achieving shared goals, and when innovation and creativity are essential.

In the case of culture change, we believe the most effective, empowering, and sustainable culture change initiatives develop from collaborative processes that include all community members (e.g., residents, family members, team members, volunteers, senior leaders/owners, community partners, etc.) in decision making whenever possible. In the following example, Jennifer describes her early attempts at culture change and some of the reasons why she wanted to take a collaborative approach at Schlegel Villages.



‘Why we need collaboration: Early learnings’

Written by Jennifer Carson

I was so excited to partner with RIA and Schlegel Villages on a truly collaborative approach to culture change, in part because I learned a lot from previous failures. Earlier in my career, I tried leading people to a particular vision of culture change, usually that of some expert whose work I really admired; something I read about in a book or heard at a conference. Well, back in those days, I tried to ‘manage’ change. Instead of collaborating, I spent a lot of time trying to inspire or convince people to buy into whatever grand idea I was selling, which really didn’t go so well. If people did not buy into my culture change idea, then I used my administrative authority to enforce it. At one community, they actually called me the ‘Gentlecare Dictator’. Ouch! But that was sadly kind of accurate. I was ‘implementing’ culture change, sometimes with an iron fist. I needed to change.

From what I’ve observed, top-down approaches to ‘implementing’ culture change run rampant in the movement, and it’s hard to resist because so many people just want the recipe, the quick fix, which is pretty much the same as asking for a top-down approach. Now I understand that when an individual or organization embarks on a culture change journey with some formulaic idea of what it should all look like in the end, certain perspectives are privileged and certain perspectives are ignored, perpetuating the very hierarchies which culture change seeks to flatten.

No matter how wonderful the vision or benevolent the intent, a top-down approach reinforces the dominant culture. To put a fine point on it, the current culture is an expert-driven culture. Organizations that desire to change it should take a collaborative, process-oriented approach which engages all community groups and, to the extent possible, all community members in decision-making.



At Schlegel Villages, we thought of collaboration in terms of ‘authentic participation’ (Tandon, 1988), meaning that village members are not simply ‘included’ in the work of culture change, but they also:

1. play a role in setting the culture change agenda;
2. participate in related data collection and analysis; and
3. share ownership in every aspect of knowledge production and changes in practice.



Using the worksheet in Appendix 4 we invite you and your learning partners to explore and discuss the role of collaboration and authentic participation in culture change.

Jenny Brown (Director of Recreation, Village of Aspen Lake) describes a previous culture change experience she had and the importance of commitment:

Everyone, everyone has to be committed. I do believe that commitment is a huge thing in culture change. Where I came from before I came to Schlegel Villages, we did something similar, it was different but similar in that every home was required to have an Eden-trained Associate, but that was just one person in the home. We had a whole binder full of ideas, but because it never had any really huge commitment from really anyone, nothing ever happened. And so there were those of us who were lucky to be sent to the training and really thrived on it, but then were frustrated when we came back. So the big difference between that and where I see us now at Schlegel Villages is that commitment is running not only through the Support Advisory Team but is running through the whole village at all levels and at leadership levels, too. And I don't see how you can possibly change the culture without having a commitment to it.

(Interview, March 31, 2014)

With collaboration and authentic participation in mind, Bob, Jennifer, and Josie understood the critical importance of engaging a much larger number of village members in making the decision of whether or not to embark on a culture change journey. This leads us to Step 2, where we describe how Bob, Jennifer and Josie planned an awareness-raising event at Schlegel Villages' 2009 operational planning retreat in an effort to collaboratively determine if there was a need for change.



A colorful illustration of a town scene. In the foreground, a large green hill curves across the bottom. To the left, several green pine trees of varying heights stand on the hill. To the right, a row of buildings in red, purple, and orange is visible. A winding path leads from the foreground towards the buildings, with two silhouetted figures walking along it. The sky is filled with horizontal blue brushstrokes.

Step 2: Raise Collective Awareness

Collaboratively reflect and raise awareness about the current organizational culture and determine if there is a need for culture change

- Action 2.1:** Plan an awareness-raising event
- Action 2.2:** Teach event participants about the culture change movement
- Action 2.3:** Engage event participants in collaborative reflection and dialogue about the current organizational culture, strengths, and opportunities for improvement
- Action 2.4:** Build consensus and make a collaborative decision to embark on a culture change journey

Resource materials for Step 2 are provided in Appendices 5 – 7.



Step

2

Raise Collective Awareness

Introduction

While Bob, Jennifer, and Josie knew that the Schlegel Villages' leadership team had identified the need for culture change, they also understood the critical importance of engaging more village members to see if there was strong support across the organization about the need to embark on a culture change journey. To that end, Bob, Jennifer, and Josie planned and facilitated a reflection and awareness-raising event that engaged 140 leadership and direct support team members in collaborative learning, discussion, consciousness-raising, and critique regarding the realities of Schlegel Villages' organizational culture at that time.

The goals of the event were:

1. to teach participants about the culture change movement;
2. to teach participants strategies for meaningful group discussion and collaboration;
3. to collaboratively identify Schlegel Villages' strengths and challenges/opportunities for improvement; and
4. to collaboratively decide whether or not to embark on a culture change journey.

Drawing on our journey, Step 2 explores some of the actions your organization can take to collaboratively reflect and raise awareness about your current organizational culture and determine if there is a need for culture change. In this Step, Jennifer provides a number of first-hand accounts to speak to our commitment to storytelling, and because she played a crucial role in organizing and facilitating the event.



Action 2.1: Plan an awareness-raising event

Understanding that the impetus for culture change must come from the community, Bob, Jennifer and Josie began planning how to engage 140 leadership and direct support team members in reflection and consciousness-raising about Schlegel Villages' culture. They wanted this event to be participatory, and turned to Freire's (2007) critical pedagogy and the principles and practices of Dialogue Education (Vella, 2001, 2002, 2008) for guidance.

The objective was not to tell team members about culture change and point out deficits within the organization or mandate organization-wide changes. Instead, the objective was to engage team members in reflection and dialogue about the organization's values and practices, to generate and explore ideas for future improvements, and to model a process of collaborative learning and decision-making that would continue beyond the event.

The 6-hour event was planned to take place at Schlegel Villages' 2009 operational planning retreat; an annual 3-day event in which leadership and direct support team members from all of the villages (10 at that time) gather in a beautiful, natural location to learn, share ideas, develop goals and action plans for the upcoming year, learn about important organizational updates, celebrate awards and accomplishments, and engage in some team-building, socializing and fun. At that time, only team members were invited, but over the years, as we have continued on our culture change journey, more and more residents and family members are also involved.

Testimonial from a Schlegel Villages team member

Bob and I had a discussion with the GMs to say we're really interested in doing this, but we wanted to hear from them whether it was something they could support and get passionate about because without the village leadership 100 percent behind this we knew it wouldn't be successful. It was heartening to hear both how quickly and how fervently the village leadership supported this notion, and then we started moving forward from there... the GMs jumped on board very quickly and then we broadened the discussion to see if there was wide support within the Schlegel team for this initiative. It was just astonishing to me to see how people shared the same vision. It wasn't about convincing people; it was about team members sharing the same vision... everybody, almost without exception, said "you know that's exactly what I want to try to achieve in my career, in my life, is to create the sort of world where aging is celebrated and honoured," and we had a part in creating that sort of society and that our organization was a place that created an environment where people could age richly and successfully. I'm just entirely humbled by being given the opportunity to be part of it frankly.

(Interview with James Schlegel, President, March 31, 2014)

Bob, Jennifer, and Josie thought strategically about how to engage all participants as teachers and learners (Freire, 2007) with the following five culture change topics, all of which are described further in subsequent actions:

- Reflecting on the current culture of aging;
- Putting living first: shifting from the current institutional model of care to a social model of living;
- Building empowered teams: transforming job structures and hierarchies;
- Nurturing an authentic home: the role of the physical environment; and
- Engaging all community members: collaboration and the path to real change.



We planned a variety of exercises to engage team members with these topics, including: World Café exercises (www.theworldcafe.com; Appendix 6), Learning Circles (Shields & Norton, 2006; Appendix 7), group discussions, and individual reflective writing tasks. We describe these exercises in greater detail in the following Actions. Appendix 5 contains a facilitator guide, modelled after the process we followed at our event, which you may find helpful to guide your event.

But, first, it is your turn to discuss some initial ideas for how you can plan a reflection and awareness-raising event. Perhaps you will consider meaningful ways to engage residents and family members as a part of this event.



Discussion Questions

1. Why is it important to engage team members in reflection and awareness-raising prior to asking their thoughts and opinions regarding whether or not your organization should embark on a culture change journey?
2. Why is it important to engage residents and family members in reflection and awareness-raising prior to asking their thoughts and opinions regarding whether or not your organization should embark on a culture change journey?
3. What kind of reflection and awareness-raising event can you envision?
4. Who should be involved in planning the program and logistics of this event?
5. Who will be invited to this event?
6. What topics would be important for team members to explore at this event?
7. In what ways can you envision engaging team members as teacher-learners at this event? What about residents and family members?
8. What specific exercises and/or activities might be effective?



Action 2.2: Teach event participants about the culture change movement

In the following story, Jennifer describes how the event began.



'What would happen if we put living first?'

Written by Jennifer Carson

At the beginning of our 6-hour event, which we titled, Changing the Culture of Aging... One Village at a Time, team members were sitting at round tables, mostly by village, with roughly eight people per table. To warm up and set the stage for discussion, Josie and I began by showing a rock music video by the Young@Heart Chorus, comprised of singers ranging in age from 73 to 89.

We selected a song to inspire critical reflections on the dominant culture in North American LTC homes; their rendition of the Ramone's I Wanna Be Sedated. The video, which is staged in a nursing home, features several iconic symbols of the institution: painted cement block walls; a long maze of brightly-lit, homogenous-looking corridors; uncomfortable furniture that looks like a hand-me-down from a hospital waiting room or prison; and old people in housecoats and pajamas slumped in their wheelchairs, gathered around a television with nothing but static on the screen. Against this backdrop, members of the Young@Heart Chorus sing... plea... demand, "I wanna be sedated!" After watching the video, we asked each table to discuss the following questions as a group:

- Why do the members of Young @Heart want to be sedated?
- How is the culture of LTC depicted in their rock video?
- How does this depiction resonate with your observations and experiences within LTC?

The video struck a chord and the conversations swelled. After a few minutes, Josie and I brought

everyone together for large group discussion. Team members jumped right in, bravely offering critiques not just about the culture of aging, but about their home Villages; powerful, honest, and heartfelt critiques.



The following themes emerged from this large group discussion:

- the current culture of LTC is institutional;
- much of daily life at Schlegel Villages reflects an institutional model of care;
- the culture of LTC is tied to the broader culture of aging; and
- in order to transform the culture of LTC, we must also transform the culture of aging.

Although these themes emerged from our discussion, if you choose to engage your organization in a similar discussion, the outcomes will be unique – just like your organization.

In order to truly transform the culture of aging, Fagan (2003) suggests that the following constructs need to transform:

- individual and societal attitudes toward aging and older adults;
- attitudes of older adults toward themselves and their aging;
- attitudes and behaviour of caregivers toward those for whom they care;
- governmental policy and regulation; and
- the ‘system’ across the continuum of aging services as we transition from institutional models of care to social models of living.

Essentially, in the most general of terms, we defined culture change as a shift from an institutional model of care to a social model of living; a shift in focus from providing care to supporting living. We still must provide excellent health care, but without making it the central focus. Culture change calls us to put living first.



We asked team members to engage in some personal reflection and think about a time in their own practice when they ‘put living first’. We asked them to consider and write down how it made them feel and how they think it made the resident(s) feel. After a few minutes, we asked for some volunteers to share their responses. Several team members shared and their stories clearly illuminated 2 things:

1. Everyone is happier when we put living first; and
2. An institutional model of care/mindset is the biggest obstacle to putting living first.



Discussion Question

Think of a time in your own practice when you ‘put living first’. How did it make you feel? How do you think it made the resident(s) feel?



Action 2.3: Engage event participants in collaborative reflection and dialogue about the current organizational culture, strengths, and opportunities for improvement

Putting living first: Shifting from an institutional model of care to a social model of living

The previous exercise demonstrated that village members were interested in learning more about how to put living first. It was time to look deeper at the institutional model of care and, as a group, consider its presence within Schlegel Villages.

The next activity was a collaborative organizational assessment in which groups of team members rated the organization according to different domains of LTC on a continuum with 'institutional model of care' and 'social model of living' at either extreme (See Exhibit 2.3A).

Exhibit 2.3A: Collaborative organizational assessment (adapted from Fagan, 2003)



<i>Institutional model of care</i>	<----->	<i>Social model of living</i>
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
Team members rotate	1 2 3 4 5 6 7 8 9 10	Team members 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
Team members 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
TOTAL SCORE:		
OVERALL AVERAGE: (total score/9)		
What is your village's area of greatest strength?		
What is your village's area of greatest need for improvement?		

For the purposes of this exercise, participants were asked to rate the organization across these 9 domains on a scale from 1 to 10, with 1 meaning 'very institutional' and 10 meaning 'very social'. Please note that this is not a validated instrument, but it has served as a meaningful tool to guide conversation. Over time, and for the ease of communication, we have come to refer to the domains described in this table as the '9 domains of culture change'.

The purpose of this consciousness-raising activity was to engage groups of team members in critical reflection and dialogue as they collaboratively assessed the organization's strengths as well as opportunities for improvement. To fulfil this purpose, we designed the activity as a 'World Café'. Please see Appendix 6 for details about the *World Café* format.

By design, team members were asked to get up and move to different tables for 2 rounds of conversation and ratings. Team members were highly engaged in the process. They seemed to appreciate the experience of having open dialogue about the realities of village life with people working in different positions, in different departments, and from different villages to collaboratively determine ratings. Table hosts (i.e., facilitators) worked hard to bring their diverse 'guests' to consensus as they collaboratively rated the organization on the 9 domains of culture change. Then after 15 minutes, there was another burst of chaos as everyone rotated tables for the second round of discussion.

Following the second round of conversation, Josie and Jennifer facilitated a large group discussion. They began by asking for some volunteers to share what the experience of the *World Café* was like. Here is a summary of some of the responses:

- Generally, those who shared described how much they valued and learned from one another, and how much they appreciated the opportunity to see things from a different perspective.
- A few people noted a tendency for direct support team members to offer lower ratings on the domains than managers. For instance, while managers tended to view the organization as more of a collaborative team, the direct support team members viewed the organization in terms of hierarchical departments.
- Another team member said she felt validated by the discovery that some of the challenges experienced at her village were shared by team members from other villages.
- Team members found it interesting that colleagues from the same village often rated the same domain very differently. For example, one team member might assess opportunities for activities at her village as 'very structured', whereas another team member from the same village might assess opportunities for activities as 'planned, flexible, and spontaneous'.

Next, we asked the 17 table hosts to report their overall score (an average of all domain scores). In cases where a consensus rating did not easily emerge, most table hosts said final scores were determined by calculating an average based on individual responses. The purpose of this collaborative assessment 'activity' was not to objectively quantify aspects of Schlegel Villages' culture, but to engage team members in critical reflection, dialogue, and consciousness-raising.



Finally, table hosts reported findings regarding their guests' perceptions of Schlegel Villages' area of greatest strength, and area of greatest need for improvement (i.e., challenges), summarized below:



<i>Most Commonly-Identified Areas Of Greatest Strength</i>	<i>Most Commonly-Identified Areas Of Greatest Need For Improvement</i>
<ul style="list-style-type: none"> • Home-like/welcoming environment • Sense of community • Passionate team members • Education and training programs • Focus on research and innovation • Mutual relationships • Committed and caring leaders/owners 	<ul style="list-style-type: none"> • Scheduled routines need to be more flexible • Give residents choices in all areas and listen to their wants/needs/priorities/schedules • Work as a collaborative, cross-trained team, not separate departments or roles • Need more direct support team members

During this discussion, Josie calculated an organizational average based on the overall score reported from each table. Based on their collaborative assessment, Schlegel Villages' average score was 4.7 out of 10, suggesting the organization may be more aligned with an institutional model of care than a social model of living. The room paused in silence. Despite the Schlegel Villages' awards, recognitions and praises, despite the benevolence, generosity and vision of its owners and senior leaders, despite the beautiful physical design of each village, despite the passion, devotion and hard work of team members, despite all the good relationships, there it was; a score of 4.7 out of 10, based on the experiences and judgments of team members themselves.

Testimonial from a Schlegel Villages Team Member

While we were considered progressive and thought we were doing things that were innovative, and many things were, I think it was interesting to frame and re-frame it when we started to reflect on what an institutional environment looks like and why a social model of living is important. Back then, we looked a lot like an institutional environment, and I think people, to varying degrees, had trouble with that... and there was a real desire amongst a substantial core of people to make a change.

(Interview with Matt Drown, Vice President of Human Resources, March 12, 2014)

As Jennifer and Josie scanned the crowd, some team members nodded in agreement, as if to say, "I knew it all along," while others looked like they were having a revelation. Some team members looked concerned, maybe even uncomfortable, as their eyes darted from James to Bob to their GM. Some team members looked deflated, and a few looked downright depressed. After spending the morning exploring the inherent challenges in an institutional model of care, this was a hard pill to swallow.

Recognizing that this finding was difficult for some team members to hear, Jennifer asked them to shift their thinking a bit and visualize the ideal village in which to live and work, "What possibilities can you imagine?" She further engaged team members' imaginations by playing an introductory video from the Pioneer Network (available on YouTube at <https://www.youtube.com/watch?v=OsWsJ2YVTEA>, or by contacting the Pioneer Network for the DVD) that shares

the perspectives of residents, family and professional care partners, and describes the need for culture change. Most importantly, it offers an inspiring view of what is possible when people and organizations embrace culture change values and evolve.

Over the course of the video, the energy level returned to the room. When the video was finished, Josie and Jennifer asked if anyone would like to share their thoughts about the video or anything else we explored that morning. Some team members expressed their appreciation for the opportunity to have an open and honest dialogue about the ‘real issues’, while others conveyed their excitement about the possibilities of culture change. It was a good morning, and after lunch, we would take the conversation even deeper.



Discussion Question

What do you see as the ideal place in which to live and work?

Building empowered teams: Transforming job structures and hierarchies

During the event we introduced the topic, People: Building Empowered Teams, with a question for personal reflection: “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?”

The hands went up quickly when we asked for volunteers to share their reflections. Several team members shared their frustrations with a perceived lack of teamwork, setting the stage for a large group discussion about the way in which LTC homes are organized. We prompted the discussion with the following lead-in:

There are nearly 18,000 LTC homes in North America, including more than 600 in Ontario. The overwhelming majority are structured in exactly the same way: top-down direction, task-oriented practices, and an institutional atmosphere. We can all easily recite the departments and positions in any LTC home in any town in any province. Why do you think this the case, and how can it be otherwise?

The ensuing discussion was lively and animated, but it was difficult to pin down any logical reason why the current paradigm exists. We reasoned that if there is not a compelling rationale for living and working in this top-down, task-oriented institution, then perhaps the situation is open for revision.

Taking this idea further, we then asked team members to discuss how certain institutional practices play out in the lives of residents, family members, and team members. Specifically, they were asked to identify ‘things that disturb us (and residents)’ and to speculate ‘why they happen’.





Sometimes regulatory standards do indeed pose barriers to culture change, but sometimes those barriers are more imagined than real. We challenged people, when this response came up, to really think about whether it is the regulation itself, or whether it is the way it is being interpreted, that poses the barrier.



The activity was structured as another *World Café* (see Appendix 6). After 2 rounds of discussion, team members came up with 108 different things (mostly practices) that disturbed them. These items are presented in Exhibit 2.3B. It was not as easy to identify why these practices occur, but one common response was “because of the institutional model,” followed by “because of Ministry [regulatory] standards.”

Based on the disturbing things they had identified, team members were then asked, “What is needed to move towards a social model of living?” Their responses are also presented in Exhibit 2.3B.

Exhibit 2.3B: ‘Things that disturb us’ and ‘what is needed to move towards a social model of living?’



<i>Things that disturb us</i>	<i>Examples</i>	<i>What is needed to move towards a social model of living</i>
Resident rights, dignity and respect issues	<ul style="list-style-type: none"> • Team members using chemical or physical restraints with residents; opting for a quick fix instead of trying to understand the underlying causes of behaviours • Team members focus on completing tasks with a lack of resident interaction due to time constraints • Instead of supporting residents in decision-making, team members make decisions for their own convenience, routine or due to their (mis) interpretation of a policy 	<ul style="list-style-type: none"> • Shift the focus from task to relationships • Move decision-making as close to the resident as possible, if not with the resident him- or herself • Use a collaborative decision-making process (i.e., ‘neighbourhood meetings’ or ‘<i>Learning Circles</i>’) to plan menus, activities, and daily routines

Continued on next page

<i>Things that disturb us</i>	<i>Examples</i>	<i>What is needed to move towards a social model of living</i>
Rigid routines, scheduling, and staffing (lack of staffing) issues	<ul style="list-style-type: none"> Baths/showers are scheduled, offered only once per week, and only on a given day due to team members schedules and work organized by silos Lack of flexibility in daily schedule (residents up 2 hours before breakfast/in bed at 6 or 7PM/ unable to sleep in/unable to choose bath time/ preferences not honoured/night-time 'toileting rounds') due to limited number of team members, time constraints, team members' convenience, avoiding conflict with next shift, and strict time management to get the job done Team members rush to do job essentials due to daily requirements and institutional routines Lack of team members/lack of time to spend with residents/poor ratio of residents to team members/working short due to inadequate wages, inadequate budget and traditional staffing structure 	<ul style="list-style-type: none"> Establish self-scheduling work teams that consistently assist the same residents
Food service and dining issues	<ul style="list-style-type: none"> Rigid mealtimes due to kitchen routines, Ministry standards, and structured schedule for team members Residents wait around and are then served cold food due to lack of team members and lack of time to assist residents Assigned seating for residents (no choice) for team members convenience 	<ul style="list-style-type: none"> Decentralize dining so that meals are prepared on a flexible basis close to where each resident dines. Residents and families should have access to the kitchen and even participate in cooking activities
Teamwork issues	<ul style="list-style-type: none"> Lack of teamwork ('that's not my job') due to departmental focus, lack of cross-training/ training, and people unwilling to do unglamorous jobs Lack of respect for each other's jobs due to a lack of education and a focus on traditional roles 	<ul style="list-style-type: none"> Cross-train team members to work in more blended roles ('versatile team members')
Recreation issues	<ul style="list-style-type: none"> Residents missing valued programs/denied access to programs/taken out of programs due to PCA/PSW routines and team members schedules Not enough evening activities on the dementia 'units' due to team members structure, scheduling, and traditional job roles ('that's not my job') 	<ul style="list-style-type: none"> Work together to discover and support residents' leisure preferences. Everyone takes part in the provision of meaningful activities
Attitude issues	<ul style="list-style-type: none"> Lack of team members participation on special days due to negativity and feeling that this is just a job (vs. a community) Team members rushing through their day due to task-orientation 	<ul style="list-style-type: none"> Flatten the organizational structure and empower direct support team members and residents

This activity revealed numerous challenges encountered by team members which were often the result of working in departmental silos with highly structured schedules, rigid routines, and a task-focus. In general, team members found themselves ‘disturbed’ when institutional routines and practices took priority over resident-expressed preferences and needs.

As a source of inspiration, Jennifer described the GREEN HOUSE Project (www.thegreenhouseproject.org), and how transformative thinking (as in the previous example) created a new reality. For example, the GREEN HOUSE Project changed job structures and the traditional, institutional hierarchy into a team-oriented organizational structure (See Exhibit 2.3C).

Exhibit 2.3C: The GREEN HOUSE model of self-managed teams

Homes are staffed by a team of universal workers, known as Shahbazim, who meet certification and educational requirements as required for their roles and receive extensive additional training in The GREEN HOUSE principles, practices, necessary role skills (e.g., culinary training, recreation, housekeeping, scheduling, etc.), and the skills required to operate in and with self-managed teams. The people who live and work in a GREEN HOUSE home collaborate to create a flexible daily routine that meets individual needs and preferences. If they wish, elders can help cook, help with housekeeping and laundry. There is no predetermined routine, facilitating independence and the ability to pursue individual interests and schedules. The combined Shahbaz role puts more direct care hours in the house allowing intensive relationships to form between staff and elders, particularly elders with the highest needs. Deep relationships are the basis for the model’s dramatic improvements in quality of life and care. (adapted from www.thegreenhouseproject.org)

Anticipating that some team members might quickly regard this type of job structure as ‘good on paper, but impossible in practice’, Bob, Josie and Jennifer came prepared with video ‘evidence’ to demonstrate that such ways of practicing and relating are, indeed, possible and thriving in other organizations. The video that they showed ([available at https://www.youtube.com/watch?v=l4Ap1ByNgKE](https://www.youtube.com/watch?v=l4Ap1ByNgKE)) is a mini-documentary that focuses on the very first GREEN HOUSE home at Traceway Retirement Community, part of Mississippi Methodist Senior Services, in Tupelo, Mississippi. It provides a great overview of the GREEN HOUSE philosophy as it follows a handful of LTC residents during their transition from a traditional, institutional nursing home to a brand-new GREEN HOUSE home. Toward the end, Stephen McAlilly (President and Chief Executive Officer, Mississippi Methodist Senior Services) tearfully describes his observations of the massive difference the GREEN HOUSE model makes in the lives of older adults:



People who were in wheelchairs are walking again; people who weren’t talking are talking again; people who weren’t eating real food are eating real food again; people who were losing weight, no matter how hard we tried in the nursing home, they’re gaining weight again; people who when you walk in the door, you see a twinkle in their eye again; it’s almost sinful not to do as much as we can, as fast as we can.

McAlilly’s words help to erase some of the concerns about the hard work and difficulties involved in eliminating the institutional model of care because it highlights not only the immense reward, but our moral duty to make change. When we have such pioneers taking the big risks by stepping into uncharted territory, discovering a better way, and then sharing their map, how can anyone in good conscience remain tied to the status quo?

Nurturing an authentic home: The role of the physical environment

During the event, Jennifer led a discussion about the meanings people attach to ‘home’ and ‘community’, and the importance of shaping a physical environment to afford opportunities for personalization, comfort, social interaction, privacy, structured and self-directed activities, control, and contribution. Some of the key points from this discussion included:

- **The importance of light, nature and having free access to the outdoors**
Jennifer conducted her Masters research in a ‘dementia care unit’ where residents had visual access to a beautiful yard, and yet the doors were kept locked because, as the staff there explained, the yard was not level and they did not want anyone to fall. What the staff did not take into account was the human suffering that comes from having visual access to places one cannot freely go. “They should have levelled the yard,” Jennifer explained.
- **The history and evolution of the iconic nursing station**
Nothing says ‘us and them’ more clearly than ‘the nursing station’, and as a result, some LTC homes are tearing them down and replacing them with more residential-looking and community-oriented options.
- **The importance of providing opportunities for residents and family members to care for the village, as desired**
Having opportunities to care for one’s environment can help foster a sense of place and belonging, and contribute to a sense of purpose.
- **The way that the language we use affects the way we think about our environment**
The use of a room is shaped by what we call it (e.g., nursing station, shower room, unit, etc.).


After this discussion, it was time for another *World Café* activity. This time, team members were asked to:

1. Identify features or aspects of the physical environment (at their village) that reinforce the prominence of the team members’ workplace and contribute to an ‘us and them’ feel; and
2. Identify potential modifications to this feature or aspect in order to provide a better sense of ‘home’ for residents and promote a community feel.



Following the activity, we asked the table hosts (i.e. facilitators) to report back the most common responses or strongest themes from their tables. The three most frequently reported areas and several ideas for modifications are listed below:



<i>Features/aspects of the physical environment that contribute to an 'us and them' feel</i>	<i>Potential modifications to provide a better sense of 'home' and community</i>
Dining services (i.e., centralized kitchen, institutional dining rooms) 	Suggestions for the kitchen: Create open access, we need a kitchen/kitchenette on every floor/in each home area, and family-style serving Suggestions for the dining rooms: Create open access, give it more of a country kitchen feel, bring in warm interiors, use steam tables, team members and residents have meals/drinks together, get rid of dining room stools, and do not have formal dining every night
Nursing station	Suggestions: Eliminate counter/wall, redesign with an open concept, create a common area for all, and use residential furnishings like a roll-top desk and cabinets
Locked/secure doors	Suggestions: Unlock seasonally, open doors and have better monitoring, provide freedom to outdoors, use door sensors as necessary, remove divider doors between LTC and retirement living (closed door suggests there is no continuum), and use stained glass in doors so that residents cannot see places they cannot freely access

In addition to these three problem areas within the physical environment, a number of team members identified several additional areas of concern (e.g., uniforms, furniture, locked cupboards, over-head paging system, medication carts, nourishment carts, signage, call-bells, shower room, etc.) and a number of suggestions for improvement.

By this point in the afternoon, the need for culture change at Schlegel Villages felt like a shared concern. We could sense an increasing awareness in the room, but also growing uncertainty about where to begin and how to take action.

As Bob, Josie and Jennifer planned for this day, they hoped the conversation would lead to questions of action, and, thus, they prepared the final component of our event to include a brief exploration of the culture change process and the need to engage all village members.

Testimonial from a Schlegel Villages Team Member

At the beginning, I thought, oh my God, there is no way. And I'm sure if people were honest enough ... they'd say that when [Jennifer] stood on that platform that day and started talking to us about culture change, 75% of the people in that room thought [she] was whacked. There's no way. You know, we've been doing it this way for so long, the ministry standards [are] in place, the long term care act [is] in place, there's no way. But then I started thinking, what if we could change? Am I willing to put the brakes on and do what it takes to get us where we need to go, even if it takes us 10 years to get there? And then, I started thinking, wow, what a legacy to be part of that.

(Interview with Pam Wiebe, GM, Coleman Care Centre, March 14, 2014)

Engaging all community members: Collaboration and the path to real change

We have already made a case about the importance of collaboration (Step 1), and we wanted to explore how we could enhance our collaborations through discussion with this larger group of team members. We engaged team members in *Learning Circles*. Please see Appendix 7 to learn more about *Learning Circles*.

The *Learning Circle* topic was 'How to Become a More Collaborative Village.' To address this topic, team members were asked to use *Learning Circles* to explore 2 questions:

1. What opportunities currently exist for residents to participate in decision making, and how effective are these opportunities?
2. What more can we do to include residents in decision making? In other words, how can we improve existing opportunities or create new opportunities?

After 30 minutes, we asked for some volunteer facilitators to share some of the ideas expressed in their *Learning Circles*. Most of the facilitators said team members in their *Learning Circle* were challenged to think of ways residents are meaningfully engaged in decision making at the village beyond their own personal care, and, at times, even that level of engagement could be improved. However, team members identified several ways that residents could be included in the decision-making process. Some of their responses are summarized below.

- Establish a quarterly resident-team member interview or a 'village coalition' to provide wise counsel to the GM
- Invite residents to weekly neighbourhood meetings
- Re-institute quarterly 'Town Hall' meetings and invite all residents
- Invite residents to participate in performance appraisals of team members
- Invite residents to participate in team member interviews and exit interviews
- Engage 'future residents' in shaping the future; find out what they want



Discussion Question

What opportunities exist within your organization for residents to participate in decision making? What more can your organization do to include residents in decision making?



Action 2.4: Build consensus and make a collaborative decision to embark on a culture change journey

Finally it was time to make a decision; time to ask who would support and contribute to a collaborative culture change journey at Schlegel Villages. Bob closed the event by thanking team members for sharing their insights and ideas so openly and with such passion. Then he shared his personal desire to embark on a culture change journey and the story of his drive from Windsor to Kitchener with James. Then he asked team members to demonstrate their support by raising their hand. We did not take a formal count, but consensus was clear.

Jennifer tells the story of the moment that Schlegel Villages realized it was about to embark on an exciting journey:



'The long road ahead' *Written by Jennifer Carson*

So there we stood at the beginning of a very long road with only our values to guide us. With the awareness that this would be a process-oriented journey guided by values, Bob summarized the key aspects of the organizational culture that would serve as the roots of our process, enabling a more successful and sustainable journey, including: resident-centredness, serving leadership, village member involvement in decision making, strong relationships, and our organizational capacity for learning and innovation.

Other than working to strengthen these roots, Bob cautioned everyone in the room to resist the urge to go back to their village and start making changes. “We will do this together,” he said, as he pledged his support to a collaborative and lasting process. “This will not be ‘flavour of the month’ but a continuous and perhaps never-ending journey of learning, sharing and innovating... an ongoing quest to help residents and team members meet their greatest ambitions.”

Bob confessed he did not know what the next big step would be – as that would suggest a top-down approach to change – but promised our journey would unfold at an organic pace through collaborative decision-making. At the end of the day, that was all any of us knew.



Now it is your turn. Appendix 5 provides a facilitator guide to help you plan and deliver a reflection and awareness-raising event in your organization. Keep in mind you will need to tailor this to best suit the needs of your organization.

A colorful illustration of a town scene. In the foreground, a large green hill curves across the bottom. To the left, several green pine trees of varying heights stand on the hill. To the right, a street with a sidewalk leads towards a row of buildings. The buildings are drawn in a simple, sketchy style with various colors: a red building with a yellow awning, a white building with arched windows, and an orange building. Two black silhouettes of people are walking on the sidewalk. The sky is filled with horizontal blue brushstrokes.

Step 3: Form an Advisory Team

Form an advisory team to help guide the collaborative culture change journey

- Action 3.1:** Learn about Appreciative Inquiry
- Action 3.2:** Identify and invite a diversity of organization members to serve on an advisory team
- Action 3.3:** Teach potential advisory team members about culture change and Appreciative Inquiry
- Action 3.4:** Teach advisory team members about authentic partnerships
- Action 3.5:** Collaboratively develop guiding principles
- Action 3.6:** Plan an Appreciative Inquiry summit

Resource materials for Step 3 are provided in Appendices 8 – 12.



Step

3

Form an Advisory Team

Introduction

Based on the strong support garnered through our awareness-raising event, Schlegel Villages made the decision to embark on a collaborative culture change journey.

Since joining Schlegel Villages in 2008, Bob had worked hard to nurture a strengths-based leadership style within the organization, so we knew that we would need to adopt an approach that would allow us to build on our strengths rather than focus on solving problems. The idea of spending more time and energy identifying and fixing problems within the organizational culture seemed contradictory to the values and approach Bob and the Schlegel family were working to instill. Really, while there was widespread agreement about the need for change, the reflection and awareness-raising event left some team members feeling a little deflated; to identify so many problems after all their hard work. So, we started searching for a light; for a positive approach to collaborative culture change.

Drawing on our journey, Step 3 explores the process of AI and the development of an advisory team to help guide a collaborative, strengths-based culture change journey.



Action 3.1: Learn about Appreciative Inquiry

In the following story, Jennifer shares how Schlegel Villages explored and made the decision to embrace AI (Cooperrider & Srivasta, 1987; Cooperrider & Whitney, 1999; Cooperrider, Whitney, & Stavros, 2008), a strengths-based organizational change strategy and form of participatory action research, and how that decision led to the formation of an advisory team to guide the AI culture change process.



'How Can We Fix Problems Without Focusing on Them?'

Written by Jennifer Carson

In my search of positive approaches to culture change, I came across a number of compelling studies about the use of AI to guide whole-system change within businesses, social not-for-profit organizations, educational institutions, healthcare organizations, religious organizations, and even governments. The more I read about AI, the more I wondered what Bob and Josie would think about using it to guide our journey. It seemed well aligned with the collaborative, serving, and strengths-based values they were fostering within the organization. So I gave him some introductory readings, including Hammond's (1998) *The Thin Book of Appreciative Inquiry* and an excellent chapter about a successful AI summit by Luedma et al. (2008).

At our next meeting Bob and Josie expressed how much AI resonated with them. Interestingly, Josie noted, the RIA-Conestoga College leadership course (www.the-ria.ca/products) had an entire module on AI and leadership, and as a result, many leadership team members were already learning about the approach.

In June 2010, I gave a presentation at the quarterly meeting of GMs about AI and organizational change. I explained that if we were looking for a way to enhance our strengths; inspire

widespread participation; foster collaborative learning; mobilize democratic action; and respect the uniqueness of each village and each village member; all this could be achieved through AI (Cooperrider & Srivasta, 1987; Cooperrider & Whitney, 1999; Cooperrider, Whitney, & Stavros, 2008). In contrast to the problem-based approach common in many other culture change initiatives, AI draws upon personal and collective strengths, values, positive experiences, and dreams, as groups work together toward a more ideal future.



AI is an organizational development strategy that focuses on the cooperative search for the best in people, their organizations, and the world around them. “AI assumes that every living system [including LTC, retirement living, and the broader culture of aging] has untapped, rich, and inspiring accounts of the positive” (Cooperrider and Whitney, 1999). In stark contrast to deficits-based change strategies which focus on the identification of problems and fixing the past, AI involves the systematic discovery of what gives a system or organization life. Instead of negation, criticism, and spiraling diagnoses, AI gives way to imagination and innovation by mobilizing inquiry through four cycles of reflection and action:

1. **Discovery:** uncover the best of ‘what is’;
2. **Dream:** imagine ‘what could be’;
3. **Design:** create ‘what should be’; and
4. **Destiny:** plan to enact and sustain our design as we move toward our destiny.

AI brings people together to create and sustain positive social change, valuing the perspectives and knowledge of those who are most affected by the issue under study, in this case, people living and working in LTC, retirement living and across the culture of aging.

After Jennifer’s presentation to the GMs, followed by a very encouraging group discussion, Schlegel Villages’ leadership team agreed to transform their 2010 operational planning retreat into a 3-day ‘AI summit’; the outcome of which would be a set of aspirations, based on Schlegel Villages’ strengths, to guide the organization to a more ideal future.

In light of this decision, it was time to make some plans. Again, AI is all about collaboration and widespread participation from all community members. And so, as a large organization which, at that time, had grown to 11 villages, with 2500 residents and 2500 team members, we had to thoughtfully strategize how to create opportunities for meaningful engagement in all aspects of this AI culture change process. Wanting to honour the wisdom of village members, we decided to form an ‘advisory team’ to guide our efforts.



Action 3.2: Identify and invite a diversity of organization members to serve on an advisory team

Schlegel Villages developed an advisory team (the Support Advisory Team or SAT) comprised of diverse representatives from all 11 villages and the support office to guide our culture change process. Because Schlegel Villages’ culture change journey was the subject of Jennifer’s doctoral research, she served as the chair of this collaborative body from 2010-2013. From a research perspective, members of the SAT were her primary research partners. From a culture change perspective, the SAT was (and still is!) the guiding force of our culture change efforts. Its members serve as wise counsel to the support office team and offer their insights and recommendations as to the flow, intensity, and demands of the culture change process at an organizational level.

Connected to the SAT, each village has a Village Advisory Team (VAT) that controls the flow, intensity, and demands of the culture change process at a village level. We will soon describe this evolution in our journey and the relationship between the SAT and VATs, but, first, it is important to clarify a few things about the purpose and function of an advisory team.

Within a collaborative culture change process, the advisory team does not stand in a closed and exclusive position of superiority in relation to other people and groups within the organization. Instead, it is an open group which provides an inclusive space for even broader engagement, discussion, and shared decision-making with village members who are not part of the advisory team. The idea is to foster 'collective capacity building' within the culture change context (Kemmis and McTaggart, 2005). In other words, the purpose of the advisory team is to identify and support ways for all village members to work together in the effort to develop and move the culture change agenda forward.

Today at Schlegel Villages, the SAT operates at an organizational level and coordinates with 14 VATs at the village level (the number of villages is now up to 14). Regardless of the number of advisory teams within your organization, the role of the advisory team(s) is to foster individual and collective empowerment through inclusive discussions and shared decision-making.

In forming an advisory team, it is important to have diverse perspectives represented. Initially, Schlegel Villages' SAT consisted of 19 representatives from the villages and support office (see Exhibit 3.2). Over the years, it has grown to 30 members, providing greater representation from across the organization.

Exhibit 3.2: Schlegel Villages' SAT members by role



	<i>Summer 2010</i>	<i>December 2013</i>
<i>Residents and family members:</i>		
LTC Residents	2	1
Retirement Living Residents	1	4
Family Members	2	1
<i>Direct support team members:</i>		
Cooks	0	1
Housekeepers	0	1
Personal Support Workers	2	2
Recreation Therapists	1	2
Registered Practical Nurses	1	0
Administrative Coordinators	0	1
Directors of Food Services	2	2
Directors of Recreation	0	4
General Managers	2	2
Neighbourhood Coordinators	1	4

Continued on next page

	Summer 2010	December 2013
Researchers		
Researchers	1	1
Vice President, RIA	1	0
Research Application Specialist	0	1
Associate Director, Schlegel CLRI	0	1
Support office		
Support Office Consultants	3	2
Director of Operations	0	1
TOTAL	19 members	30 members

At first, representation on the SAT was not as balanced as we desired, in part because of the manner in which we identified and invited members. Our recruitment strategy was not much of a strategy. We simply asked all of the GMs to send 1 or 2 village members to a 3.5-hour information meeting about joining the SAT. We asked the GMs to identify village members who:

1. exemplified a resident-centred approach;
2. were champions of change (e.g., culture change or quality improvements); and
3. were effective communicators who would share information from the meetings with other village members upon their return.

While all of the GMs sent village members who fit this description, what we failed to consider in our request was the attitude in which the village members approach matters of change. While most of the potential recruits were positive and optimistic, a few were skeptical, but interested, while others were very critical, at least in the beginning. So the village members who came to the information meeting were diverse in terms of attitude, but all committed to the idea of change.



Now it is your turn to consider how you will form an advisory team to guide your journey. Please see Appendix 8 for a worksheet to help you and your learning partners think through who to invite to serve on the advisory team, how best to recruit potential members, and how the team should be structured and operate to best serve your journey.



Action 3.3: Teach potential advisory team members about culture change and Appreciative Inquiry

In August 2010, we held a meeting to teach potential SAT members about culture change and AI, and to engage them with AI and each other through ‘mini-appreciative interviews’ (i.e., interviewing a partner using AI-type questions). We also reviewed and sought feedback on a first draft of the schedule and agenda for the upcoming AI summit (more on this in Action 3.6).

SUCCESSES

After one year of serving on the SAT, one family member stated that he went from feeling very angry with the team members who worked at his father's village and frustrated with the organization in general, to wanting to be the first person on the waiting list for the village's new retirement living community!

It was a long but engaging meeting, and at its conclusion everyone agreed to join the SAT. In the months and years that followed, some SAT members confessed to Jennifer that they did not really understand everything she had presented in that initial meeting – there was too much jargon and too many new ideas – but they appreciated her passion, agreed change was necessary, and even those members who were initially skeptical and/or critical agreed that they wanted to be part of the process.

NEXT STEPS

Using Appendix 9 as your guide, plan an information meeting of your own to teach potential advisory team members about culture change and AI.



Action 3.4: Teach advisory team members about authentic partnerships

In the second meeting of the SAT, the group was introduced to the concept of authentic partnerships.

As chair of the SAT, Jennifer's thinking about 'participation' was greatly influenced by her previous work co-developing a framework for understanding and mobilizing 'authentic partnerships in dementia care' (Dupuis, Gillies, Carson, Whyte, Genoe, Loiselle, & Sadler, 2012). Building on the principles and practices of relationship-centred care (Nolan, Davies, Brown, Keady, & Nolan, 2004), and integrating understandings from several participatory projects conducted by the Murray Alzheimer Research and Education Program (MAREP) at University of Waterloo, Jennifer and a group of other doctoral students and community partners, led by Dr. Sherry Dupuis (Jennifer's doctoral supervisor), reflected on their respective practice backgrounds and experiences and worked collaboratively to identify principles and enablers of authentic partnerships (see Exhibit 3.4).

Exhibit 3.4: Summary of authentic partnerships (adapted from Dupuis et al., 2012)



Authentic Partnerships	
Guiding Principles:	
Genuine regard for self and others	<ul style="list-style-type: none"> • 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

Continued on next page

<i>Authentic Partnerships</i>	
Guiding Principles (Cont'd):	
Synergistic relationships	<ul style="list-style-type: none"> • Developing relationships that are characterized by interdependence and reciprocity • Including a diversity of community members, where all voices are equally valued • Building on the diversity of the group; incorporating the gifts of each partner
Focus on the process	<ul style="list-style-type: none"> • Staying flexible and responsive to change • Remaining open to learning from mistakes • Embracing creativity and non-traditional ways of doing things
Enabling Factors:	
Connecting and committing	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 critical reflection and dialogue	<ul style="list-style-type: none"> • Provide opportunities for self, and group, reflections and dialogue • Regularly ask how our approach is contributing towards building authentic partnerships

These principles and enablers, originally developed to support the inclusion of all partners within a dementia context in decision-making, hold great potential when applied to a collaborative culture change journey.

After SAT members learned about the principles and enablers of authentic partnerships, the group engaged in discussion to collaboratively reflect on how to support each member's participation and strengthen the team as a whole.



Please see Appendix 10 for a list of reflection questions that can be used to guide this discussion. We recommend this as a major agenda item in an early meeting of your advisory team (second or third meeting). It is also helpful to return to these reflection questions over time, in an effort to conduct regular critical reflection on your collaborative process.

Collaboration takes time, a lot of time. With this in mind, there was one principle of authentic partnerships that as chair of the SAT, Jennifer said she reflected on continually: focus on the process (not on the outcomes). This was important to committee members, as reflected in this comment:

The meetings were planned in such a way that the focus of the day was not getting through content but rather actually engaging in meaningful discussions that I found extremely helpful. We could talk about things as long as we needed to talk about them and explore them again further as a group.

(Anneliese Krueger, GM, Interview, March 16, 2014)



Action 3.5: Collaboratively develop guiding principles

As a part of supporting authentic partnerships on the SAT, members worked collaboratively to develop a set of guiding principles (see Exhibit 3.5) to guide their work together. Guiding principles describe how we agree to treat each other and how we can expect to be treated. To this date, at the beginning of each meeting, SAT members read the guiding principles aloud and, often, have an ice-breaker or warm-up activity that incorporates them in some way.

Exhibit 3.5: Schlegel Villages' SAT guiding principles

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

I think the [SAT] experience was pretty incredible. At the end of the day when you think about it, there is a lot of power behind each individual village having representation at the table. At the end of the day, it doesn't matter who you are in terms of the constituent at the village, but anybody who is impacted in village life has the opportunity to come together and be a part of helping to shape the journey. And for us as an organization, everybody is 'hands on' and there were no positions, there were no titles, there was, at the table, just a group of individuals who genuinely were interested in pursuing, to quote Jim Collins, some big, very audacious goals. And it was powerful because at the end of the day they were helping to provide direction and support, helping to shape the future of the organization and I can't think of too many experiences where people have had the opportunity to be a part of such a thing.

(Paul Brown, Director of Operations, Interview, March 31, 2014)

Well, and this might not sound good, but you end up on a lot of committees and there's non-stop meetings, but after every SAT meeting, I'd go, 'Well I'm sticking with this one because this is the best one of all!' because of the stuff that would come out, because it really shows how all levels are affected by things. You don't often get that.

(Brad Lawrence, GM, Interview, March 14, 2014)



Now it is your turn to develop guiding principles! Please use Appendix 11 to help guide this process during one of your advisory team meetings.



Action 3.6: Plan an Appreciative Inquiry summit

At Schlegel Villages, a detailed agenda and handout for each of the 3 days of the AI summit was presented to SAT members for review and revision. The agenda for the summit is included in Appendix 12, and Steps 5-7 describe the summit in greater detail. Members were also encouraged to sign up as co-facilitators of the AI summit, demonstrating this was a collaborative endeavour. In total, 16 team members agreed to co-facilitate a portion of the agenda, most of whom were also SAT members, and the 2 family members and 3 residents on the SAT agreed to serve on panels on the first day of the AI summit, along with others.

As described in Step 2, each year Schlegel Villages holds a 3-day operational planning retreat for leadership and direct support team members from each village. In 2009, this event was focused on collaborative reflection and awareness-raising. In 2010, this event was transformed into a 3-day AI summit which was attended by 180 team members. Recognizing that this was only a fraction of the total team members (2500), residents (2500) and family members, we provided an opportunity for all village members to engage in the AI process through appreciative interviews conducted at each village prior to the summit.



We will describe more about appreciative interviews in Step 4, but for now, please review the agenda we developed (Appendix 12) to give you some inspiration about how you might structure your AI summit. Keep in mind; you will need to tailor the design of your summit to best meet the needs of your organization.



Step 4: Mobilize an Organization-Wide Inquiry

Before the Appreciative Inquiry summit, mobilize an organization-wide inquiry into the organization's positive core, inviting all community members to participate

- Action 4.1:** Prepare for appreciative interviews
- Action 4.2:** Identify and train appreciative interviewers
- Action 4.3:** Advertise and promote appreciative interviews
- Action 4.4:** Hold appreciative interviews
- Action 4.5:** Analyze and summarize the discoveries

Resource materials for Step 4 are provided in Appendices 13 – 17.



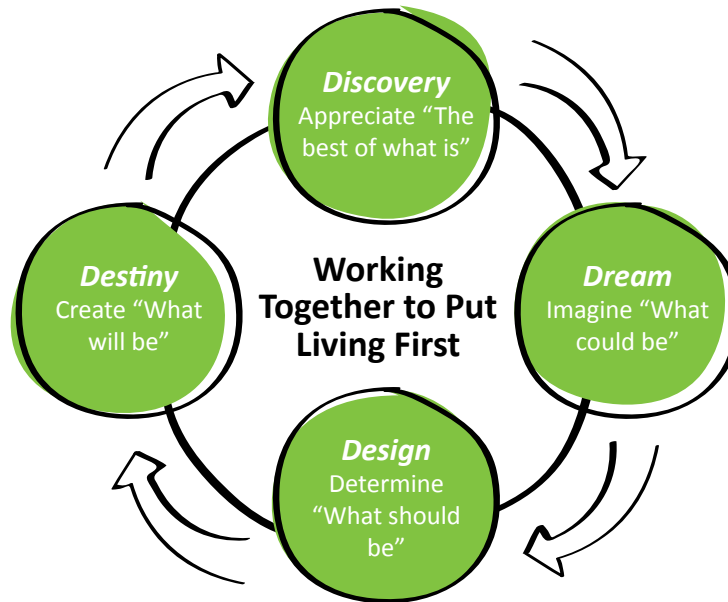
Step

4

Mobilize an Organization-Wide Inquiry

Introduction

You learned in Step 3 about the four cycles or 'D's' of AI: *Discovery*, *Dream*, *Design*, and *Destiny*:



As a large organization with (at that time) 2500 residents and 2500 team members, we had to thoughtfully strategize about how to create opportunities for meaningful engagement in all aspects of our AI culture change process, beginning with the first cycle in the process, *Discovery*.

The primary aim of the *Discovery* cycle is to discover an organization's 'positive core'. The positive core is "that which makes up the best of an organization and its people" (Cooperrider, Whitney, & Stavros, 2008, p. 437). It consists of those qualities, attributes, strengths, and assets that already exist within the organization, and can be uncovered through conversation and dialogue with as many community members as possible, and by asking them positive questions, such as:

- Tell me about a peak experience or highpoint story in your professional life... a time when you felt the most alive, most engaged, and really proud of yourself and your work.
- 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?
- If you had a magic wand, and could have any three wishes granted to heighten the health and vitality of this organization, what would they be? (Whitney & Trosten-Bloom, 2003, p. 140)



These ‘core’ questions can be revised and tailored to any particular organization and/or topic. The important point is that every question is positive. Asking people positive questions strengthens our capacity to understand and lean into our positive potential for change. Instead of fixing what is wrong, we can strengthen and build on the best of ‘what is’. But first we have to discover what that is; we must discover our positive core. Step 4 will help guide the way.



Action 4.1: Prepare for appreciative interviews

At the heart of the *Discovery* cycle of the AI 4-D Process is the appreciative interview in which positive questions are asked and explored. Appreciative interviews can take a variety of shapes (e.g., individual or group interviews, etc.). According to Whitney and Trosten-Bloom (2003), appreciative interviews are often described as “informative, enlightening, and inspiring. People remember times when they are at their best, then recognize they share similar dreams for their organization” (p. 141). As more and more people respond to the positive questions and common themes are discovered, “individual appreciation becomes collective appreciation, individual will evolves into group will, and individual vision becomes a cooperative or shared vision for the organization” (Cooperrider, Whitney & Stavros, 2008, p. 6).

At Schlegel Villages, the 3-day AI summit was a pivotal event in our culture change journey. In the AI summit design, the first day was devoted to the *Discovery* cycle of the AI process. But all Village members could not directly participate because it was logistically impossible to physically gather everyone in a single room at a single point in time. So we came up with a solution. We conducted appreciative interviews in each village with as many organization members as possible and then brought our discoveries to the AI summit.

We developed positive questions that would elicit village members’ best stories related to living, working or spending time within their village. Specifically, these positive questions would help us discover and better understand: 1) our positive core; 2) our individual and collective strengths and contributions; and 3) our images for an ideal future.

We tried wording each question in the most accessible way so every village member could relate and respond. As we came up with different options, we tested them out on each other by doing appreciative interviews in pairs. Then we reported back on our experiences. After a few revisions and re-tests, we were well satisfied with the following three questions:

1. 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?
2. What strengths or contributions do you bring to your village?
3. Take a moment to dream and visualize the village you really want. What does this dream look like? What is happening? What three things would help us create this future?



According to AI experts, your positive questions should include the following:

- Backward questions invite us to remember high-point experiences – times when we have felt most alive and most present, either within the organization or elsewhere (e.g., Tell me about a peak experience or highpoint story in your professional life... a time when you felt the most alive, most engaged, and really proud of yourself and your work)
- Inward questions refer back to those high-point experiences, asking us to make meaning of those peak experiences, and to extrapolate learnings about their root cause of success (e.g., What are the core factors that give life to this organization, when it is at its best?)
- Forward questions solicit our hopes, dreams, and inspirations. They encourage us to imagine futures in which life is the best it can possibly be (e.g., If you had a magic wand, and could have any three wishes granted to heighten the health and vitality of this organization, what would they be?)
- Transitional questions also invite the interviewee to consider first steps and transitions from the current reality to the imagined future (e.g., What is one thing we could do to make one of your three wishes come true?) (Whitney & Trosten-Bloom, 2003, p. 152-153).

In addition to positive questions, Whitney and Trosten-Bloom (2003) also suggest developing a lead-in statement to introduce interviewees to the affirmative topic of the inquiry:

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 questions, 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. Here is an example of a lead-in statement developed collaboratively for the *Discovery* cycle at Schlegel Villages, based on the topic of our inquiry, Working Together to Put Living First:

Because an appreciative approach is so different from a traditional problem-solving approach, a brief introduction might be helpful. First, this approach, called Appreciative Inquiry (AI), is not meant to avoid or ignore problems. 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 village you really want. What does this ideal village look like? What is happening? What 3 things would help to create this future?" A person could respond something to the effect of, "My ideal village would have: 1) more team members and smaller resident-to-team member ratios; 2) more time to spend meaningfully with residents; and 3) no uniforms." This is just one example of how to reframe possible problems as opportunity areas.

With AI, the art of asking positive questions strengthens our capacity to anticipate positive potential toward change. The positive questions I am about to ask you are designed to draw out village members' best stories related to working, living or spending time within the village. These stories can help ignite positive energy and enthusiasm for change as we move toward a more ideal future. The common themes that emerge from these stories represent our collective experiences and will contribute to the identification of Schlegel Villages' '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 us into the future, provide continuity, and act as a source of pride and confidence for each village member.

In addition to sharing this lead-in statement verbally at the appreciative interviews, we also planned to display Exhibit 4.1 on flipchart paper to provide some additional context for the AI process.

*Exhibit 4.1: Traditional problem solving vs. Appreciative Inquiry
(adapted from Cooperrider & Srivasta, 1987)*



<i>Traditional Problem Solving</i>	<i>Appreciative Inquiry</i>
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

One concern often raised and addressed about AI involves reactions and misunderstandings about its positive approach; namely, that it leaves no room for negative responses. Yet, problems are often much easier to address when people take an appreciative stance. As Kotellos, Rockey, and Tahmassebi (2005) explain:

[In the interview processes]...it was clear that reframing questions [positively] did not necessarily halt negative responses. When individuals had a desire to share a negative response, they found a way to do it. Appreciatively worded questions enabled people to address problems, but from a more constructive, solution-focused perspective. (p. 19)

In short, AI can be seen as an approach that makes potentially difficult discussions more open and possible (Reed, 2007). This was definitely our experience with the appreciative interviews. Our interviewees reported the discussions were energizing and made people feel proud to be a part of our organization. We hope your experience is similarly positive!



Now it is your turn. Using the worksheet in Appendix 13, develop your positive questions, test them, and develop a lead-in statement.



Action 4.2: Identify and train appreciative interviewers

Once we developed our positive questions and lead-in statement, our next step was to identify and train a team of appreciative interviewers. This was an easy task. We focused more on the individual's interest and willingness to serve than on their formal interviewing experience. We welcomed anyone who wanted to serve in the role, realizing it would be a rewarding and educational experience.

In total, we enlisted a team of 22 volunteer interviewers, several of which were from our SAT.



Now it is your turn. Please see Appendix 14 for a participant worksheet to guide discussions with your advisory team about identifying volunteers to conduct your appreciative interviews.



After recruiting volunteers, it was time to train them. A facilitation guide was created to help volunteers navigate the appreciative interview process. Appendix 15 and 16 contain guides for facilitating appreciative interviews with residents/family members and team members, respectively.



Action 4.3: Advertise and promote appreciative interviews

Once we developed positive questions and a lead-in statement, and identified and trained interviewers, it was time to communicate our inquiry strategy with the broader organization.

Broad-based organizational support is a significant predictor of the success of an AI initiative. Communication at all stages of the process breeds high levels of involvement, commitment, and learning – which in turn translate into support. Without extensive communication, even AI can be perceived as something that ‘they’ are doing. Organizations can only create full-voice, knowledge-based, narrative-rich cultures through open, inclusive, and extensive interactive communication (Whitney & Trosten-Bloom, 2003).

We heeded the advice of AI experts who suggest these introductory communications provide broad, rather than deep, information about the initiative. Here's some information that you might want to include, without overwhelming people with information:

- The purpose of the appreciative interviews
- The questions that will be posed
- Who can participate in the interviews
- Who will conduct the interviews
- When and where the interviews will take place
- Who will have access to the data
- What will happen with the data
- How participants can sign up, show up and/or participate



At Schlegel Villages, our communication strategy included:

- Hand-delivered postcard invitations
- Posters/flyers
- Newsletter articles
- Inclusion in monthly resident activity calendar
- Presentations at team meetings



Now it is your turn. Please see Appendix 17 for a worksheet to begin planning your communication strategy.



Action 4.4: Hold the appreciative interviews

At Schlegel Villages, after communicating our inquiry strategy to the villages, 2-3 of our 22 appreciative interviewers visited each village, as scheduled and advertised, for an entire day of appreciative interviews, providing residents, family members and all three shifts of team members with an opportunity to participate and contribute to our AI process. On average, each appreciative interviewer interviewed 20 village members for a total of 440 respondents.

Now you are ready to hold your own appreciative interviews, good luck!



Action 4.5: Analyze and summarize the discoveries

The appreciative interviewers took notes during each individual interview (as outlined in Appendices 15 and 16). Then, at the conclusion of the day, all of the interviewers at that one village sat down together to share their discoveries. Each group of interviewers identified and recorded highlights and key themes for each positive question, for each community group (i.e., residents, family members, and team members), and included supporting quotes to help illustrate or describe key themes.

After completing a master summary for all of the interviews, each team made 2 copies and shared one with the host village's GM and leadership team during an exit/debriefing meeting and emailed the second summary to Jennifer, who analyzed and synthesized all of the village summaries into an organizational summary of team member discoveries, which was presented on the first day of the AI summit. Exhibit 4.5 presents a list of Schlegel Villages' key discoveries from the appreciative interviews with team members at the villages. A similar summary was made for resident and family member interviews.



Exhibit 4.5: Village appreciative interview discoveries from team members




<i>Our Positive Core</i>	<i>Our Strengths and Contributions</i>	<i>Our Images of an Ideal Future</i>
<ul style="list-style-type: none"> • Teamwork • Recognition/feeling valued • Opportunities to grow and develop • Strong, mutual relationships • Mission, vision, values, and leadership • Shared, meaningful activities • Resident-centred focus • Environmental design • Spirit of innovation • Special events 	<ul style="list-style-type: none"> • Teamwork • Positive attitudes • Dedication and caring toward residents • Hard-working • Flexibility and openness to new ideas • Organized • Resident-centred • Good communication 	<ul style="list-style-type: none"> • Resident-directed services and care (e.g., flexible meals, natural wake-up, customized menus and routines) • Know and develop a strong relationship with each resident • More time for one-to-one interactions with each resident • Meaningful choices and variety • Meaningful activities (e.g., shared, spontaneous, community, and one-to-one) • Home environment (e.g., no call bells or overhead pages) • Accessible, attractive, landscaped outdoor areas and gardens

Testimonial from a Schlegel Villages team member

I never lost a moment's sleep or I never felt a twinge of anxiety to be totally honest with you. I was more excited about what we would be able to fashion together with everyone's best thinking than I was about, 'Are we going to come up with something that's totally off the wall that I can't support?' I just trusted the wisdom of our team members... You won't be successful without those folks fully engaged, so you have to have an intrinsic trust in the talent and wisdom of your direct support team. I won't get the quote entirely right, but it's a 19th century quote, so forgive the sexism in it, but it's something like 'Trust in men and they will be true to you; trust them greatly and they will show themselves great.' In other words, if we can, it's a bit of a self-fulfilling thing, if you trust your team greatly they'll prove themselves great. That's what happening in the villages.

(James Schlegel, President, March 31, 2014)

We hope that you find the information gathered from your appreciative interviews as valuable as we did. In the next step, we will describe how we drew on these learnings during Day 1 of the AI summit!



Step 5: Identify the Organization's Positive Core

On the first day of the Appreciative Inquiry summit,
compare organization-wide discoveries with personal discoveries
to identify the organization's positive core

- Action 5.1:** Introduce Appreciative Inquiry and the 4-D process (*Discovery, Dream, Design, and Destiny*) to Appreciative Inquiry summit participants
- Action 5.2:** Discover the organization's positive core from the perspectives of team members
- Action 5.3:** Discover the organization's positive core from the perspectives of residents and family members
- Action 5.4:** Draw on key discovery themes to identify the organization's positive core

Resource materials for Step 5 are provided in Appendix 18.



Step

5

Identify the Organization's Positive Core

Introduction

The AI summit is aligned with the 4-D cycles of AI. A general outline for Schlegel Villages' AI summit is included in Exhibit 5.0A (Cooperrider et al., 2008; Ludema, Whitney, Mohr, & Griffin, 2003).

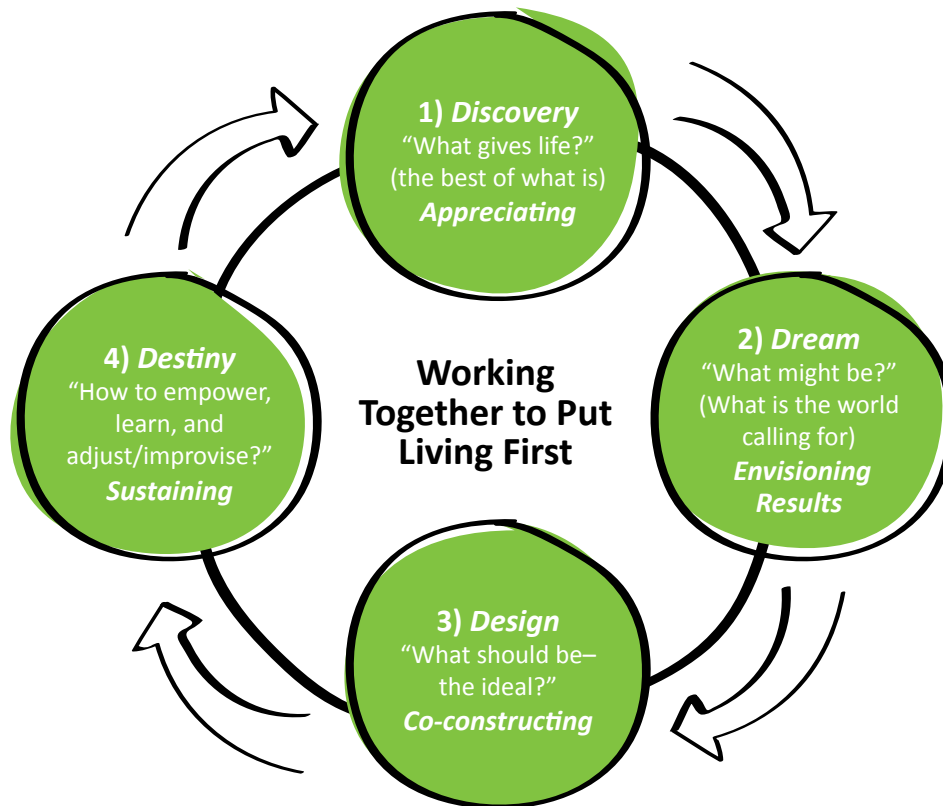
Exhibit 5.0A: The general outline of the Appreciative Inquiry summit mapped against the 4-D Appreciative Inquiry process



Day Cycle	Focus	Participants...
Day 1 Discovery	Mobilize a systemic or system-wide inquiry into the positive change core	<ul style="list-style-type: none"> Engage in appreciative interviews Reflect on interviews completed before the AI summit Identify highlights and key themes
Day 2 morning Dream	Envision our greatest potential for positive influence and impact for residents, families, and team members	<ul style="list-style-type: none"> Share dreams collected during <i>Discovery</i> cycle Create and present dramatic enactments of dreams Identify actionable ideas Create aspiration statements incorporating the positive change core
Day 2 afternoon and Day 3 Design	Craft an organization in which the positive change core is boldly alive in all strategies, processes, systems, decisions, and collaborations	<ul style="list-style-type: none"> Use aspiration statements as the foundation for operational plans Identify ways to collaborate and gain feedback on operational plans at your communities
Back at your communities Destiny	Invite action inspired by the days of <i>Discovery</i> , <i>Dream</i> , and <i>Design</i>	<ul style="list-style-type: none"> Publically declare and gain feedback on intended actions Ask for collaboration and support Plan next steps

Step 5 describes Day 1 of the AI summit, focusing on the *Discovery* cycle of the 4-D process (depicted in Exhibit 5.0B).

Exhibit 5.0B: The Appreciative Inquiry 4-D process



For this summit, we suggest gathering residents, family members and team members from all levels across your organization. In our case, over 180 team members attended, and residents and family members were involved in a panel discussion. As you will remember from Step 4, we also sought feedback from additional village members (approximately 440 in total) using appreciative interviews at each village.



Appendix 18 includes a facilitator guide with instructions for Day 1 of the summit and matches the activities described in Actions 5.1-5.4. This guide is based on our experience; feel free to revise it to suit the needs of your summit.



Action 5.1: Introduce Appreciative Inquiry and the 4-D process (Discovery, Dream, Design and Destiny) to Appreciative Inquiry participants

We started Day 1 of the summit with a brief presentation about AI. We asked participants to listen to the description below (Exhibit 5.1A), and to underline ideas that were meaningful to them on the handout we provided. We then invited participants to share the words or phrases that resonated most with them.

Exhibit 5.1A: Description of AI provided to participants on day 1 of the summit

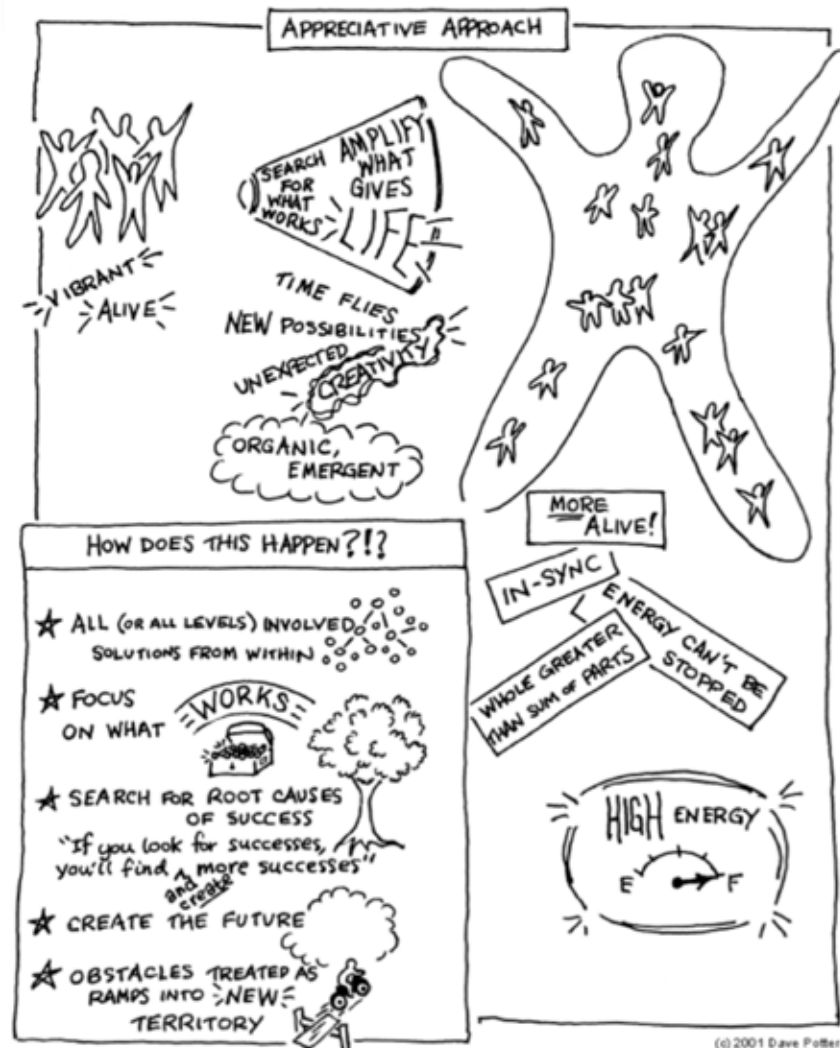
“Appreciative Inquiry (AI) is the cooperative search for the best in people, their organizations, and the world around them. It involves systematic discovery of what gives a system ‘life’ when it is most effective and capable in economic, ecological, and human terms. AI involves the art and practice 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 and criticism 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)

Next we invited participants to quietly view and interpret the illustrations that visually contrast a traditional approach to culture ‘change’ (Exhibit 5.1B) with an appreciative approach to culture ‘enhancement’ (Exhibit 5.1C).

Exhibit 5.1B: A traditional approach to culture ‘change’



Exhibit 5.1C: An appreciative approach to culture 'enhancement'



Images available from: <http://appreciativeinquiry.case.edu/practice/toolsModelsPPTsDetail.cfm?coid=845>

Then, at tables of 8 – 10 people, we discussed the following questions:

- How do the illustrations relate to your culture change experiences to date?
- Which approach would you rather participate in, and why?

Throughout this discussion, we emphasized 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. We also discussed how AI might support and strengthen our continuing efforts to move toward a social model of living (vs. an institutional model of care).



Action 5.2: Discover the organization's positive core from the perspective of team members

The remainder of Day 1 focused on the *Discovery* cycle, which involved discovering our positive core from the perspectives of team members, residents, and family members. Again, at the



The positive core is made up of those qualities, attributes, strengths, and assets that already exist within the organization and help to guide us into a more ideal future.



heart of this process is the appreciative interview (which you will remember from Step 4 when we sought to engage village members organization-wide). This process involves asking positive questions designed to draw out 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.



For these interviews, each participant found a partner at their table and they took turns interviewing each other using the questions below. These are the same questions that were used in the appreciative interviews prior to the summit:

1. 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 working there. Describe it. What factors made it meaningful? What came together to make it happen?
2. What strengths or contributions do you bring to your community?
3. Take a moment to dream and visualize the community you really want. What does this ideal community look like? What is happening? What three things would help to create this future?

Each interview lasted approximately 10 minutes. During the interview, the facilitator took brief notes using the template we provided.

Once these one-on-one interviews were completed, with each pair having a chance to be both the interviewer and interviewee, highlights were shared with other team members at each table. Each person introduced their interview partner and briefly shared highlights from his/her highpoint story (question 1); the best qualities he/she sees in him/herself (question 2); and key themes regarding hopes for the future (question 3).

With the help of a recorder, one of which volunteered at each table, the groups of team members identified 2 or 3 highlights or key themes (briefly stated) for their table in each of the following categories, 'Our Positive Core' (question 1), 'Our Strengths and Contributions' (question 2), and 'Our Ideal Future' (question 3). These were recorded on the template we provided.

At this point in the day, it was important to include the input from those team members who were not able to attend the AI summit. In order to ensure that their voices were heard, we summarized in a brief presentation the highlights and key themes from the team member interviews conducted across the organization prior to the AI summit (described in Step 4).

We then invited tables to discuss the following question:

- How do these findings compare with the highlights and key themes identified at your table?

At their tables, participants compared and contrasted findings from team member interviews with the highlights and key themes discovered at their table. In light of this data, each table collectively selected 2 or 3 of the most important highlights or key themes and recorded them on coloured post-it notes. Each post-it was posted to the wall under one of the corresponding banners: 'Our Positive Core', 'Our Strengths and Contributions', or 'Our Ideal Future'.



Action 5.3: Discover the organization's positive core from the perspective of residents and family members

By now you know that we were committed to engaging in, and supporting, a collaborative culture change process that included team members from across the organization, but also included residents and family members in discovery and decision-making as we continued our evolution toward a more ideal social model of living. One way we did this was to hear directly from several residents and family members via 2 panel discussions.

During the panel discussions, residents and family members shared their perspectives on our positive core, our strengths and contributions, and their hopes for an ideal future. This was a powerful experience for everyone involved, with highlights and key themes being recorded by everyone in attendance as they listened and asked questions of the respective panels.

Following the resident and family panels, groups at each table selected a discussion leader, timekeeper and recorder. Each team member briefly shared what he or she perceived as a few highlights or key themes from the resident and family panels. As each team member shared, the recorder listened for any patterns and common themes and with the help of the group, identified 2 or 3 highlights or key themes for their table in the areas of 'Our Positive Core', 'Our Strengths and Contributions', and 'Our Ideal Future'.

Summaries of the family member and resident appreciative interviews completed prior to the summit were then distributed to participants by each village's GM. At their tables, participants

Testimonial from a Schlegel Villages team member... on the importance of engaging residents and family members in the culture change process

I mean this is very personal, and I'll share this with you, but there'd be those moments just before sessions we were having that involved family members and residents, I'd be standing at the back of the room going, 'This could go really badly,' and then it'd be over and I'd go, 'What was I so afraid of?'. And I think that wasn't unique to me. I think for many leaders we had to move through kind of a fear phase that said 'The reason we hadn't had people involved in this stuff in the past is because people could say anything, and there could be all kinds of crazy outcomes, and this could just totally get out of control.' You have that moment, but then you think through it and at the end of it, or as you're watching it unfold, and you have that realization that my fear was unfounded. And I think that's part of the journey too.

(Bob Kallonen, Chief Operating Officer, March 14, 2014)

compared and contrasted findings from their village with highlights and key themes from the resident and family member panels at the summit. Then, in light of this new data, each table collectively selected 2 or 3 of the most important highlights or key themes in each of the 3 areas. Then, the recorder wrote their selected themes on the coloured post-it notes and posted each one to the wall under the corresponding banner.



Action 5.4: Draw on key discovery themes to identify the organization's positive core

By the end of Day 1 of the AI summit, the walls were covered with our discoveries. Participants took time to take a gallery tour of all of the highlights and key themes on the walls. A data analysis team comprised of SAT members then collected and synthesized the data under each banner to summarize the key themes in each area. Exhibit 5.4 depicts a summary of our discoveries. These key themes would be used as building blocks during Day 2 of the summit, in which we started to collaboratively dream about a more ideal future.

Exhibit 5.4: Discovery themes from day 1 of the Appreciative Inquiry summit

Our Positive Core

- Teamwork
- Strong Relationships
- Resident-Centred
- Meaningful Activities
- Family and Community Involvement
- Innovation and Creativity
- Recognition and Feeling Valued

Our Strengths and Contributions

- Positive Attitude
- Teamwork
- Resident-Centred
- Compassion
- Innovation and New Ideas
- Hands-On Approach

Our Ideal Future


- Quality 1:1 Time with Residents
- Resident Empowerment
- Meaningful and Shared Activities
- Flexible Routines
- Resident-Centred
- Strong Relationships



Interestingly, a few themes emerged in more than one area demonstrating connections between the best of 'what is', current strengths that exist and features of an ideal future. These connections helped ground our dreams in reality, giving a sense that our dreams are not pie-in-the-sky but completely achievable (Cooperrider et al., 2008). For instance, the key theme of 'resident-centred' appeared under all three thematic areas meaning that a resident-centred approach already existed within Schlegel Villages, albeit to a lesser extent than it exists today, and it was also considered an essential quality of an ideal future.



Now it is your turn. Adapt and use the facilitator guide in Appendix 18 to plan and deliver Day 1 of your AI summit.



Step 6: Dream about an Ideal Future

On the second day of the Appreciative Inquiry summit, draw on the discovery of the organization's positive core to envision its greatest potential for positive influence and impact:

- Action 6.1:** Present and discuss the organization's positive core
- Action 6.2:** Dream about an ideal future
- Action 6.3:** Create dramatic enactments to represent these dreams
- Action 6.4:** Generate actionable ideas and identify opportunity areas for future growth

Resource materials for Step 6 are provided in Appendix 19.



Step

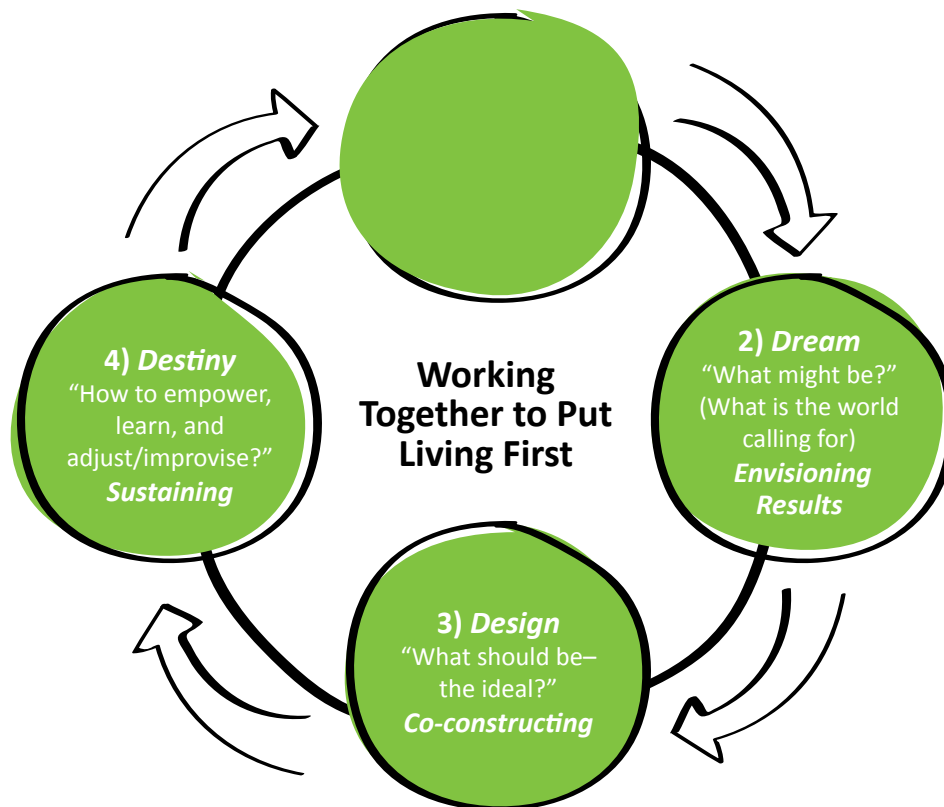
6

Dream about an Ideal Future

Introduction

Step 6 describes the morning of Day 2 of the AI summit, focusing on the *Dream* cycle in the AI 4-D process (depicted in Exhibit 6.0).

Exhibit 6.0: The Appreciative Inquiry 4-D process



Once we have discovered and identified the best of 'what is' (Step 5 and Day 1 of the AI summit), the *Dream* cycle of the AI 4-D process invites us to envision what LTC and retirement living could be. 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 and community members. 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 community members. (p. 44)



Appendix 19 includes a facilitator guide with instructions for the morning of Day 2 of the summit and matches the activities described in Actions 6.1-6.4. This facilitator guide is based on our experience; feel free to revise it to suit the needs of your summit.



Action 6.1: Present and discuss the organization's positive core

At Schlegel Villages' AI summit, by the end of Day 1, the walls were covered with our discoveries and a data analysis team comprised of seven SAT members analyzed all of the themes on the wall and identified the strongest themes in each area (see Exhibit 5.4 in Step 5).

We kicked off the second day of the AI summit by sharing these themes with participants on slides and in a handout for each person. We then took some time to discuss each theme and identify examples.

Although you don't need to spend a lot of time on this (we took 15 minutes), it is important to start Day 2 with a collective understanding of your organization's positive core. Everyone will need these themes 'top of mind' as we dream about a more ideal future.



Action 6.2: Dream about an ideal future

After celebrating the best of 'what is' at Schlegel Villages, our next action was to dream about 'what could be' if we were to build upon and maximize our discoveries. This involved 2 specific activities. First, one of our AI summit facilitators engaged team members in a simple imagery exercise (described in detail in Appendix 19):

Please close your eyes. Imagine that it is now the year 2015 and upon returning to your village you are both amazed and delighted by what you see. Visualize the village you really want. What is happening? What do you see, feel, sense, or hear? Focus and get a really clear picture.

The facilitator asked everyone to open their eyes and jot down a description of what they envisioned. Next, they were asked to write their response to the following questions:

1. What do you think would need to happen in order for this change to come about?
2. What is one thing that we can do today to support this vision?

By now participants should have a dream, a vision for a more ideal future. The next action is to share these dreams with everyone at the summit and collaboratively build on our positive core as we dream together.





Action 6.3: Create dramatic enactments to represent these dreams

Once team members had a chance to envision a more ideal future at Schlegel Villages, it was time to engage participants in a creative enactment activity (i.e., a skit). Participants were asked to get into their village teams, and move to an assigned breakout room. The following instructions were provided to each team (described in detail in Appendix 19):

1. Select a discussion leader, timekeeper, and recorder.
2. Share your hopes and aspirations for your village five years into the future.
3. Brainstorm a list of themes or opportunities related to your visions.
4. Review key themes from yesterday's *Discovery* cycle.
5. Through dialogue, choose three to five key themes or ideas regarding your village's ideal future.
6. Collaboratively develop a 4-minute creative enactment to convey your shared images of your village's 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.
7. You have 45 minutes to prepare. Performances will begin at (such and such time) in the main room.

Once all of the villages returned to the main room, 2 facilitators hosted an hour of performances from each team. The teams were highly creative and delivered some outstanding performances – some that made us laugh, some that made us think critically, and some that touched us in a quiet, reflective, yet powerful way. As each village performed, team members were asked to watch and listen closely for common themes and ideas which were then used in the next action.

Pictures from some of our creative enactments on Day 2 of the AI summit:





Action 6.4: Generate actionable ideas and identify opportunity areas for future growth

In this action, we move from dreams to possibilities. Following the dream enactments, the facilitators asked each team to return to their breakout room and generate 2 actionable ideas that they felt could help us in achieving our dreams (e.g., flexible dining, resident-directed schedules, interdisciplinary teams, etc.). After discussion, all the village teams returned to the main room to present their ideas in a large group format. A representative from each team posted their 2 actionable ideas on the wall. Instructions for orchestrating this activity are included in Appendix 19.

Once all of the actionable ideas were presented and hung on the wall, each team member was provided with 2 sticky-dots and asked to vote for the 2 ideas they felt were most important or powerful; ideas that would accelerate our journey toward a more ideal future. As team members voted, certain opportunity areas began to emerge.

During a break, a data analysis team comprised of seven SAT members tallied the votes and identified the most popular ideas. Eight ideas had strong support. We considered these eight ideas as ‘opportunity areas’ for Schlegel Villages’ growth, and each was given a temporary title:



- Flexible dining
- Flexible living
- Meaningful activities
- Cross-functional teams
- Diversity
- Research and innovation
- Resident empowerment
- Authentic relationships

We announced the opportunity areas and gave team members instructions for the next collaborative activity, designing aspiration statements, which we will explore in the next Step.



Now it is your turn. Adapt and use the facilitator guide in Appendix 19 to plan and deliver the morning of Day 2 of your AI summit.



A colorful illustration of a town scene. In the foreground, a large green hill curves across the bottom. To the left, several green pine trees of varying heights stand on the hill. To the right, a row of buildings in red, purple, and orange is visible. A winding path leads from the foreground towards the buildings, with two silhouetted figures walking along it. The sky is filled with horizontal blue brushstrokes.

Step 7: Design Aspiration Statements

To wrap up the Appreciative Inquiry summit, collaboratively design aspiration statements and begin developing operational plans

- Action 7.1:** 'Vote with your feet' to join an aspiration statement design team
- Action 7.2:** Collaboratively design aspiration statements for the identified opportunity areas
- Action 7.3:** Get feedback, revise and present final aspiration statements
- Action 7.4:** Collaboratively select aspirations and develop operational goals and action steps

Resource materials for Step 7 are included in Appendices 20 – 21.



Step

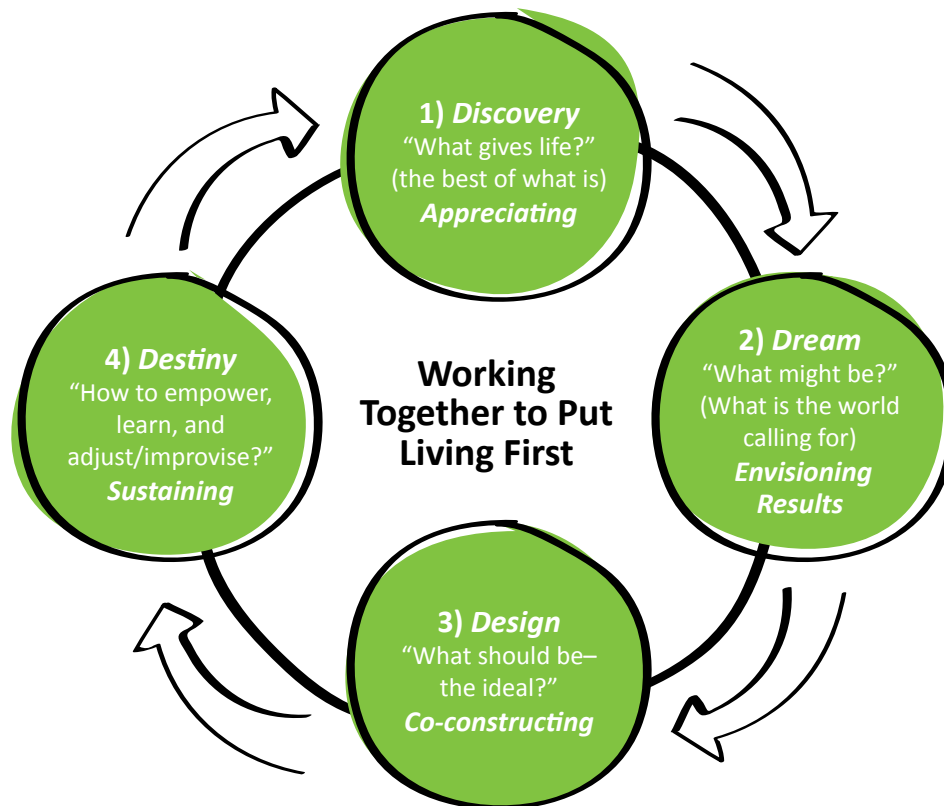
7

Design Aspiration Statements

Introduction

The AI summit aligned with the 4-D cycles of the AI process (Exhibit 7.0A). Step 7 describes the afternoon of Day 2 and all of Day 3 of the AI summit, focusing on the *Design* cycle in the AI 4-D process.

Exhibit 7.0A: The Appreciative Inquiry 4-D process



We describe how we collaboratively created 'aspiration statements' using the opportunity areas identified in Step 6, and then engaged participants in developing operational goals and actions to guide us in working toward 'what should be'.

According to Cooperrider, Whitney and Stavros (2008), aspiration statements are well-worded statements that "articulate the desired organizational qualities, processes, and systems to help guide the organization to its higher purpose" (p. 167). Stated as though it is something that already exists and is thriving within the organization today, 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). Please see the aspiration statement examples in Exhibit 7.0B, both of which were developed as a part of Schlegel Villages' AI process.

*Exhibit 7.0B: Aspiration statement examples***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.

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.



Appendix 20 includes a facilitator guide with instructions for the afternoon of Day 2 of the AI summit and matches the activities described in Actions 7.1 through 7.3. Appendix 21 includes a facilitator guide with instructions for Day 3 of the summit and matches the activities described in Action 7.4. These facilitator guides are based on our experience; feel free to revise it to suit the needs of your summit.



Action 7.1: 'Vote with your feet' to join an aspiration statement design team

On the afternoon of Day 2 of Schlegel Villages' AI summit, we announced the eight opportunity areas that emerged after the morning session (described in Step 6). These opportunity areas were:

1. Flexible dining
2. Flexible living
3. Meaningful activities
4. Cross-functional teams
5. Diversity
6. Research and innovation
7. Resident empowerment
8. Authentic relationships

Next, it was time to develop aspiration statements based on these eight opportunity areas. After listening to the instructions regarding how to design an aspiration



statement (instructions are provided in Appendix 20), team members were asked to walk to the breakout room assigned to the opportunity area of greatest personal interest to them. In this sense, they were ‘voting with their feet’ to form aspiration statement design teams for each opportunity area.

Our hope was to naturally achieve a good balance of diverse representation on each aspiration statement design team. However, in an effort to give everyone an opportunity to contribute and have their ideas heard and incorporated, each design team was limited to 20-25 team members.

All but 2 of the aspiration statement design teams had a large and diverse mix of team members. The most attended design teams were ‘meaningful activities’ and ‘cross-functional teams’, followed by ‘flexible dining’ and ‘authentic relationships’, and then ‘flexible living’ and ‘resident empowerment’. The design teams on ‘diversity’ and ‘research and innovation’ were smaller and more homogenous.

We learned an important lesson as our journey progressed; the design teams with fewer, less diverse members experienced slower uptake across the organization compared to other aspirations with large, diverse teams. If an opportunity area attracts a small and homogenous design team, it is important to question whether or not that particular opportunity area really has the support it needs to become a shared, organizational aspiration. At Schlegel Villages, we worked with the limited support ‘diversity’ and ‘research and innovation’ initially attracted, and they have received increasing support over time. However, if during your AI process, an opportunity area attracts a small group of supporters, you may want to have a discussion before advancing it to the level of an aspiration.

At this point in the day, we had design teams ready and eager to craft aspiration statements.



Action 7.2: Collaboratively design aspiration statements for the identified opportunity areas

Once everyone was assembled into aspiration statement design teams, based on their personal interests, they worked on the collaborative development of an aspiration statement (instructions for this process are provided in Appendix 20).

Each design team was asked to visualize the village they really want to see and experience from the perspective of their chosen opportunity area. For example, those on the ‘flexible dining’ team might imagine a cozy kitchen where they dine with a small group of friends in a seat they have chosen at the table they prefer. The group discussed together what their vision looks like, why it is so exciting to them, and what would make it possible (i.e., what would enable the change).

After discussion, the team then crafted an aspiration statement (e.g., in 5 years, what we most aspire to in terms of flexible dining is...). They were told these statements should be positive, use vivid language, and be bold and provocative. The statement should attract people, drawing them in to this ideal vision of ‘what can be’.

The aspiration statement design teams only had 45 minutes to prepare a first draft. The short allotment of time was deliberate to keep the teams energized and focused. As the teams worked, the breakout rooms were alive with ideas, critical reflections and creativity. When the 45 minutes was up, a facilitator called everyone back to the main room as final sentences were frantically drafted. Two facilitators then took the stage and guided the teams through a presentation and feedback process. This is described in the next action.



Action 7.3: Get feedback, revise, and present the final aspiration statements

Once the design teams were back in the main room, with a draft aspiration statement in hand, facilitators took the stage and guided the teams through a presentation and feedback process (instructions for this activity are provided in Appendix 20). Gaining feedback is essential to this process as aspiration statements should provide clear, shared visions for the organization's destiny.

A member of each team read their draft aspiration statement aloud to the group, and everyone was asked to signify their level of acceptance with what was stated by holding up the appropriate coloured feedback card:

- 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

Anyone who held up a red or yellow card was asked to briefly provide their specific feedback, in writing, on the back of the coloured card so it could be given back to the design team. Participants were asked to think about the following questions when drafting their aspirations and providing their feedback:

- a. **Provocative:** Does it stretch, challenge, or interrupt the status quo?
- b. **Grounded:** Are examples available that illustrate the ideal as a real possibility? Is it grounded in the organization's collective history?
- c. **Desired:** Do you want it as a preferred future?
- d. **Affirmative:** Is it stated in bold and positive terms?
- e. **Participative:** Does it engage and include people in decision-making about the destiny of their own lives? (Cooperrider et al., 2008)

This feedback process was a blast – talk about high engagement – and the team members seemed very discerning. Yellow cards were raised frequently, but very few people felt any of the draft statements deserved a red card.

After collecting the feedback, the design teams were ready to revise their aspiration statements accordingly. However, we found taking a break before teams went to work on their final revisions was a good strategy to keep people energized. You may want to consider interrupting the afternoon with a fun activity to inject some energy back into the day. We did a photo-scavenger hunt based on the theme of 'resident-centredness'!

Following the activity break, the aspiration design teams returned to their breakout rooms for 30 minutes to review and consider all of the feedback they received. Again, this activity moved at a quick pace in an effort to keep the energy high and the work focused. After making final revisions, teams returned to the main room to share their final aspiration statements. This activity (described in detail in Appendix 20) was really meant as a celebration.

Entire teams came up to the main stage together to share their collaborative work. You could hear the major difference a single cycle of feedback and revision made. All of the statements had improved drastically. After each team read their aspiration statement, the room erupted in applause. One could sense these were ideas everyone could get behind. It truly was a celebration. The final aspiration statements that were collaboratively developed by 180 team members from Schlegel Villages are listed in Exhibit 7.3.

Exhibit 7.3: Aspiration statements generated at Schlegel Villages' Appreciative Inquiry summit

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.

*Exhibit 7.3: Aspiration statements generated at Schlegel Villages' Appreciative Inquiry summit**...Continued****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.



Now it is your turn. Adapt and use the facilitator guide in Appendix 20 to plan and deliver the afternoon of Day 2 of your AI summit.



Action 7.4: Collaboratively select aspirations and develop operational goals and action steps

The final day of Schlegel Villages' AI summit helped village teams wrap up *Design* by engaging participants in planning how to enact and sustain the aspirations as we move toward our *Destiny*, the fourth cycle of the AI 4-D process (instructions for the activities described in this action are included in Appendix 21). Village teams were encouraged to think about some possible goals and actions that could help them achieve their newly realized aspirations. They were also asked to consider how to include village members in the actual process of developing goals and actions.

In previous years, Schlegel Villages' operational planning retreat was just that: a focused time for village teams to begin the process of identifying goals and working on their operational plans for the coming year. These operational plans were then finalized at the village and submitted for review and approval. But this year, there was a new spin. Instead of working toward our aspirations in parallel with our operational plans, the villages were asked to use our new aspirations as the basis for their operational plans.

The idea was not for the village teams to complete their operational plans for the coming year at the AI summit, but rather to begin having conversations about what aspirations they would like to focus on in the coming year and how to work towards them.

Each village team was asked to select 2-3 aspirations as a starting point, since it would take significant efforts to achieve any single aspiration. They were all sizable goals. To narrow their focus, we suggested they share the aspiration statement with village members upon their return and find out which were most appealing to them. Finally, we asked the team to consider the following questions in relation to any selected aspiration:

- 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.)?

After some lively discussion, the village teams selected 2-3 aspirations that they were interested in exploring further. They then worked together to determine what goals would enable them to accomplish their selected aspirations as well as the necessary strategies to achieve these goals.

Next, the teams were asked to develop an action plan to support them in reaching their goals. This involved identifying people who would be accountable for each action step, time frames, and descriptions of how short-term and long-term milestones could realistically be achieved. Teams also had to consider the outcomes they expected to see as a result of their plans. At Schlegel Villages, we reasoned the outcomes associated with aspiration statements impact 1 of 3 areas: people, quality, and/or sustainability. Teams were asked to consider the following questions in order to assist them in articulating their desired outcomes:

- **People:** What results will occur for residents, family members, team members, or others at our village?
- **Quality:** What results will occur that enhance the products, procedures or services we provide within our village?

- **Sustainability:** What results will occur that ensure the long-term financial viability of our village? This will ensure these improvements become a permanent part of our future.

After an hour of working in village teams drafting goals, strategies, action plans, and anticipating results, participants moved into what we called a Village Pair-Share activity in which we paired village teams together, based on village size and geographic proximity to one another, to share and gain feedback on some of their initial thoughts regarding operational goals and strategies. The goal of the activity was for each village to draw on their partner-village's feedback and

ASPIRATIONS

When it was their turn at the front of the room, the Village of Glendale Crossing's GM, Michelle Vermeeren, had an important message to share:

"We couldn't develop any goals because we have not yet asked our residents or the rest of our team which aspirations we should work on first. We're going to select our aspirations as a village, and then collaboratively develop an operational plan."

The room erupted in applause. It was a light-bulb moment, after which the conversation in the room switched from presenting goals to discussing strategies for widespread, collaborative engagement of all village members in the operational planning process; something that had never occurred before at Schlegel Villages.

Learning from this experience, if we were to do it all over again, we would have held Day 3 of the AI summit back in each village, and not as part of the organization-wide retreat. This would allow each village to engage a greater number of their community members in selecting aspirations and developing operational plans. In Appendix 21, we describe the activities we engaged in at our summit, but these activities can be tailored to the community setting. We've also included discussion questions at the end of this action to help you strategize ways to engage your community more fully in this planning process. But for us, this was an insight gained through experience.

ideas and fully develop 1 goal related to the promotion of 1 aspiration. After an hour of sharing, everyone returned to the main room to present what they came up with.

It was an exciting hour. As the villages presented their goals, we could hear Schlegel Villages' positive core alive in their strategies. Listening to each village's practical and tangible strategies, our aspirations, while significantly large, seemed just steps away.

Schlegel Villages' team members then returned to their home villages to engage as many village members as possible in the selection and development of 3 aspirations to serve as their operational goals for 2011. Some villages engaged all community members in a vote to determine the top aspiration statements, and then the leadership team worked to create goals and actions. Better still, after collaboratively choosing aspirations, some villages engaged any and all interested community members in creating their goals and actions.

The Village of Aspen Lake provided the strongest example of how to meaningfully engage a large group of village members in operational planning (during the 2012 planning process), including residents and family members. Team members from The Village of Aspen Lake, Sally Cartier (Housekeeper) and Jenny Brown (Director of Recreation), reflected on the experience and power of their collaborative process during an interview with Jennifer Carson (please see Exhibit 7.4A).

*Exhibit 7.4A: The Village of Aspen Lake's collaborative operational planning process***Interview with Schlegel Villages team member Sally Cartier, Housekeeper, March 31, 2014**

Jennifer: Can you tell me more about the retreat where your village decided to write its operational planning goals for the year?

Sally: What we did was we had all the aspirations listed on, what do you call that, the white board, the flip chart board paper, and we had cards in front of us. So green was 'we feel strong about it', yellow was 'it was up in the air', and red was 'we didn't want to work on this one'. So we read out all the aspirations and those were four that had the most green votes, and flexible dining came in second, yeah.

Jennifer: And then did you all work as a group to plan your goals?

Sally: And then, when we had the four down, then we went to the flip chart, to the one that we felt the strongest about. We each walked to whichever one we wanted to and we came up with ideas for how we wanted to represent it or roll it out into a program at the village. And we actually, at our last advisory meeting, finalized what we're going to do for each of them.

Interview with Schlegel Villages team member Jenny Brown, Director of Recreation, March 31, 2014

Jennifer: I wonder if you could tell me a little bit more about your operational planning retreat at your village? I had the opportunity to go once and to experience it firsthand, and it was so amazing. So, could you tell me the story about what happened this year?

Jenny: This year another good experience we had I think probably about 30 or more of us there. There was a good handful of us. The entire Village Advisory Team was invited to attend, so that made sure we had people from pretty much every discipline and various positions within the village... We had residents, family members, all the Village Advisory Team, the entire leadership team, so that includes our Directors and the Neighborhood Coordinators, the kinesiology position, so a lot of leaders, and then in addition to that, every neighborhood chose two people... to send so we had a good mix, and our success award winners all came as well.

Jennifer: Wow, that's great! What a good group... It sounds like you really had the opportunity to reflect on these ideas collaboratively before writing them up as a plan. How is that different from other operational planning experiences you've had...?

Jenny: Well I think the benefit of doing it the way we're doing it is the whole village has a take and interest. I think in the past, we [the leadership team] have come up with all sorts of great ideas and then, at best, every quarter when we're required to do a report, we'd be like, 'Oh crap, we haven't done anything on this,' or something like that, so there was not really that continual

*Exhibit 7.4A: The Village of Aspen Lake's collaborative operational planning process
...Continued*

movement. For me, it was more like starts and stops. It was a great idea and you'd realize two weeks before that you better do something on it or you'd have nothing to report where now I find that we're continually moving it forward and I think that has something to do with the collaboration, but it also has something to do with how committed everyone is to seeing progress. So I think the collaboration absolutely helps. I think also the ideas are better because we work together. So I think sometimes, as leadership in the past, maybe we weren't quite as connected to the team members, and that there were great ideas but they weren't feasible or they don't think everything through. Having everybody as a part of that discussion, you'll have somebody speak up and say, "You know, I just don't see that happening time wise. We can't spare the time." And they're giving it to us honest because it's important that we understand we can't be setting ourselves up for failure; that's ridiculous. I do think working collaboratively has really been an important part of it for sure.

Exhibits 7.4B and 7.4C provide examples of the goals, strategies and anticipated results developed for the Flexible Dining and Resident Empowerment aspirations, respectively.

Exhibit 7.4B: Selected operational planning goals, strategies and anticipated results for 'flexible dining' from Schlegel Villages



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.

Goals

- Provide opportunities for residents to schedule dining around life, not life around dining
- Engage residents and team members in ideas regarding alternative dining services and how best to provide them
- Provide education and training on flexible dining to all village members
- Offer increased choices during meal times and what times meals are served
- Freedom to enjoy dining space without seating assigned by team members
- Offer an extended Sunday brunch
- Eliminate snack cart and redefine a snack process that is more engaging and effective
- Provide pantry items in the country kitchens for residents, family members and team members to access 24 hours a day
- Provide continental-style breakfast items in each neighbourhood daily for residents who would like to sleep in or choose to skip a full breakfast

Strategies
<ul style="list-style-type: none"> • Trial flexible dining in a specific neighbourhood and then roll out across the entire village • Observe other villages' (or organizations') dining programs and services • Utilize food committee and Residents' Council to solicit input and feedback • Provide nutritious and delicious breakfast items for not only the late risers but also the early risers and those who are on therapeutic diets • Take a team-based approach to dining service delivery in order to support flexible dining
Anticipated Results
<ul style="list-style-type: none"> • Decreased resident agitation and other behaviours and improved functioning as a result of waking naturally and enjoying a leisurely morning, set at the resident's pace • Enhanced reputation and increased waiting list as news of our approach to flexible dining spreads by word-of-mouth in the positive testimonials of residents and family members • Improved scores on our dining satisfaction survey • Increased number of food and beverage choices at the same cost • Increased revenue generated by increased number of guest meals served • Smoother transition when moving from retirement or private home into LTC • Enhanced life purpose and independence for residents by enabling their right to make choices • Increased resident and family member satisfaction by offering opportunities for choice • Enhanced sense of home within our village by having food and beverages freely accessible

Exhibit 7.4C: Selected operational planning goals, strategies, and anticipated results for 'promote resident empowerment' from Schlegel Villages



Promote Resident Empowerment
<p>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</p>
Goals
<ul style="list-style-type: none"> • Develop opportunities for residents to serve in leadership roles within their neighbourhoods, village and community • Team member work activities directed by resident goals, not predetermined job routines – each day will look different • Increase resident participation in human resource activities such as interviews • Work with and support residents in discovering life purpose at the village and beyond • Develop an admission lifestyle summary of resident history, background, accomplishments and interests prior to a resident move-in and share this information with team members • Improve the collection of information and use of the Resident Profile • Improve communication between residents, family members and team members

Strategies

- Hold neighbourhood *Learning Circles* to gather and discuss resident and family member ideas and feedback on all aspects of daily living on the neighbourhood and in the village
- Utilize the 'Paint a Picture' assessment tool from APO (Activity Professionals of Ontario) to capture information about residents and place findings in the flow sheet binders for all team members to access and add to as new discoveries emerge
- Involve residents in interviews for new team members
- Invite residents to speak at Day 1 General Orientation and at portions of neighbourhood meetings
- Educate and train all village members about resident rights and discuss and celebrate examples of resident empowerment at neighbourhood meetings
- Hold quarterly Town Hall meetings with agenda, posted in advance, set by a team comprised of resident, team member and family member representatives
- Introduce new voting system from AI summit (red-yellow-green card system with written or verbal feedback) to gather feedback on various aspects of village life (i.e. programs, care, services, food, etc.) and to aid in decision-making
- Develop resident discussion groups around the topic of 'life purpose' to help each resident identify individual goals and aspirations and then share information with team members
- Work on increasing residents' functional abilities for activities of daily living that are meaningful (i.e. making bed, cooking meals, cleaning, laundry, gardening, shopping, etc.)

Anticipated Results

- Increased resident statements of fulfillment, purpose, inclusion, and feeling of value
- Increased resident involvement in activities of daily living of interest (i.e. making bed, cooking meals, cleaning, laundry, gardening, shopping, etc.)
- Increased use of country kitchens by residents who wish to make their own meals/snacks
- Increased number of resident-driven/led programs and in the number of resident volunteers
- Improvement/greater maintenance of functional abilities through active engagement

It is important to note that not all of the villages used a collaborative process to select their aspirations and set their goals. Across the organization, only five villages used a collaborative process to guide their operational planning, while six continued to use a leadership-driven approach. But we understood: culture change takes time. Some villages were not yet ready for that level of engagement and collaboration, but would grow into it as our journey progressed.

Testimonial from a Schlegel Villages team member

"We are on the brink of an exciting adventure, and I am excited by all the possibilities to make life better in our villages. I am so pleased that we were able to capture the initial feedback from team members, residents, and family members, and then translate them into aspiration statements. Our team discussed posting the aspiration statements and having team members vote (by sticker) for their priority goals. I am looking forward to sharing our success, for whatever outcome occurs, as we will have listened and acted proactively."

(GM, September 30, 2010)

Discuss the questions below with your learning partners to ensure you engage as many community members as possible in selecting and operationalizing your aspirations after the summit.



Discussion Questions

- How will we engage widespread participation in the *Design* cycle of our AI culture change journey?
- How will we collaboratively select which aspirations to work on first?
- How will we engage as many community members as possible in developing operational goals and strategies to turn our aspirations into realities?

At the conclusion of the 3-day summit, we took some time for an anonymous evaluation. Here are some representative comments from participants:

“This process drew on everyone’s strengths, thoughts, opinions. One of the best group projects I’ve ever participated in. As a result, goals are meaningful and achievable, not overwhelming!” (Direct support team member)

“It was nice to end on a positive note, to walk away with what I believe is the beginning of a tangible operational plan.” (Manager)

“I love that we walked away not overwhelmed by challenges but inspired with hopefulness... because we had not only dreamed but DESIGNED how to achieve this dream.” (Department head)

“This was a fantastic process. The real power of the event was the cross-functional attendance and involvement of team members from all areas of the organization. This is what will allow a time-limited ‘event’ to engender deep rooted systems change over time.” (Support office team member)



Now it is your turn. Adapt and use the facilitator guide in Appendix 21 to plan and deliver Day 3 of your AI summit.



Step 8:

Work Together to Achieve the Organization's Destiny

Collaboratively reflect on actions and share success stories
at a Destiny retreat

Action 8.1: Showcase, celebrate and learn from early success stories

Action 8.2: Learn and grow through innovation *Learning Circles*

Action 8.3: Reflect on progress

Resource materials for Step 8 are provided in Appendix 22.



Step

8

Work Together to Achieve the Organization's Destiny

Introduction

Drawing on the AI literature, the *Destiny* cycle calls us to enact our designs by initiating cross-functional, cross-level, and possibly even cross-village projects to reach our shared aspirations and goals. It also calls us to recognize and celebrate what has been learned and transformed in the AI process to date.

Approximately 8 months following our AI summit, we scheduled an event that we called our Destiny retreat in order to:

1. celebrate and share early success stories and new learnings;
2. cross-pollinate ideas;
3. validate, revise and/or develop new action plans; and
4. engage in dialogue about our progress to date (i.e., repeat the collaborative organizational assessment that was used in 2009).

*Destiny
Retreat*

Although the thought of planning another retreat may seem daunting, it is important to come together to share, learn, celebrate, and recalibrate before you get too far into your journey. A Destiny retreat worked well for us to accomplish these goals, but of course, your journey may look different.



Appendix 22 includes a facilitator guide with instructions for the Destiny retreat, matching the activities described in Actions 8.1-8.3. This facilitator guide is based on our experience; feel free to revise it to suit the needs of your retreat.



Action 8.1: Showcase, celebrate, and learn from early success stories

In May 2011, 8 months after the AI summit and 5 months after developing our operational plans, 160 village members, including residents, family members, and team members, gathered for a full-day Destiny retreat as a component of Schlegel Villages' 2-day annual leadership retreat.

Prior to the retreat, each village created up to three posters that described success stories or new learnings they had experienced since the AI summit (please see photos and stories on the following pages for examples). These success stories were shared at the beginning of the day in an activity we called Sharing Our Success Stories and New Learnings (detailed instructions for this activity are provided in Appendix 22). One of the villages spoke to the 'resident empowerment' aspiration by sharing a story about engaging residents in *Learning Circles* to decide on village activities. Another village shared a story about fostering 'authentic relationships' through a series of community gatherings where team members, residents and their families 'broke bread' together. Every village had a story to tell about a positive change or new learning.

Success Story Posters



Village Success Stories

Aspiration: Flexible Living

A number of residents and their family members had expressed the need or want for us to offer some alternatives to our dining experiences in the village. While some of our residents wanted to have the option to sleep in and not be tied down to our regime dining schedule, others of them expressed the need for different types of food being offered, as well as to have the choice of whether they even wanted to go to the dining room at all.

All of these requests were taken to the team to come up with some options that would answer the needs of our residents, while also being a workable option for our various team members. We decided to make up a questionnaire for our residents to find out some of their likes, dislikes, sleeping patterns, bath preferences, etc. We also decided to have our team members on the residents' specific floor or location to interview the residents themselves so they could learn firsthand their wishes and personal choices regarding their dining experiences.

Through our interviews we were able to obtain valuable information which we married together with some of the ideas we came up with to create some dining alternatives for our residents to try. We offered a continental or buffet style breakfast so the residents had a larger variety of foods in which to choose from, we made a lot of our seating areas larger to accommodate 6 or more people for a variety of social interactions, and we started to provide nourishment carts at mid-morning to accommodate those late risers.

We learned various things as a team from this endeavor. First we learned that although residents loved the idea and the choices involved in a buffet style breakfast, they did not have the dexterity or the steadiness to maneuver themselves through the buffet, nor were we able to assist every resident to do so. We learned that although the residents liked to have the option of sleeping in they did not like the fact that if they did choose to sleep in they had no one available to socialize with at the tables while they were eating. There were also only a handful of residents on the main floor that wish to sleep in and even fewer on our second floor. We learned

that residents really did not like to eat alone in their rooms when being offered food from the nourishment cart, instead they preferred to have the same food options, but to be able to come out of their rooms and eat where they pleased. We now offer warm oatmeal, cereals, toast, fruit, and beverages in our café every morning, which allows the residents to socialize while they dine. Finally our team members learned to be more flexible in daily living schedules and less task oriented.

Presented by the Village of Taunton Mills at the Destiny retreat

Aspiration: Promote cross functional teams

The Village of Riverside Glen has been consistently working on our Aspirational statement to build cross functional teams. Since the operational planning retreat in 2010, we have had many success stories.

1. Interprofessional Collaboration (IPC) training for all staff in LTC and Retirement Home. IPC training occurred last year in LTC, and Retirement home staff were involved in 4 separate day long training sessions in November 2010. IPC training consisted of topics like how to build trust, understanding our roles and roles of others and how we all as a multidisciplinary team can help provide the best possible resident centered care.
2. Implementation of the neighbourhood coordinator role. Having hired all three neighbourhood coordinators prior to the LTC expansion set the tone for Cross functional teams. Each neighbourhood coordinator is responsible to support two neighbourhoods each. With the increased hands on support and knowledge transfer, the concept of cross functional teams has evolved and team members are beginning to work together more for the benefit of the resident.
3. LTC expansion. Every detail from the job fair advertisement, to the interview process and orientation has been driven to develop cross functional teams. Management and support staff at Riverside Glen have been talking about cross functional teams to every applicant at the job fair to introduce the concept to help find the best 'new Schlegel family members.' Conestoga College assisted us with specific IPC questions to ask during group and one on one interviews. The neighbourhood coordinators and management team were specifically driving home IPC by even having managers from different disciplines do job interviews for other disciplines. The orientation process was also driven to promote cross functional teams. Teams were specifically divided up by neighbourhoods whenever possible instead of disciplines. All team members received IPC training and really began to understand how all the puzzle pieces fit together. On the last day of orientation, a panel was put together of residents, families, and staff members to talk about their journey through the LTC process and how cross functional teams have helped enhance their lives. At the end of the orientation, the feedback from staff was exciting. As we have begun to fill up our new edition, the new staff members have been even helping the existing staff members to recognize resident centeredness and how to work together as a whole team.

Presented by the Village of Riverside Glen at the Destiny retreat

A representative from each village volunteered to stand near their posters and tell their story. The rest of the team members had the opportunity to travel from poster to poster to learn about and celebrate their colleagues' successes.

Village members were encouraged to 'divide and conquer' so that each team could hear as many stories as possible. They then had the opportunity to meet as a village to discuss the stories they heard, and to make a list of the top three ideas generated from this process. The village teams were asked to consider the following questions during their discussion:

- Which ideas inspire you?
- How does each success story link with your village's aspirations?
- What new ideas do you have that build on the successes and new learnings of others?
- How will you communicate these ideas at your village?

Overall, this activity was an exciting hour of dialogue and cross-pollination. It allowed for successes to be celebrated while sharing new ideas. We hope your storytelling experience is equally as impactful. Using the question below, discuss with your learning partners how best to share your organization's successes.



Discussion Question

How will we showcase, celebrate, and learn from our early success stories?



Action 8.2: Learn and grow through innovation *Learning Circles*

After the team members had a chance to celebrate their successes together, we engaged them in an activity that we called Learning and Growing through Innovation *Learning Circles* (detailed instructions for this activity are provided in Appendix 22).

One-to-two *Learning Circles* were formed for each aspiration, and team members were asked to select a *Learning Circle* based on the aspiration that was of most personal interest to them. Members of the SAT acted as facilitators and used the following three discussion questions to generate suggestions, ideas and/or action plans related to their assigned aspiration:

1. What is one approach, process or activity your village used to support the realization of this aspiration that worked well?
2. What is one approach, process or activity your village used to support the realization of this aspiration that did NOT work well? What did you learn as a result?
3. What is one suggestion, idea or resource that would support the realization of this aspiration within your village and/or across the organization?

Upon completion of the *Learning Circles*, each group reported on their most influential realizations or 'A-HA!' learnings. These learnings uncovered many different and fruitful ideas

that could potentially be adopted across the villages. Because each *Learning Circle* facilitator was a member of the SAT, there was also an opportunity to continue the dialogue about potential approaches to promoting the various aspirations organization-wide at subsequent SAT meetings.

Use the discussion question below to engage your learning partners in considering ways to share learnings with all of your community members.



Discussion Question

How will we continue to learn, grow, and find innovative ways to advance our aspirations?



Action 8.3: Reflect on progress

The final activity at the Destiny retreat was an opportunity to gauge our progress towards a more social model of living by repeating the collaborative organizational assessment originally completed at the 2009 awareness-raising event (described in Step 2 and Appendix 5). Just as we had done in 2009, we used a *World Café* format to complete the assessment, and had two rounds of discussion to collaboratively determine where we fell along the institutional-social continuum (instructions for this activity are included in Appendix 22).

After completing the exercise and tallying the results (shown in Exhibit 8.3), we learned that the way team members viewed our organizational culture had changed in a positive direction: toward a social model of living. Pairing these findings with the success stories and reflections already shared, we knew exciting gains had already been made since our AI summit. We were proud to see these changes so early in our culture change journey.

Exhibit 8.3: Schlegel Villages' collaborative organizational assessment: 2009 and 2011

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



<i>Institutional model of care</i>	<----->		<i>Social model of living</i>
	<i>September 2009</i>	<i>May 2011</i>	
Focus on care	Average: 4.2 Range: 1-7 Mode: 3	Average: 6.1 Range: 5-7 Mode: 6	Focus on living (and care)
Scheduled routines	Average: 2.6 Range: 1-8 Mode: 2	Average: 5.1 Range: 4-7 Mode: 5 & 6	Flexible routines
Team members rotate	Average: 5.4 Range: 3-8 Mode: 5	Average: 7.5 Range: 5.5-9 Mode: 8	Team members assist same residents

Continued on next page

<i>Institutional model of care</i>	<----->		<i>Social model of living</i>
	<i>September 2009</i>	<i>May 2011</i>	
Decisions <i>for</i> residents	Average: 4.8 Range: 1-8 Mode: 4 & 6	Average: 6.3 Range: 4-9 Mode: 5	Decisions with residents
Environment = workplace	Average: 5.6 Range: 1-9 Mode: 7	Average: 7.6 Range: 6-9 Mode: 8	Flexible routines
Structured activities	Average: 3 Range: 1-7 Mode: 1	Average: 6.1 Range: 3-9 Mode: 7	Planned + flexible + spontaneous
Hierarchical departments	Average: 4.8 Range: 2-9 Mode: 3, 4 & 5	Average: 6.7 Range: 5-8 Mode: 7	Collaborative teams
Team members care for residents	Average: 6.2 Range: 3-10 Mode: 5 & 7	Average: 7.2 Range: 4-10 Mode: 8	Mutual relationships
Us and them	Average: 6.0 Range: 3-9 Mode: 6	Average: 7.9 Range: 7-9 Mode: 8	Community
OVERALL AVERAGE	Overall Average: 4.7	Overall Average: 6.7	

Although the positive findings uncovered at the retreat were encouraging, the real purpose of this activity was to engage team members in reflection and discussion about our journey to date. By celebrating and sharing our successes, we learned valuable lessons about what was working and where we could strengthen our efforts.

It is important that you have a plan in place to systematically reflect on and measure your progress. You may want to discuss how you will do this with your learning partners.



Discussion Question

How will we reflect on and measure our progress?

Testimonial from a Schlegel Villages team member

... about culture change as a mindset shift

I think that real success isn't about words on a piece of paper or some program today or tomorrow, but hopefully about engaging a lot of hearts and minds in thinking about things differently, because it's continuous, and that mindset change will be the ultimate victory.

(Matt Drown, Vice President of Human Resources, March 12, 2014)

Interview with a Schlegel Villages team member

... about the financial side of culture change

Jennifer: I have to ask how can you tell that the leadership at Schlegel Villages is committed? What do they do that gives you the sense they're supporting this?

Jenny: My most obvious support would be from Paul Brown and at his level he comes to our village once a month and we do a business performance review with the Directors and Neighborhood Coordinators. And in other places that kind of meeting would focus on financial fitness essentially, right? It would only be about money. But the way we handle it, and Paul is very careful about doing this and he's always looking for ways to do it better, but the way we handle it here, with his guidance, is that the first thing he wants to hear about is how we are doing on our culture change. He wants to know about various initiatives and how they're helping, and 'tell me a success story.' He loves stories. And seeing how committed he is about asking about that all the time and trying to find out where we are and how are things going and what are the team members' experiences? And being excited about our residents' experiences. It just comes out of him, so I think that's how I know.

Jennifer: Wow, that's awesome. So I guess eventually you guys have to talk about the budget?

Jenny: We do. We do talk about budget. I mean it is part of life, right? We are a business. But it's kind of the last thing on the list which is nice because numbers are numbers but it's really the residents' experience that's important. I've heard him say before, if we're doing things right and we're making it a place that people want to live and all those pieces are falling into place and our team members are feeling engaged and supported then the financials will always follow. They will fall into place.

Jennifer: And do you find that that's true?

Jenny: I do, yeah, it plays out for us in regards to our team members, I mean we have such a low absenteeism and those types of things that are costly to an organization and I think that's all part of people feeling like they're needed and wanted and valued.

(Interview with Jenny Brown, Director of Recreation, March 31, 2014)



Now it is your turn. Adapt and use the facilitator guide in Appendix 22 to plan and hold your Destiny retreat.

A colorful illustration of a town scene. In the foreground, a large green hill is partially visible. Behind it, a row of green pine trees stands. To the right, a street curves through a town with several buildings: a red two-story building with a yellow awning, a white building with arched windows, and an orange building. Two silhouetted figures are walking on the street, one with a cane. The sky is filled with horizontal blue brushstrokes.

Step 9: Share Successes, Broaden Engagement and Keep the Momentum Going

Broaden engagement by creating community advisory teams,
and look for ways to keep the momentum going

Action 9.1: Develop community (village) advisory teams
(if your organization has multiple communities)

Action 9.2: Look for ways to keep the momentum going

Resource materials for Step 9 are provided in Appendices 23 – 30.



Step

9

Share Successes, Broaden Engagement and Keep the Momentum Going

Introduction

At Schlegel Villages, we kept the momentum alive after our Destiny retreat; collaboratively planning and taking action, then observing what happens and reflecting on our progress. These continuous observations and reflections served as checkpoints, allowing us to assess progress toward our milestones and inform future planning and actions.

In order to do this effectively, given our large number of team members, residents and family members spread across villages, we explored a number of strategies to broaden our engagement and keep the momentum going. One of the most successful strategies was the development of Village Advisory Teams (VATs), and this process will be explored, along with other strategies, in this Step.



Action 9.1: Develop community (village) advisory teams (if your organization has multiple communities)

In order to support continued engagement and focus on promoting our aspirations at the village-level, the SAT recommended that we explore the development of VATs in order to more directly include and involve more village members in our culture change journey. Village members knew that things were changing, but not everyone was able to articulate why the change was happening (i.e., as a result of our culture change journey and continued focus on the aspirations). The SAT proposed that VATs would help to increase awareness of culture change activities and promote the chosen aspiration statements by serving as vehicles to engage all village members in the culture change journey in meaningful ways. The VATs' primary purpose is to collaboratively promote and advance each village's selected aspirations through continuous and collaborative planning, acting, observing, and reflecting. Just like the SAT, each VAT would open a space for communication and shared decision-making among all village members, engaging as many people as possible in the culture change process.

Although the recommendation to create VATs came from the SAT, we still needed to engage as many village members as possible in the decision about whether or not to form VATs across the organization. In order to gain input from a larger number of village members, the SAT introduced the idea at the 2011 operational planning retreat. Following a presentation about collaborative leadership, another presentation about authentic partnerships (Dupuis et al., 2012), and a series of testimonials from members of the SAT about the benefits of 'working together to put living first', the village teams voted to decide whether forming VATs was something that the organization wanted to support. Interestingly, 3 villages had already self-initiated a VAT, modeled after the successful collaborations and contributions of the SAT! The remaining villages unanimously agreed that all villages would benefit from the addition of a VAT in the coming year (2012), and that the VAT should be made up of residents, family members and team members from all levels, departments, neighbourhoods and shifts.



Following this decision, the village teams went into breakout rooms to respond to a series of questions intended to help inform and shape the design of expectations and guidelines for the new VATs.

These formative questions included the following:

1. Do we agree that our village would benefit from the addition of a VAT comprised of residents, family members, and team members from all levels, departments, neighbourhoods, and shifts? Please explain...
2. What is the ideal number of advisory team members, and why?
3. What personal qualities and strengths would the ideal advisory team member possess?
4. Who should be on our VAT?
5. How do we envision recruiting VAT members (e.g., solicit volunteers, appoint members, nominations and voting, other...)? What are the pros and cons of each strategy?
6. How might we engage village members who are not selected or nominated to serve on the VAT?
7. Who could serve as chair or co-chair of the VAT, and why?
8. What other village workgroups, committees and councils meet regularly at our village (e.g., residents' council, family council, food committee, etc.)? Please list.
9. How might the VAT interact with, replace, or collaborate with these existing workgroups, committees or councils?
10. What is the ideal frequency of VAT meetings and why?
11. What commitments would we require of VAT members (i.e., attendance requirements, communication expectations, length of service, etc.)?
12. How would we ensure that village members are aware of the VAT's work?



Based on feedback from the village breakout exercise, as well as feedback from the SAT, a set of organizational expectations and guidelines (terms of reference) were developed to assist villages in forming (or continuing) effective VATs (sample terms of reference are provided in Appendix 23). It is important to note that while organizational guidelines were collaboratively created, VATs were free to adopt routines and practices that worked best in their village. The terms of reference were merely a resource. The SAT also developed a sample recruitment letter (Appendix 24) and agendas (Appendix 25, 26, and 27) for the first three VAT meetings, if they so desired to use them.



Action 9.2: Look for ways to keep the momentum going

As we mentioned previously, culture change is a continuous journey. Observing and reflecting on your operational plan as it unfolds provides essential information to keep your journey on course. The path you and your community take may change as a result of your reflections, but you must be sure you are still heading toward the ideal future you dreamed about.

Schlegel Villages has engaged in a variety of strategies to reflect on and critique our progress, but these activities were also essential in keeping the momentum going, as we moved toward a more social model of living. In this action, we will describe the following engagement activities:

- Roadshows
- Conversations cafés
- Reflection interviews

Roadshow

Based on the success of the ‘success story’ poster session at our Destiny retreat, the Changing the Culture of Aging Roadshow, developed by the SAT, was designed to:

- further educate all village members, but especially residents, about our appreciative quest to change the culture of aging and promote a social model of living;
- broaden village member inclusion and engagement in planning and decision-making about village life;
- recognize and celebrate what has been learned and transformed, thus far, on our culture change journey; and
- enhance our capacity for ongoing positive change.



During the roadshow, each village displayed the 19 success story posters that were shared at our Destiny retreat on their ‘Main Street’ (this is the hub of activity in each village and resembles a main street you would find in any small town, with shops and gathering places, etc.) for one week. Several fun and educational activities were also planned including a kick-off event, in which representatives from the SAT gave a presentation about culture change and our AI process. Then 3-5 ‘visiting storytellers’ from other villages shared their success stories.

The roadshow also included *Aspiration Learning Circles* as a way to collaboratively advance the host village’s selected aspirations. Each village was encouraged to hold three *Aspiration Learning Circles* over the course of the roadshow, in an effort to engage team members from all three shifts, in addition to residents and family members. Upon completing one *Learning Circle* for each of the three village aspirations, facilitators (chosen by the host village) completed a form reporting on their discussion (instructions for this activity are included in Appendix 28). This form was shared and discussed with the village’s leadership team. At this time, we did not have VATs up and running in every village yet, but this would be another great opportunity to engage this group.

The final activity of the roadshow was called the Passport Tour of Success. This activity encouraged village members to review as many success stories as possible during the week of the roadshow and to provide feedback about the posters on a ‘passport’ form. They were also asked to identify whether they would like to contribute to the advancement of the village’s aspirations, and how they would envision doing so. Once the village members completed their passport form, they were invited to submit it to the leadership team, along with their name, to enter a prize draw. The winner was announced at the end of the roadshow. The leadership team then had a wide range of ideas to consider. Again, had our VATs been formed at the time of the roadshow, the passport feedback would have gone to this collaborative body for further consideration.

The roadshow was very successful in helping us broaden our circle of inclusion and engagement in culture change. It also confirmed the need for continued engagement, as not all village members, at that time, were participating in our journey. Conversation cafés were another way to increase engagement and gain valuable feedback, and are described in the next section.

Conversation cafés

Dynamic conversation cafés, also developed by the SAT, represented our second focused opportunity for all village members to learn about and engage in Schlegel Villages' culture change journey, following the roadshow. Conversation cafés, which have become an annual event within Schlegel Villages, are similar to the appreciative interviews held prior to the AI summit (Step 4, Action 4.4), designed as a comfortable, interactive space in which village members can 'drop-in' to discuss and share their important feedback and insights on topics that matter to village life, as well as learn about the culture change journey.



Specifically, village members were invited to discuss the aspiration statements, including their awareness of and progress toward the selected aspirations within their village. Each conversation café was hosted by members of the SAT since we didn't have VATs in place at that time. In subsequent years, they have been hosted by VAT members. Instructions for facilitating these conversations are included in Appendix 29.

In our first year, facilitators had a total of 1,213 conversations with residents (n = 349), family members (n = 176), and team members (n = 688). Each facilitator completed an individual response sheet during and/or after each conversation. Then, at the end of the day, the facilitators met as a team to complete a 'Facilitation Team Summary', recording the key themes and learnings from their conversations. These summaries were then shared in a debriefing meeting with the village's leadership team and SAT members, in much the same way as the summaries from the appreciative interviews were shared (Step 4, Action 4.5). All of the summaries from across the organization were then transcribed and analyzed at the organizational-level, and presented at the next operational planning retreat.

We found conversation cafés to be an effective strategy both to engage a large number of village members and inspire and inform continued action toward our aspirations.



Discussion Question

How will you and your learning partners broaden engagement in your culture change journey and keep the momentum going?

Reflection interviews

After three years of working toward our aspirations, it was time to pause and reflect on our journey to date, both in terms of our process and impacts. What was working well? What was not working? What progress had we made? How could we make further progress?

Part of our reflection and critique process, in collaboration with the SAT and VATs, involved one-on-one interviews with residents, family members, team members and other key community members. The purpose of these individual interviews, aligned with Holstein and Gubrium's (1995) 'active interview' methodology, was to gain a better understanding of Schlegel Villages' culture change journey from the perspectives of the participants, including individuals with direct and indirect involvement. We interviewed members of the SAT and VATs, individuals who had an active role in developing the operational plans and carrying out its actions, along with others who were less involved and perhaps even still skeptical about the process. All of the interviewees were identified by the SAT/VATs.

Jennifer developed a draft list of possible reflection questions based on the principles and enablers of authentic partnerships identified by Dupuis and colleagues (2012), and an outline of process- and impact-oriented questions provided by Kemmis and McTaggart (1988). She shared the draft questions with members of the SAT to gain feedback, and then made the suggested revisions. Examples of the questions we used are provided in Appendix 30.

In our case, Jennifer conducted all of the interviews because this was part of her doctoral work, but we would recommend engaging your SAT and VATs in leading this process in each of your communities. It is also important to note that instead of restricting the interviews to pre-determined questions or a static interview guide, this process should be flexible, allowing a genuine conversation to happen between the facilitator and the participant. As such, at Schlegel Villages, each participant was asked to select 6 reflection questions that they would like to respond to during their interview. Concepts, ideas and other experiences that emerged from the initial interview questions were then used by the facilitator, Jennifer, as probes for further discussion in the immediate or perhaps subsequent interviews. In this way, the interviews more fully explored the experiences of each person and the group.

Then Jennifer organized the results of our interviews by including relevant quotes/stories under the following headings (to continue with our tree metaphor introduced in Step 1):

- **Our roots:** key aspects of the organizational culture that make our culture change journey possible, effective and sustainable;
- **Our trunk:** the role, experience and effectiveness of the SAT/VAT, and ways it can be strengthened;
- **Our growth rings:** reflections on and future opportunities for authentic participation of all village members in the culture change process;
- **Spreading the seeds:** Advice we would give to another organization interested in embarking on a culture change journey; and



- **Our branches:** successes, enablers, challenges, barriers, and future opportunities in the growth of the 8 aspirations:
 - Promote cross-functional teams;
 - Create opportunities for meaningful and shared activities;
 - Connect research and innovation to village life;
 - Offer flexible living;
 - Foster authentic relationships;
 - Honour diversity in village life;
 - Promote resident empowerment; and
 - Offer flexible dining.

It is important to report these findings back to each community, which can be facilitated by your VATs, and also across the organization. We accomplished the latter by holding a 1-day Reflection retreat, which helped us to realize the impact our journey was having on village life and identify important actions that could help keep the momentum going. We will explore the impacts and ideas for the future we discovered at the retreat in the concluding chapter, but first, use the discussion question below to consider with your learning partners how best to broaden engagement and keep momentum going on your journey.



Discussion Question

How will you and your learning partners broaden engagement in your culture change journey and keep the momentum going?



Conclusion

Reflecting on the Process and Impacts of the
Culture Change Journey

It has been nearly five years since we began on this journey. First, we engaged our village members in raising awareness about the culture change movement, and collaboratively decided to embark on this journey. Then, we held a summit using the principles and 4-D process of AI, and together we discovered our strengths, dreamed of new possibilities, designed our ideal future, and began working towards our destiny. We engaged as many community members as we could in continuous planning, action, observing, and reflection, and inspired each other to keep the momentum going. Finally, we held a Reflection retreat to celebrate the new culture we had co-created, to pause to understand what we learned in the process, and to make plans based on our learnings for the road ahead.

Conclusion

The timeline below (Exhibit 10.1) offers a brief summary of how our journey evolved, and we are still going strong today! Through our shared vision, collective commitment, and collaborative efforts, we have continued moving further away from an institutional model of care and more toward a social model of living (please see Exhibit 10.2).

Exhibit 10.1: Timeline for Schlegel Villages culture change journey

2009

Schlegel Villages' culture change journey began at our awareness-raising event in September 2009 where we presented a comprehensive overview of the culture change movement and then 140 leadership and direct support team members engaged in a collaborative, dialogical assessment of our organization along certain continuums that distinguished differences between an institutional model of care and a social model of living. This exercise enabled us to identify our strengths as well as opportunities for improvement, and to build consensus for an organization-wide culture change initiative.

2010

After making the collaborative decision to embark on a culture change journey, we developed an advisory team comprised of residents, family members, team members from every level of the organization, and research partners. The SAT worked to transform our 2010 operational planning retreat into a 3-day AI summit, resulting in eight organizational aspiration statements. The SAT continues to meet quarterly to guide our culture change process.

2011

Following our AI summit, each village was asked to select 3-5 aspirations they want to achieve and to strategize how they would engage wide-spread participation and collaboration as we moved into the *Destiny* cycle of the AI process, turning our aspiration statements into specific operational goals and action plans. At the *Destiny* retreat in May 2011, we reassessed our organization culture. Significant progress was achieved in every culture change domain.

2012

The villages continued to base their annual operational goals and action plans on selected aspirations. In January 2012, recognizing the value and importance of collaboration between village members, each village developed a VAT comprised of residents, family members, and team members to help guide and strengthen their culture change efforts. Representatives from the VAT serve on the SAT.

2013

We moved operational goals and action plans from the village level to the neighbourhood level and expanded our focus to five of our key success factors, including: product quality,

customer experience, people development, profitability and sustainability, and changing the culture of aging (i.e., our aspirations). This change was tied to our development of a new quality improvement framework and tool that enables us to gather individual- and neighbourhood-level data linked to our key success factors. As a result, the villages aimed to strengthen and/or improve factors either related or in addition to their selected aspirations. In May 2013, we reassessed our organizational culture and found that further progress had been made (please see Exhibit 10.2).

2014

The villages continued to develop and work toward operational goals and action plans at the neighbourhood level. To further strengthen our neighbourhoods, we started holding quarterly Neighbourhood Team Development Days, bringing entire neighbourhood teams together (all shifts) for team-building and to learn more about the skills and practices of self-directed work teams. We also held a Reflection retreat to understand what we learned, what advice we would give to others, and to celebrate our successes.

Exhibit 10.2: Schlegel Villages' collaborative organizational assessment: 2009, 2011, 2013

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



<i>Institutional model of care</i>	<----->			<i>Social model of living</i>
	<i>September 2009</i>	<i>May 2011</i>	<i>May 2013</i>	
Focus on care	Average: 4.2 Range: 1-7 Mode: 3	Average: 6.1 Range: 5-7 Mode: 6	Average: 7.4 Range: 6.5-8 Mode: 8	Focus on living (and care)
Scheduled routines	Average: 2.6 Range: 1-8 Mode: 2	Average: 5.1 Range: 4-7 Mode: 5 & 6	Average: 6.2 Range: 5-8 Mode: 6	Flexible routines
Team members rotate	Average: 5.4 Range: 3-8 Mode: 5	Average: 7.5 Range: 5.5-9 Mode: 8	Average: 7.8 Range: 5-10 Mode: 8	Team members assist same residents
Decisions <i>for</i> residents	Average: 4.8 Range: 1-8 Mode: 4 & 6	Average: 6.3 Range: 4-9 Mode: 5	Average: 7.3 Range: 5-9 Mode: 7	Decisions <i>with</i> residents
Environment = workplace	Average: 5.6 Range: 1-9 Mode: 7	Average: 7.6 Range: 6-9 Mode: 8	Average: 7.7 Range: 5.5-9 Mode: 8	Environment = home
Structured activities	Average: 3 Range: 1-7 Mode: 1	Average: 6.1 Range: 3-9 Mode: 7	Average: 6.7 Range: 5-8 Mode: 7	Planned + flexible + spontaneous
Hierarchical departments	Average: 4.8 Range: 2-9 Mode: 3, 4 & 5	Average: 6.7 Range: 5-8 Mode: 7	Average: 7.4 Range: 6-9 Mode: 7	Collaborative teams

Continued on next page

Institutional model of care	←----->			Social model of living
	Awareness-raising event	Destiny retreat	Reflection retreat	
Team members care for residents	Average: 6.2 Range: 3-10 Mode: 5 & 7	Average: 7.2 Range: 4-10 Mode: 8	Average: 7.8 Range: 6-9 Mode: 8	Mutual relationships
Us and them	Average: 6.0 Range: 3-9 Mode: 6	Average: 7.9 Range: 7-9 Mode: 8	Average: 8.2 Range: 6.5-9 Mode: 8	Community
	Overall Average: 4.7	Overall Average: 6.7	Overall Average: 7.4	

Although our journey is not over yet, we want to end this guidebook by highlighting some of the learnings from our Reflection retreat and the impact our journey has had on life at Schlegel Villages.

Our Reflection retreat was an engaging, creative, fun, and collaborative opportunity for us to critically reflect on the process and impacts of our culture change journey to date. In total, 42 village members participated, including 20 former and current members of the SAT, 12 VAT members and 10 organizational leaders.

During the retreat we held a number of reflection activities. The first involved all participants responding to the following question on a large sticky note: “What three words would you use to describe our culture change journey?” Throughout the retreat, participants wrote their responses on sticky notes and stuck them to a wall. At the end of the day, all of the words were synthesized into a ‘Wordle’ (www.wordle.net) to illustrate the relative frequency of each culture change descriptor. The results of this day-long activity are presented in Exhibit 10.3.

Exhibit 10.3: Words used to describe Schlegel Villages’ culture change journey



The morning's activities, designed as *World Cafés* (first introduced at the awareness-raising event and used frequently throughout our journey), were intended to help us reflect on our culture change process. Information gathered from the conversation cafés and reflection interviews (described in Step 9) were synthesized and summarized before each discussion. Organization-level Quality of Life Survey data from 2011-2013 was also provided. Below is a list of the key topics regarding our process that were discussed and the synthesized findings from both rounds of conversations.

Appreciating and deepening our roots:

Participants were first asked, "Reflecting back to the Fall of 2009, what key aspects of our organizational culture at that time do you think made it possible for us to embark on a culture-change journey?" The table facilitator identified and summarized a number of 'roots' identified by participants:

- Servant/serving leadership values
- Vision and commitment of senior leaders
- A commitment to resident-centredness
- Strong and trusting relationships
- A commitment to collaboration on all levels inviting all village members to participate
- A beautiful physical environment
- The health and growth of the organization
- Schlegel family's passion for innovation and research
- A sense of dissatisfaction with the status quo

Participants were also asked to reflect on our current roots: "What key aspects of our organizational culture today, make it possible for us to continue and sustain our culture change journey?" Participants identified the following roots as currently supporting our culture change efforts:

- Strengths-based leadership
- A commitment to collaboration on all levels inviting all village members to participate
- Vision and commitment of senior leaders; team member empowerment
- Multiple educational opportunities designed specifically to support culture change
- The SAT and VATs
- Servant/serving leadership values
- Commitment to research and innovation
- Using data to engage in meaningful conversations
- Creation of neighborhood coordinator role
- Neighborhood team development
- A story-telling culture
- Resident input
- Commitment to mission, values, and aspirations



Strengthening our process (our trunk):

Participants were asked to consider two questions to inform their reflection discussion regarding the SAT: 1) “What is working well?” and 2) “What are some ideas for improvement?” Exhibit 10.4 and 10.5 summarize participant responses respectively.

Exhibit 10.4 – World Café responses regarding the SAT and what is working well

- Inclusion of all stakeholder groups; residents, family members and team members all on equal footing.
- Resident involvement is important to our success.
- Taking the time at meetings to socialize and get to know each other better is a part of our success.
- Ability not to have to follow the agenda at each meeting, but to take a more organic approach and, at times, honour tangents that can be important.
- Appreciative inquiry approach.
- It’s very welcoming to newcomers.
- Consistent and regular review and use of our guiding principles at each meeting.
- “Recommendations” come from the SAT rather than “directions” from the organization.
- The SAT’s recommendations have greater value because they come from a collaborative process involving all stakeholder groups.
- Cross-pollination of ideas from VATs to SAT to VATs.
- Having SAT members provide support to the VATs.
- Informative guest speakers.

Exhibit 10.5. World Café responses regarding the SAT and areas of improvement

- Start bringing guests to SAT meetings; a guest that would be able to help the SAT member ‘spread the word’ to other Village members; a guest could be someone who is having trouble understanding culture change or someone who is very passionate about it and wants to learn more.
- Use technology resources (e.g., social media) to share our culture change story, but do not ‘put all of our eggs in this basket’ because some Village members prefer non-computer-based resources such as a printed newsletter, while others prefer one-on-one discussions.
- In our story-telling, point out and celebrate the small things; the small successes that add up. Culture change isn’t always a big idea.
- Anyone who comes to SAT meetings should be carefully selected and able to contribute to the discussion at-hand.
- Use newsletters more strategically to promote and provide information about culture change.
- SAT members could sit down more often with small groups of residents, family members and team members to provide information and ask for feedback (like mini-conversation cafés).
- VAT members could join the SAT on a rotating basis.
- Use a team leadership model with roles that are distributed to support the co-chairs.

Next, participants were asked to consider the same two questions to inform their reflection discussion regarding the VAT: 1) “What is working well?” and 2) “What are some ideas for improvement?” Exhibit 10.6 and 10.7 summarize participant responses respectively.

Exhibit 10.6 – World Café responses regarding the VAT and what is working well

- Information sessions and Aspiration Education Days are a great way to share information, gain feedback, ask people to complete commitment statements, and engage additional Village members in culture change work.
- Photos of ‘Aspirations-in-Action’.
- Silicone aspiration wristbands.
- ‘Caught-in-the-Act’ board to recognize team members who are actively promoting the aspirations.
- Established a consistent date and time to hold VAT meetings each month.
- We’re constantly seeking out and identifying Village members who are aligned with culture change values and eager to help out.

Exhibit 10.7. World Café responses regarding the VAT and areas of improvement

- Some people don’t understand what culture change is, so we have to continue our education efforts.
- Sometimes, a lot of information can be overwhelming, so we need to simplify culture change and talk about ‘putting living first’.
- Have VAT members facilitate annual conversation cafés to enable ongoing conversation.
- Get more leadership team members involved on the VATs, or at least ensure their total support.
- Get more people involved on the VATs and increase participation of direct care staff.
- Have more conversations about culture change at huddles.
- Mingle before you meet; spend some time socializing and building relationships at VAT meetings.
- During orientation, advise new team members on the different teams they can join.
- Include a VAT update on the agenda of leadership team meetings.
- Have a guest speaker from another VAT join your VAT meeting to share what’s happening at their Village.
- Have all neighbourhood coordinators plus one person from each neighbourhood (either a resident, family member or team member) on the VAT.

Growing opportunities for authentic participation (our growth rings):

Participants engaged in a process of ‘mapping the growth rings’ of our culture change journey by answering the follow questions: “What are the significant events of our journey? When did they occur, and approximately how many community members were involved?”. After this mapping exercise, participants reflected on the following question: “Given our growth thus far, what do you see as some important next steps on our journey and what are some specific strategies we can use to achieve each one?” The results of this discussion are listed in Exhibit 10.8.

Exhibit 10.8. World Café responses regarding next steps and strategies in our culture change journey

- Increase communication with residents both formally and informally, and continue building authentic partnerships, by inviting residents to huddles/meetings and by sharing information and gaining feedback at Residents' Council meetings and through one-to-one 'coffee conversations'.
- Recruit family members to join the VAT by giving presentations at Family Council meetings.
- We're data rich, but information poor. We need to share data Village-wide through the use of posters, online, in newsletters, and on team member boards, and then keep the dialogue going. Knowledge is power only when it's shared.
- Increase culture change-related communications with team members and other stakeholders through a variety of ways, including: one-to-one conversations, Aspiration Days, huddles, and talking point cards over a cup of tea.
- It's important to maintain the AI process within the Villages. Reflect on our progress and celebrate our success! Keep it positive.
- Keep making and wearing culture change-oriented t-shirts.
- Re-introduce and re-commitment to the aspirations on each neighbourhood. Remember that 'changing the culture of aging' is one of Schlegel Villages' five key success factors.
- Be mindful of the language we use and focus on keeping it user-friendly so our message is not lost.
- We're expanding our growth rings outside of Schlegel Villages by sharing our story at conferences, giving tours, teaching our counterparts at other organizations about culture change, and through our sponsorship and involvement in the first Canadian culture change conference, hosted by the RIA.
- "If we do these things, then soon a tree becomes a forest." (resident quote)



A 'tipping point' is a point in time when a sufficient number of community members dramatically change their behaviour by widely adopting a previously rare practice to such an extent that it becomes part of the cultural fabric of the entire community.

After discussing next steps in the culture change journey, participants then responded to the second question, relating to whether we had reached a 'tipping point' in our culture change journey. The summary of responses relating to this question are outlined in Exhibit 10.9.

Exhibit 10.9. World Café responses regarding reaching the ‘tipping point’ of our culture change journey

Question: Applying this concept to our culture change journey, have we reached a tipping point yet?

- It depends on the Village. Some Villages have reached a tipping point, but as an organization, we are not yet there.

Sub-question: If yes, what would you describe as the most significant indicator? In other words, how do you know we’ve reached a tipping point? As evidenced by what?

- For those Villages who have reached the tipping point, the language has changed, and for other Villages, the language is changing. That is one indicator. Another indicator is when we no longer have to explain ‘culture change’. It is just who we are and what we do.

Sub-question: If no, what do you think would enable us to reach the tipping point?

- Good communication and persistence in spreading the word. Sometimes this works best one-to-one over a cup of coffee or tea. It doesn’t always have to be a big campaign.
- A number of programs are also helping us spread the word and engage Village members with culture change values, including Neighbourhood Team Development and LIVING in My Today.
- The shift from departments to self-direct neighbourhood teams will also enable us to reach the tipping point.



Advice we would give another organization:

For this reflection activity, participants were first asked to: “Please brainstorm a list of advice you would give to another organization wishing to embark on a culture change journey.” Each table was then asked to collaboratively identify the Top-5 pieces of advice they would give to another organization, summarized in Exhibit 10.10.

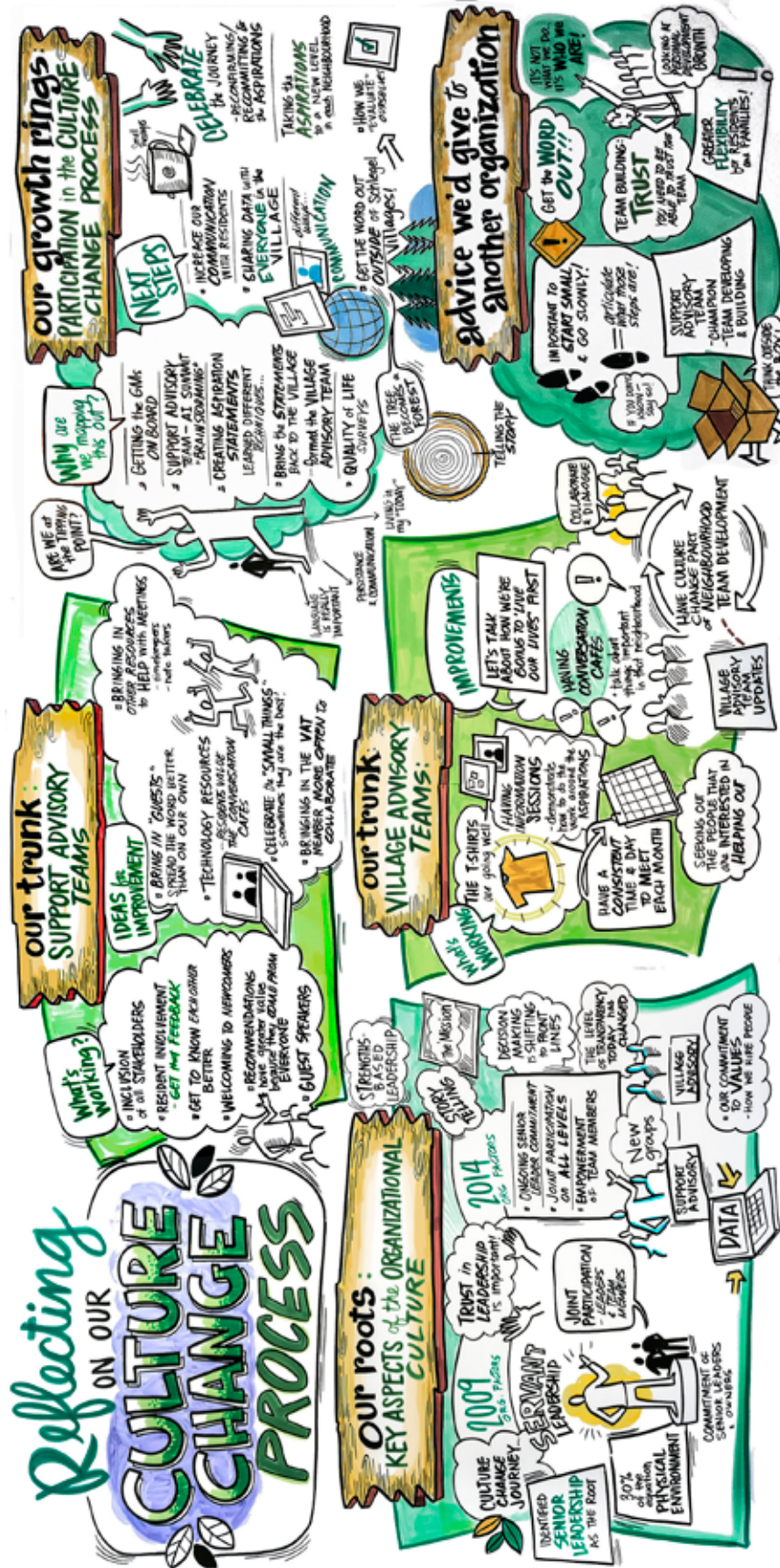
Exhibit 10.10: Advice for another organization embarking on a culture change journey

- Take small steps and move slowly. It is important to take small steps to make it feel natural and to ensure everyone knows what the steps are. Set yourself up for success. It is okay to be nervous at first. You will build and strengthen the journey as you go. It doesn't happen all at once. So be patient, and take your time.
- Admit you don't know what will happen. If you don't know, say so. You will figure it out together. But make sure you know what you are talking about. Articulate concepts so they are tangible, and not abstract. Clarify potential implications.
- Get the word out early and creatively (e.g., social media). Culture change is an authentic and organic process.
- Work on team-building, developing trust, and role clarity. Get everyone involved, but really work to encourage and engage the 'right' people. Consider attitudes and who wants to be part of the journey.
- You have to trust your team. People want to do a good job. People want to be engaged and care.
- It is best to lead by example. The VAT can support these processes and advise.
- Within a team, there also needs to be a champion to mobilize a participatory process that can be flexible.
- Support resident and family flexibility. Giving greater flexibility to residents and families is crucial to the entire process.
- Support out-of-the-box thinking.
- Empower teams to make decisions, be prepared to take risks and to know there will be mistakes along the way. Encourage courage; accept that risk is part of the process. Make mistakes and learn from those experiences.
- Be real and authentic, and make it your own. Culture change is not what we do, it is who we are. Organizations should reflect on this before starting: How do you know it is real? Do we sense it intuitively? Also, you can't compare your process with others' processes.
- Encourage personal development and growth. Understand that some people will start at different places and have different dreams and different experiences. Understand the importance of working alongside and coaching. Again, it is not what we do, it is who we are. This state of mind cannot be taught. It must be experienced.
- Know your organizational attitude (i.e., 'business' side). Organizations must embrace the 'out-of-the-box' factor.
- Be open to learning from yourself and others. Don't be defensive. Be humble enough to learn from others.
- Realize what are leading indicators (e.g., investment in people) and what are lagging indicators (e.g., finances). Truly focus on what works for residents and families.
- Understand the centrality of relationships and community development. We need to create a place where love matters, opening hearts and minds.



After completing two rounds of discussion about our culture change process, the facilitator for each topic/table offered a summary report of their findings. The larger group then had an opportunity to contribute additional reflections and comments. As each topic was presented, a graphic recorder, Liisa Sorsa (www.thinklinkgraphics.com) created a real-time image reflecting the highlights from the morning discussions (See Exhibit 10.11).

Exhibit 10.11: Graphic depiction of all World Café table discussions (reflecting on our culture change journey)



In the afternoon of our Reflection retreat, participants followed a similar process as they reflected on our culture change journey. These impacts were explored in terms of the organization's progress toward our eight aspiration statements. Specifically, participants formed groups around the aspiration of greatest interest to them and then critically reflected on our progress as an organization in achieving that particular aspiration. As each group presented to the larger group, and other participants added additional reflections and insights, the graphic recorder listened and recorded highlights on a single graphic representation encapsulating our progress toward all eight aspirations (See Exhibit 10.12).

Exhibit 10.12: Graphic depiction of all impact discussions (reflecting on progress toward 8 aspirations)



We hope you can see how valuable this journey has been for Schlegel Villages. Although our journey continues, we have made substantial progress toward all of our aspirations – toward our ideal future. None of these accomplishments would have been possible without following the Steps in this guidebook and our continuous effort to engage as many village members as possible in each step of our journey. While your journey will be unique, we hope you will find this guidebook a helpful resource as you guide your learning partners and your broader community in embarking on a collaborative, process-oriented journey that is guided by shared values and supported by your organization’s unique strengths.



Why AI Works: The Liberation of Power (Whitney & Trosten-Bloom, 2003)

- AI creates a context in which people are free to be known in relationship
- AI makes a space in which people are free to be heard
- AI opens the opportunity for people to be free to dream in community
- AI establishes an environment where people are free to choose to contribute
- AI provides the context for people to be free to act with support
- AI opens the way for people to be free to be positive



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There is growing recognition that deep changes are needed across the continuum of aging services, but more specifically in long-term care, as we progress from institutional, medical models of care to social models of living. This positive revolution is known as the 'culture change' movement.

In this guidebook, you will learn how one long-term care and retirement living organization partnered with a research team to embark on a unique culture change journey. As we share our story, we hope that you will find plenty of inspiration, insights and practical strategies that can be tailored to support your organization as you begin (or continue) your unique journey to create a better future within long-term care.

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