

Building Community Organizations (BCO)

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The Initiative: Cascading the Updated Vision of Haro Park Centre and Shaping its Shared Meanings

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Client Organization: Haro Park Centre

Haro Park Centre is an accredited, non-profit Campus of Care located in downtown Vancouver, BC. Haro Park Centre was the vision of the Netherlands Association for Senior Care (NASC) and Lions' Gate B'nai B'rith Building Society. Opened in 1980, Haro Park Centre (HPC) is located in the West End of Vancouver, half a block off Robson Street shopping and 5 minutes from the famous Stanley Park. Haro Park Centre provides a variety of housing and service options including Complex Care (Intermediate Care and Extended Care levels), Assisted Living and subsidized Independent Housing. (Brief website description - for full details on life at HPC, and the "Campus of Care" philosophy, Cf: <http://www.haropark.org/>)

Overview

This 5-month Organization Development volunteer engagement with Haro Park Centre is on cascading the revised vision of the organization. A progression of needs assessment meetings and 1:1 interviews with the members of the leadership council led the group and client to look into the revised vision as a focal point for improving organizational effectiveness. Four workshops across the different levels of the organization's hierarchy and departments were conducted. The shared meanings of the new vision were determined and the leadership council planned on cascading this to the rest of the organization.

I. Entry and Contracting:

The client came to BCO seeking help in dealing with a workplace where the atmosphere reflected negativity and conflict which were significantly affecting the work environment. From the outset, the client expressed that they are ready to move the organization forward where an enhanced quality of life would be evident not only for the elders but also for the staff.

As consultants we knew that scope would be a challenge with this project as there were a number of different initiatives which had been started in a previous OD intervention. This past effort resulted in an action plan where the beginnings of a *Healthy Workplace Program* and a *Communication Strategy* existed.

Our initial meeting with the leaders showed that they were open to let us in on what going on as they spoke of the challenges that appeared to discount efforts of creating a healthy workplace. As well, they spoke of being motivated by the passion and dedication of most members and the solid support present among members of the Leadership Council.

The leaders further disclosed that they were quite weary with their attempts at improving the work atmosphere and welcomed new ideas on how to move the organization forward.

II. Data Collection and Interpretation:

Initial Client meetings

After two meetings with the Executive Director and the Director of Finance, we decided that we needed to get more information from the other leaders in the Leadership Council in order to get to know the organization, build rapport with the leadership team, and learn what strengths existed there. As well, we wanted to gather more data about how the leaders interpreted the updated vision, and how communication and teamwork were operating presently.

Leadership Council interviews

Each consultant conducted 1:1 interviews with a total of 8 leaders participating.

The interviews looked into various organization practices like decision making, communication, performance management, recognition, feedback, and coaching. As well, the meaning of the new vision statement was explored. The results showed open communication and support among the Leadership Council members which confirmed that the trust level was high. The affirmation of staffs' passion and commitment to their work was also shared. The desire to continuously improve the working environment was also a strong aspiration.

On the other hand, there were also possible gaps for achieving the updated vision as expressed in the: lack of effective ways of communicating the vision, working with staff conflict, a few but strong personalities that appear to have an unfavorable influence on others, leaders and staff needing tools for self-care, work-life balance, and ways to rejuvenate, and that some current forms of rewards may not be supportive of the new vision.

We concluded that what would be very beneficial in creating a sustainable solution for the client was to work on leadership development in the context of focusing on what may already be working well for the teams and manage change beginning with the leaders as models. We suggested that working with staff issues as a start up would yield less sustainability and impact. Taking off with the leaders would send a strong message that there is a strong desire to move forward with the new vision of *"Leaders in enhancing the lives of elders and staff"*.

III. Action Planning

Through these levers, we saw that the new vision was going to be the anchor of any organizational changes that were to follow. A shared understanding of the vision will propel members to choose behaviors that shape it accordingly. We would therefore, facilitate the staff and leadership of Haro Park Centre in creating a shared understanding of what the new vision meant. Cascading the new vision is about experiencing what it looks like in terms of behavior for staff and leadership on a daily basis.

We planned to start with the leaders and then move on to holding a meeting for a cross-section of the staff, and finally to a leadership skills-transfer workshop where we would have both leadership and staff in the same venue.

IV. Implementation

IV.1 Leadership Council Workshop Haro Park (June 6, 2007)

Workshop Content:

- A. Introductions of BCO team - purpose of our work with Haro Park Centre
- B. What is the BCO/Building Community Organizations (BCO)?
- C. Feedback on Leadership meetings - highlights/themes
- D. Why create a vision? Questions about visioning at Haro Park Centre
- E. Creating Shared meaning of vision
 - Using Meta cards, participants made public phrases that came to mind about what Haro Park's vision meant to them. These short sentences and words were clustered into themes.
 - By means of storytelling, from appreciative inquiry process, attendees shared their best stories or experiences which illustrated the themes as these were associated with the vision.
- F. Aligning leader behaviours with vision (inclusion of "...enhancing lives of staff.")

- G. Small group discussions
- H. Next steps and evaluation

Highlights:

- Leaders developed an agreed upon understanding of the vision - there was a lot of alignment.
- Leaders worked very well together; were energized when talking about making the workplace healthier.
- Leaders came up with personal commitments/actions that they would commit to, to help to bring the vision alive daily in their behaviours; but were overwhelmed with this combined with having to keep up with their own workload.
- As consultants, we noted this and committed to helping them in some way before we completed the consulting engagement.

IV.2 Haro Park Staff Workshop: Sharing the Meaning of the New Vision (July 12, 2007)

Workshop Context (Decision of Where to Take the Next Steps):

After doing a workshop with the leadership Council where the process of clarifying the shared meanings of HPC's vision was done, turning over the ownership of the process to the leadership team seemed like the next logical step.

Determining the next steps was a consultative process, and it was expressed by HPC leaders in the meeting that they were feeling overwhelmed with the role of cascading the new vision to the staff. An agreement was then reached for the BCO Consulting team to run additional workshops to better prepare the leaders in taking on the project eventually. The following activities were decided:

1. Do an exclusive staff workshop to cascade vision
2. Do a staff workshop where some leaders would be in attendance to learn the process for cascading the vision
3. Do a leader workshop to integrate project and provide further guidance on moving the vision forward.

The HPC leaders in this meeting expressed excitement in carrying this forward and identifying how the vision was perceived by the membership of the organization, i.e., whether leaders and staff have a common or different understanding of the new vision. The logistics & time demands away from work were brought up and the HPC leaders expressed that this concern could be managed. The penthouse was also provided as a special venue for the workshops.

Participants:

The First Staff Workshop on Cascading the Meaning of the Vision was attended by 16 staff from the different departments and shifts chosen by the leaders.

It was a mixed group in terms of years of work at HPC ranging from 1 - 26 years. About 70 % of this total has worked in HPC for more 10 years. 2 members have been there for just a year.

Intervention:

The workshop basically used the same design as the one for the leadership council. The main activity for drawing out the shared meanings of the vision was through a Meta Cards exercise that generated the ideas and associations with the vision, as well as the stories that illustrated the themes.

Highlights:

- The introductions showed the staffs' excitement about the workplace having a generally family-like atmosphere. The variety of people one deals with at work was also a major motivator for staying.
- There was active participation from most of the staff throughout the workshop. During the main visioning exercise, however, some staffs mentioned that they could not relate to the vision with a positive story. The facilitators allowed the process to unfold with both the positive and the negative stories. The participants were encouraged to reframe the negative stories in terms of what could have been done to change the outcome to a positive one.
- The workshop wrapped up with ideas that would drive the organization towards the vision. Staff expressed the need to be acknowledged & supported in their suggestions by way of empathy and listening from management.
- There was an expression of no longer having a "we" & "them" between staff & management as seen in the way all members get involved with the organizational concerns, and in validating each other.
- Some staff committed to a more positive attitude by being more loving and patient to both residents and members of HPC. They also indicated that they could be more open and understanding of the assessment that is given to them on the job. Role accountability would also be improved with open communications to help minimize the stresses that happen on the floor.

IV.3 Staff & Leaders Session (July 26, 2007)

Workshop Context:

This third workshop continued with the process of cascading the vision and determining how other staff understood its meaning. The presence of the 3 leaders was aimed at the sustainability of the project. Transferring the skills in facilitating the cascading and clarifying meaning of vision to leaders was intended to prepare them for the role. Additionally, it served as an opportunity to start up a dialogue as first steps in developing more productive work relationships.

Participants:

This third workshop included 3 leaders who attended with the role of participant and potential facilitator for future workshops. There were 12 staffs in attendance.

Intervention:

This workshop also followed the basic design of using the themes and stories to draw out the meaning of the new vision. In addition, the results of this exercise were later shown alongside the previous two groups.

Highlights:

- The participants were intrigued to see the commonalities that ran through the themes from the 3 groups.
- Since transfer of the skills to the leaders in attendance was a consideration, leaders were given the role of scribing staff responses, facilitating small group discussions, and reporting back the themes obtained from the previous workshops.

- Staff and leaders discovered that they have the same desires for Haro Park. Despite a history of differences and some critical incidents, they agreed to focus on common ground and strengths of the organization.
- Staff and Leaders were respectful and open to dialogue. Group activities on shared meaning of Haro Park's vision lead to the discovery that both staff and leaders were clearly committed to the well being of residents and employees, i.e., moving Haro Park's vision forward.

IV.4 Leadership Council Workshop (August 8, 2007)

Workshop Context:

To integrate the BCO OD engagement with Haro Park Centre, the leaders were left with new paradigms and tools to move the organization forward with the new vision of "*Leaders in enhancing the lives of elders and staff*". It was the intention of the BCO consulting team to ensure the sustainability of what was started and to leave the client with much affirmation that there are many individual, group, and organizational strengths that they can continue to build upon. The resources are already within to implement and carry on the cascading process to rest of staff.

Intervention: (Workshop Content)

- A. Introductions, expectations, and group norms
- B. Summary of the 3 Workshops
- C. Force Field Analysis (Driving Forces & Restraining Forces) as applied to data from visioning exercise
- D. An Action Plan to Cascade Vision to Rest of Staff
- E. Bridges Transitions Model/Skills Development
- F. Self - Management
- G. Circle / Talking Stick Wrap Up
- H. Evaluation

Highlights:

- Individual and group exercises using the OD Model of Kurt Lewin's Force-Field Analysis allowed the leaders to look into the themes related to the vision from the perspective of being a driving force or restraining force. Identifying the driving forces reinforced the leaders' appreciation of the strengths of the organization. As well, the process emphasized that there was much common ground across all departments and between staff and leaders to work with.
- Leaders recognized the work which they must do to move Haro Park forward. The importance of an action plan to create and sustain a ripple effect for Haro Park Centre's shared vision was highlighted.
- Leaders recognized the necessity for self-management and support among leadership council to carry out this process.
- The workshop ended in a ritual where leaders formed a circle and passed around an eagle's feather while making a commitment to meeting the action plan and to overcoming the challenges that might get in the way of accomplishing them. The leaders also affirmed how they will continue to support each other, as well as, celebrated the unique contributions they can bring to realize the vision.
- Leaders expressed appreciation of the work accomplished by the BCO consultants. They felt energized and shared a common direction to lead Haro Park. As well, they were hopeful of a better relationship between management and staff.

V. Outcomes of the Project:

1. Created greater opportunity to open communication lines between staff and leaders
2. Client was affirmed about their organization's strengths and the need to focus on these more than what appears as not working.
 - By focusing our discussions and action planning we were able to identify where the shortfalls are, but more importantly to highlight that what we're already doing are contributing to the vision.
3. Client was energized talking about the shared meanings of the vision and in moving the HPC updated vision forward.
4. Client will carry on with the progress that has been achieved by getting back on track with the discussion on continuing the effort during this October's Leadership Council meeting.

VI. Lessons Learned

VI.1 Client's Perspective: (Based upon post program interview of client by BCO mentor)

1. Overall satisfaction: Satisfied because the consulting team clarified that we are on the right track regarding rolling out our vision. We got helpful guidance and tools. They brought good expertise, were well organized and very personable
2. Entry & Contracting: Done very well, were professional and clear.
3. Data Collection & Diagnosis: Done really well, asked lots of questions, sought clarification, attended our leader team meetings to seek this clarification and confirmation
4. Feedback & Decision to Act: Yes, Done well.
5. Implementation: Went well (see comments under learnings regarding other thoughts). They used good visualizations and examples, were assertive regarding their needs (e.g., flipcharts - would have appreciated more lead time on this as these are resources we do not have on hand)
6. Termination & Closure: We are left with greater ability to continue the rollout. Next steps piece done well, my debrief went well.

Learnings - opportunities to do better next time:

1. Provide appropriate lead-times for things such as session resources (e.g., flipcharts) and the need for other resources (e.g., someone to write-up the flipcharts)
2. Be careful of jargon (e.g., appreciative inquiry) - explain, use other words, make it seem safer to ask "what does that mean?", etc.
3. The session with staff seemed to spend too much time on dealing with the negatives in Haro Park (also talked about specific leaders)
4. The next session where one of the leaders had to read out the negative feedback from the staff session was not a good experience (for the person reading the report out and those having to hear it). I recommended this be done differently in the future
5. Would have appreciated better understanding on why we had to do things the way we did them (having staff pulled out of their work to attend sessions - expensive and disruptive to delivery of health care in Haro Park). I recommend that alternatives be offered, I would then feel better about the trade-off of costs/disruption vs. benefits with the option selected.

6. It was a real plus that the consulting team reflected in part the cultural diversity at Haro Park. I recommend this always be a consideration when putting together a team in the future.

VI.2 Consultants Viewpoint:

1. Allowing both the negative & positive stories to be shared openly worked for the staff present. They felt that they had been listened to, were thankful for the opportunity, and were looking forward to seeing the results from different workshops.
2. Organizational members have highly emotional reactions to events that may have a negative meaning. Since the data from a previous workshop was reported to the next workshop the following considerations could to be taken into account:
 - 2.1 While there were definitely no names identified with the negative accounts, it was perceived that “specific leaders were talked about”. Names were later associated with the incidents even if during the actual story telling no names were mentioned.
 - 2.2 The manner of reporting the feedback to the next workshop could be done with greater sensitivity and priming about what’s to be reported. A third party, i.e., external facilitator or the BCO team could have done the reporting. (Note: the skills transfer was the primary agenda when leaders were given the role of reporting.)
2. While we have used some OD jargon like appreciative inquiry we needed to explain the meaning of the term used as well as demonstrate and later explain how the AI process is done.
3. The additional role assigned to the leaders during the joint staff-leader workshop could have been primed more thoroughly. It appears that establishing the buy-in for this role needed to be done in a prior meeting instead of simply an email to communicate the purpose.
4. Clarifying options for the client and offering the pros and cons for a chosen intervention will help surface any potential reservations from both parties, as well as explore constraints that need to be overcome.
5. As a BCO Consulting team, it would also help to discuss facilitating styles and learning styles to check how members compliment each other. Leveling expectations amongst the team members also need to be given more attention.
6. Open communications among consulting team and the mentor was very helpful. The mentor encouraged and supported our decisions as well as provided another way of addressing the interventions in the different stages of our engagement.
7. Engagement affirmed the high level of enthusiasm in assisting an organization with its OD concerns. The project validated the consultants’ competencies and areas of strengths in this professional work, as well as allowed room to reflect on what may be developed further.