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Applied Embodiment Towards Optimization Within the Organizational Ecosystem: The Evolution of Best Practices Through the Design and Implementation of Learning Laboratory Experience Modules

Amy L. Angelo

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Submitted to the Program of the Organizational Dynamics in the Graduate Division of the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania
Advisor: Alan Barstow

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Abstract
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by

Amy L. Angelo

Submitted to the Program of the Organizational Dynamics in the Graduate Division of the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania

Philadelphia, Pennsylvania

2013
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EXPERIENCE MODULES

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ABSTRACT

This capstone describes a culture change project which demonstrates the value of a learning organization, a concept first proposed by Argyris and Schön then expanded by Senge and others. Learning Laboratory Experience Modules (LLEM) were developed, implemented and evaluated in response to the lack of understanding by staff about policies and the important roles of personnel across departments. Providing staff with a safe and interactive forum to understand their own role within the organization allowed them to connect with peers and to appreciate the sometimes challenging work of other disciplines. This created opportunities for synergy, the foundation of an effective model of care.
ACKNOWLEDGMENTS

To the extent that any of us might innocently wish to include an entire library of best contributions to our young and constantly growing discipline that is organizational dynamics, for me to engage in that degree of autodidactic indulgence would be sophomoric. Thus, I have drawn from the works and research that has most influenced and helped shape my career and understanding of the subtle and overt dynamics within organizations. I waited several years to pursue a Masters degree because I felt compelled to explore various facets of focus within the evolving context of my early career in Social Work. For the years leading up to my personal focus, the honing of my philosophical sphere took the form of directing my thinking as a generalist with the intention and commitment to develop myself professionally to in time become adept in that which governed my separate interests and guided my desire to affect change on a macro level.

This paper is a culmination of knowledge from years of engagement in, as well as observation of social systems, health care delivery models and holistic practices. My studies within the University of Pennsylvania Organizational Dynamics program have provided me with the framework and language to embody and apply my skills as a practitioner of change, a leader and manager within an innovative, interdisciplinary, government funded health care model. I am grateful to have had patient mentors in my journey and to have had the opportunity to share in the growth of the PACE/LIFE model of care. I would like to especially extend my sincere appreciation to my capstone
advisor Alan Barstow, Ph.D., my readers Nancie Zane, Ph.D. and Felice Tilin, Ph.D. Many thanks to the strategic guidance and inspiration from Abigail Coutu, and the all-encompassing support and love of my mother, Eileen Angelo: 1935-2012.
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CHAPTER 1
INTRODUCTION

An organization as two or more people working together is a source for increased productivity, as well as contradiction and friction. It is how the organization ultimately prepares for the inevitable differences in working styles, learning styles, beliefs and opinions of their employees that can either create an effective organization or one that struggles with the fluctuations of internal and external variables and naturally occurring forces. The healthy functioning of an organization is often at the mercy of its own collective awareness. The relationships among its employees and departments, as well as its ability to adapt and evolve as a whole in relation to its mission, vision, and values, can determine its sustainability. The role of the individual in the organization is important; individual members of a group and their dynamic of interaction speak crucially to the ripples of activity effecting macro level relevancies to geriatric health care or other complex, large scale public policy issues.

This has been a consistent area of study in my life and the reason I have chosen to explore in depth the dynamics of organizations, their substance and purposes. Having worked in the field of Geriatrics for nearly 20 years, I have developed a great interest in the evolution and aging processes of entities- individuals as well as the organizations that employ individuals, especially health care organizations. More particularly, I am interested in the states of existence and how this pertains to their health and sustainability. These interests have naturally led me to my current work which lies in analyzing the functioning of a nationwide geriatric health care program.
called Program of All-Inclusive Care for the Elderly (PACE). The particular PACE program in which the concentration of this paper is focused is called Living Independently for Elders (LIFE) and is owned and operated by a private, non-profit institution in Pennsylvania. It is here that the attempt to effect systemic organizational change to enhance the health care outcomes for its members and operational efficiency would take place. The LIFE program is an all-inclusive health care delivery provider to frail elders in an urban community.

Health care costs are escalating. Care for the elderly, especially nursing home care, is oftentimes the most expensive and least welcomed part of our current health care system. The non-profit health care model LIFE, which is an effective response to this situation, requires the full participation of an interdisciplinary team in order to provide the best care for each patient. This paper will explain the implications of staff gaining clear understanding of operational policies and procedures, along with a unified vision, connection to mission, and realized values on the effective and efficient operations within a preventative geriatric health care organization. Having worked at LIFE for 10 years, I had gone through different stages of engagement with and observation of the organization. At the start of my studies in Organizational Dynamics, I began with an organizational diagnosis of LIFE. The main discovery in this endeavor was the underlying cause of much of the angst among the employees and of the breakdown in process flow, service delivery and general efficient functioning of the organization. The cause was a fundamental lack of knowledge and understanding as a whole about why and how decisions were made regarding the delivery of services. It became apparent to me that if lack of knowledge and understanding was the cause of
team dissention, communication breakdown and disjointed work processes, then what had been the accepted way of educating and orienting staff to the mission and purpose for the duration of its existence had not been sufficient. Not only was the orientation process lacking, but the overall in-servicing of staff was not effective in calibrating the staff’s understanding to the changing nature of the policies and procedures relative to their function within the organization. In Chapter 2 I consider complexity science and related topics of theoretical relevance to developing a systems perspective towards the application within the complex adaptive system of the LIFE program, as well as what relevant work has already been done in regards to intentional design methodologies in learning organizations.

In Chapter 3, I share the outcomes of the preliminary diagnostic study which was completed to determine the needs as they related to decreased morale and an overall sense of staff disconnect to purpose, operational information and each other within the organization, and consequently the development of a Learning Laboratory Experience Module (LLEM) to work within the learning organizational context and affect change on multiple levels of personal and interpersonal dimensions simultaneously. The Implementation of the LLEM as an all day, retreat style in-service model will be presented in Chapter 4 with a review of the follow up evaluations, and next steps for the LIFE program. In Chapter 5 I offer conclusions and I discuss the implications of the possibility of future LLEMs in such interdisciplinary systems oriented organizations to better utilize organizational resources, both human and situational.
PACE / LIFE: A Model of Excellence in Senior Health Care Delivery

LIFE programs also known as PACE programs, as the model of care is referred to nationally, can take the place of nursing homes for medically qualified seniors over the age of 55. The member’s care can be fully covered by Medicare and Medicaid if they meet the financial qualifications. This is a comprehensive model where seniors access their health care needs in one location allowing them to age in place. Caregivers and family members are often an integral part of this program, and they receive assistance targeted to their specific needs to relieve some of their burden.

The model began in the Chinatown-North Beach community of San Francisco in the early 1970s where the values of the Asian immigrant families to keep their loved ones with them for the duration of their lives conflicted with the established system of nursing home facility institutionalization. Dr. William L. Ghee, a public health dentist, headed the committee that hired Marie-Louise Ansak in 1971 to investigate solutions. They, along with other community leaders formed a nonprofit corporation, On Lok Senior Health Services, to create a community based system of care. On Lok is Cantonese for “peaceful, happy abode” (Association, 2002). The program provides care to seniors in their homes, while offering center based health care services, adult day center activities, home care and meals.

The US Federal Government funded this program initially as a pilot project, and because of its great success of providing support and needed health care to the seniors of this community, it has continually received the financial support and regulatory backing by State and Federal policies and has expanded now nationwide. It has been
adopted as a best practice model for providing geriatric care to nursing home level of care certified seniors.

At the PACE model program where I have worked, I witnessed the various important ways this program benefits seniors. I also saw gaps in delivery of services and care to the seniors due in part to the non-cohesiveness among administration and staff, and disconnection from the mission and vision. It is from this viewpoint that my interest comes to realign this particular organization with its noble purpose through on-going educational sessions that I will refer to as the LLEMs.

When referring to the organization of LIFE, it is not possible to reduce it to just one of its several individual components. LIFE is both the insurer and provider of all services that it offers. LIFE is an actual physical location: a day center opened Monday through Friday where health care, physical rehabilitation, social services and activities, and nutritional care are provided to the members. LIFE delivers home based health services, including warranted home modifications, individualized adaptation devices, personal and home nursing care, and social services for the member and their support system. The purpose of the program is for the employees to provide all-inclusive comprehensive health care to its members with the goal of preventing reoccurring hospitalizations and ultimately long term care placement. This is based on the belief that it is better for the well being of seniors to be served in the community whenever possible (Association, 2002). The purpose gives life to the organization. In the case of LIFE, the purpose is comprised of, and could not exist without all: the subject- employees, verb- provide, the object-health care, and the object of the preposition-members. All components of the program allow LIFE to function as a self-sustaining, open, complex
adaptive system (Jackson, 2007). For organizational alignment within a PACE program, there are universal state and federal regulatory training requirements that must be met by all employees which should assure understanding of operational norms within the organization.

As a PACE program that is owned and operated by a University, it presents certain unique opportunities and circumstances. The employees have access to the most recent and cutting edge research related to older adults and service delivery processes. Additionally, as part of a School of Nursing, it shares the school's tripartite mission of education, research, and practice. The University practice of employing individuals from the community increases the probability that the staff is able to relate to the membership on fundamental levels. Often the staff understands where the members are coming from in specific ways; they have similar backgrounds and have encountered many of the same experiences in their lives. However, this ability to relate to and identify with members could also present the staff with emotional triggers, biased reference points and personal challenges which if unconscious of, could affect how they relate to the members, other employees, and their work at LIFE. This paper explains my process of attempted organizational change wherein issues such as these are identified and mitigated against by the implementation of individual awareness and team unification techniques. The outcomes will be evaluated using a systems perspective of organizational change and assessed for future applications.
My professional and academic work which described in the previous chapter, had led me to this point of critical opportunity to affect change, and more specifically change in organizational alignment. I began to work with a close colleague, the newly employed Director of Education for LIFE, to develop a fresh and effective in-service model. When considering the planning of the in-service and its purpose, I drew from several different concepts that have informed my understanding of this design work comprised of human relation or psychological theories, as well as more structural means for implementation of these theories. I first allowed the concept of Complexity Science to guide my understanding of such a system in which I would be working. Complexity Science (Jackson, 2007, p. 115) helps us to feel comfortable in uncomfortable and ever changing internal and external environments as the organization begins to undergo changes.

The daily functioning of the open system of LIFE, where the functioning of its internal environment depends on how well it interacts and processes feedback from its external environment, is affected by the phenomenon of each day. It is therefore important to be able to rely on stable and reliable internal structures and a clear understanding of the mission, vision, and values to guide daily work flow and to bring focus to all employees in times of uncertainty and challenge. Dr. Carter McNamara says “healthy open systems continuously exchange feedback with their environments, analyze that feedback, adjust internal systems as needed to achieve the system’s
goals, and then transmit necessary information back out to the environment” (Authenticity Consulting, 2006, pg.143). This exchange ultimately sustains an organization such as LIFE in its growth and adaptation through its evolution. Just as looking to the existing wealth of information resources available to cultivate a broad understanding, knowledge base and context for theoretical analysis, analyzing and understanding situational data allows professional action at the applied level to arise in accord with what has been documented in the past. Awareness of existing research in any field fosters greater likelihood for optimization, in part because it allows individuals and groups to not waste time or resources inventing wheels which already exist. It is in my opinion that the efficient utilization of time and resources is crucial to the health of a complex adaptive system. It is through understanding and refinement of the already available systems and processes that efficiency will increase and relations will improve. Experts might often argue that there are times when it is better to effect change from within the organization, amongst the component members only, as such coaching endeavors support. Other times it may be more indicative to seek input and feedback from an outside perspective to defer bias. A healthy learning organization may however, support the merger of both scenarios with unattached employees serving as the change agents within the organization. Designing the LLEM was an exercise in looking at how we might utilize ourselves across departments with fresh perspectives and the implemention was both an outcome of past learning experiences, the creation of new and the actualization of learning in action.
The Existing Wheels

The word organization suggests synergistic functioning, orderly or chaotic, dedicated to accomplishing a specific goal. Carter McNamara speaks about an organization being intentionally organized to accomplish an overall common goal or goals. Although this is the most usual explanation, it is important to look beyond the conventional understanding to one that unveils the life underlying the organization of a randomly formed group. A business organization can range in size from one person to tens of thousands. An individual whether alone or in a large organization, is not only guided by a purpose, but is also affected and influenced by others. This is true for individuals, governmental systems, economic systems, countries, as well as global systems. Therefore, it is important to consider how the smaller, individual parts relate to the greater whole and vice versa when one seeks to understand the nature or functions of any organization.

Holistic systems of thought recognize Emotional Intelligence of employees as a vital factor for a healthy work environment. Cary Cherniss, in *The Emotionally Intelligent Workplace* (Goleman, 2001) references James Dozier’s recollection from the Center for Creative Leadership in Greensboro, North Carolina, that “emotions are contagious and that one person has the ability to alter the emotional tone of a group by modeling.” Negative emotions of just a single individual could create a wider toxic and unhealthy work environment in the organization, decreasing productivity and effectiveness. The organization’s EQ will speak to its level of ability to function as a healthy system. If one is not willing or able to for example, exchange feedback with a vendor, then that impedes its ability to adjust internal processes for better customer
service or cost containment. But if the procurement department possessed self-awareness, self-management skills, social awareness and good relationship management, then it would be more likely that they would have the understanding of the need to exchange information in a professional manner for quality assurance purposes. (Boyatzis, Johnson, & Mckee, 2008) This systematic premise must be taken into account as we consider other academic theories for the creation of effective organizations. The World Health Organization defined health as a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity (Organization, 2003). This could be applied to healthy organizations, healthy individuals, and healthy systems.

Michael M Jackson, in his book *Systems Thinking: Creative Holism for Managers* (2003), talks about different systems approaches used to achieve different goals. The System Dynamics approach in what is considered to be a learning organization, as referred to by Peter Senge as the “fifth discipline” is the discipline that encapsulates and integrates the other four: Personal Mastery, Mental Models, Shared Vision, and Team Learning. There has been much written and practiced in the way of the development of human relationships within the organization through training and coaching, much with the intention of creating change on a wider scale organizationally. Although this approach has been successful in the development of interpersonal skills, good communication, manager-employee relations, it has done little in affecting organization development, evolution and alignment. A more comprehensive approach is needed in order to affect any type of sustainable alignment or change within an organization. Senge suggests that each of these four disciplines is not complete on its own and could
do little to move an organization from one state of existence to a more desired state of being. In his book, *The Fifth Discipline: The Art and Practice of the Learning Organization*, Senge says that “at the heart of a learning organization is a shift of mind-from seeing ourselves as separate from the world to connected to the world, from seeing problems as caused by someone or something “out there” to seeing how our own actions create the problems we experience” (Senge, 1990; 12).

A system is not just a structural entity, but a collective way of thinking and experiencing the perceived reality of an organization. If every person's consciousness contributes to the collective whole, then in order to affect the collective, learning must be experienced on all levels within the organization; from a personal and individual level to group and inter-group levels. Although this learning is an evolutionary process through discussion and reflection, there must effort to integrate it with a unified point of focus. To align one entity with a purpose, mission, and vision all parts within the entity must seek a collective understanding of one single point, and must understand the culture or values from which decisions are made, find connection with them and have clear guidance from one’s own personal awareness, as well as from the collective soul of the organization. As several practitioners and researchers have found, the receiving of information about policies and procedures through trainings and in-services alone is not sufficient in helping employees to learn. There must be a connection to, and a synthesis of personal and collective purpose, and the driving forces behind them.

So how exactly does one seek to inspire self and organizational exploration, critical observation, and awareness for transformation? According to Rod Napier and Patrick Sanaghan in their book *Intentional Design and Process of Change* (2002), the
realization of core values can guide an organization towards a single point of focus, goal, or the ultimate purpose. When both the purpose and values of the organization are brought to light, the employees within can begin to move both individually and collectively in the direction of the purpose guided by its core values. “Core values are the keystone for maintaining a consistent, value-driven culture that can be understood by employees at all levels. The values represent the bricks and mortar that provide the ability to determine whether people within the organization practice what they preach” (Napier, 2002, 1.33). Through reflection on the values, an emergence of purpose can take place from deep within each individual, helping the organization’s staff to refocus on the point in which it exists. This point or purpose can change throughout time based on internal and external variables. Therefore the mission is what keeps everyone in the organization on the same page and in the same book, as well as shows the world who and what the organization is about now and in the future (Napier, 2002).

What does vision then have to do with the change and the process of learning? Vision is important because it provides a picture of the organization at its ideal state of functioning. When vision is understood and agreed upon by all, it gives employees a sense of ownership of their contributions to the organization and a willingness to move towards the ideal through daily work duties. It can also provide hope in times of confusion and darkness. When it is hard to make the connections between the often seemingly mundane tasks and the bigger picture, the vision can be a reminder and restore employees’ faith in the organization. Therefore vision became a key part of the foundation of the Learning Lab Experience Module (LLEM), during the design process.
Finally, the collective consciousness is what makes up an organization’s culture. One definition of culture that I believe to be fitting of organizations as stated in Merriam-Webster’s dictionary (2013) is, “culture as the integrated pattern of human knowledge, belief, and behavior that depends upon the capacity for learning and transmitting knowledge to succeeding generations”. This highlights the importance of the adaptability of the organization to sustain itself beyond the current employee make-up. “The culture of an organization is ultimately determined by how you respond to each of the numerous business decisions you make every day. And each of these decisions is governed either by human nature, or core values that transcend human nature” (Gallagher, 2003). “Real learning gets to the heart of what it means to be human. Through learning we re-create ourselves” (Senge, 1990). As each employee learns about himself and the organization, the collective consciousness of the organization shifts. For an organization to continually learn over time, both action and reflection need to be present in the inherent ways in which it functions. Both need to be present also in isolated trainings aimed to effect change on any specific level within the organization.

True learning takes place through a deep understanding and internalization of information as well as its applicability to one’s life or individual professional role within the culture of an organization. It is through well balanced strategic facilitation that organizational learning is actualized. This facilitation of culture change through a learning approach cannot be a ‘one method fits all’, since even though there are universal state and federal regulatory training requirements that must be met by all PACE programs, each one has a unique culture that must be understood for the
facilitation to achieve the desired results. Therefore it remains important for facilitators of change to have a clear read and understanding of what the pulse of the organization reveals about its existing and desired state.

It is upon Senge’s ideas and the suggestion that the ‘journey is the reward’ (Senge, 1990: 142) for any true learning organization, that the development and implementation of the LLEM was based. With consideration of data collection detailing the trends of what had been and utilization of present human resources, the future of LIFE would begin to shift to a more realized actualization of the program’s mission, vision and values. In the next chapter the practical aspects of these theories will be implemented, beginning with an analysis of the current situation.
CHAPTER 3
LIFE ACTUALIZED

What was Known

At the start of my academic program, I conducted an organizational diagnosis project within the organization of LIFE. I used several data collection methods in order to acquire a broad range of information to determine what the issues were and why they existed. Quantitative information on the percentages of growth within the organization was provided by the Director of Finance. As for qualitative means of gathering information, I observed the environment, both within the organization as a whole and during team meetings. Patterns of behavior in the interdisciplinary team meetings where members’ care issues, assessments of potential members, appointments and updates were shared, the behavior exhibited in this meeting were a snapshot of what occurs communicatively on a larger scale every day throughout the organization. Team meetings consisted of at least 40 and sometimes up to 60 employees. The facilitator of the meeting changed weekly and each had his or her own skills and styles of contributing to a lack of consistency. The speakers were rarely given full attention by everyone in the room. Side conversations, people coming in late and general inattentiveness caused redundant discussion leading to frustration among those who were appropriately engaged. The non-verbal behavior of some team members was also problematic. When certain members spoke, others rolled their eyes, held their head, looked at the clock or their watch, or crossed their arms.

Effective communication within the interdisciplinary team is the key component to a successful PACE program. Interdisciplinary team meetings are where the most
critical interaction related to the care a PACE consumer occurs. Interpersonal and inter-group friction among team members, during meetings and throughout the work day, can be positive if done with respect and understanding. However, friction coupled with disrespect and a lack of appreciation for the role of other staff members can lead to poor decisions, tension, and a less effective operation with poorer health outcomes for PACE consumers. As Dr. Scott Kirby states, “poor or nonexistent communication among health care professionals can negatively impact patient care” (Kirby, 2010).

As part of the data collection process, I conducted surveys and did interviews of staff from every discipline and department. These surveys gathered information relating to comfort levels in professional roles at LIFE. Although everyone felt competent in their field, there was frustration with how to best perform the tasks of their jobs. When explored in more depth their frustration was with other disciplines doing their job, role confusion and not having adequate support, knowledge, time, and resources. Most people made reference to their level within the organization when answering the questions, suggesting a myopic view that diminished the importance of their work. For example, the CEO expressed frustration with his need to constantly intervene in daily operations and his desire to cultivate a strong senior management team so that he could concentrate mainly on managing the growth of the organization and the interests of the stakeholders. A nursing assistant shared that she felt overworked and under appreciated by administration and someone from the business office said that she wasn’t even sure what happens in the center on a daily basis and felt she and others in her department would appreciate their jobs more if they knew more about member care. A co-worker from the Marketing and Intake department felt like she was perceived as
the enemy of the interdisciplinary team because her department’s role is to increase membership and the team often openly expressed their burden of responsibility as new members enrolled.

As I was reviewing the data, I noticed that one person responded to one question by using the “we” to refer to the team, and she responded to another question by saying she’d like to make a difference in “our” consumers’ lives. This stood out to me, mostly because no one else made reference to the team as one entity. Based on the answers to the surveys and interviews, the majority of the people who participated had a sense of individualism, but lacked a sense of feeling connected to the goal of the program and the team meetings, and certainly from the others in the group.

Another understanding I gathered from the data is that when people stated they did not feel they were being heard or that their professional opinion did not matter, it suggested that their particular “role” was not being fully represented in the team meetings. Since everyone was hired to fulfill a certain need within the organization, or play a certain part in the team process in order to care for the consumers in the most effective and efficient way, each employee is responsible for representing their professional role within the team. Each role is equally important to the outcome of the team meetings. Employees must feel safe to express their professional opinions. Unprofessional behavior and inappropriate communication often happened in team meetings when this was not the case. Uncivil behavior seemed to happen when people felt overburdened, underutilized and unappreciated by other disciplines and management staff.
Prescriptive Formulation

Much transpired between the diagnosis project and the idea formation of the LLEM. First, a school supported committee was created called “Enhancing Professionalism and Civility in the Workplace” or “EPAC” which raised awareness around communication and respect at LIFE. This was done through holding voluntary meetings to explore issues, causes, and solutions by engaging in an email campaign urging all staff to consider their contribution to the workplace environment, and by developing and implementing EPAC competencies into the annual employee evaluations. The need to keep this positive energy alive within LIFE and to have the EPAC values continue to remain in the consciousness of employees were still evident past the existence of this committee.

Secondly, a new Education Director was hired who understood that if we wanted to change the environment at LIFE and increase the overall effectiveness of staff, we needed to change the way we had been educating the employees. This meant not only changing the information that we shared in the in-services, but also the whole educational approach in order to make it engaging, exciting and something that all staff looked forward to attending. Aware of my involvement in EPAC and my graduate studies, she approached me to work with her, and thus we proceeded to redesign the annual in-service structure. This re-design resulted in the development of in-service days utilizing the learning laboratory approach, which was an iterative process. As we continue to evolve the Learning Lab Experience Modules, it is with reference to the initial precedence set by the first Module called ‘The Journey through LIFE.”
Next was the pre-planning phase where my colleague and I selected eight key staff for the planning committee to develop their skill sets as the ambassadors of change. They were individuals who showed interest in staff education, employee morale, had access to organizational information and had some level of decision making ability within the organization. A vital, separate and equally important dimension of the planning process was to have ambassadors who on their own came to a realization of the value of the process. Subsequently in their daily interactions, they implemented what was learned and affected change, so that by the time the LLEM actually happened, half of the outcomes had already been actualized. Thus, the event itself was not the outcome, but in fact the beginning of the next Module.

The ambassadors for change came from different areas within the organization. Initially there were vast differences among them about what needed to be addressed. As soon as communication opened up, the gaps between departmental silos became less daunting. Realizing what was occurring as we observed it, my colleague and I were gratified to see initial shifts were already happening, and we were confident that the LIFE staff would be receptive to the journey in which they were about to embark.

Once planning committee consensus was reached and interdisciplinary coherence across departments was established, the committee members were then able to move forward with a shared perspective as we began to detail the structure for the day. Given the interdisciplinary nature of the program and each employee’s unique background and experience working in healthcare settings, it was important that we incorporated micro and macro level goals. The committee understood that the points of the LLEM would be:
• A common goal, or the mission of LIFE, would be realized among staff to serve as the unifying glue for the organization. We agreed that we wanted the LLEM to improve employee morale and strengthen teamwork
• For each employee to have a greater sense of connection to the purpose of his/her individual role within LIFE
• That each employee would have a clear understanding of the structure and the unique policies and procedures that allow for the smooth functioning of LIFE

The official goal of the in-service day was established: Improved understanding of LIFE’s mission, vision, and values and how LIFE’s policies and procedures are vital in achieving individual and organizational goals. The development of the LLEM would bring a greater sense of identification with the organization by weaving the LIFE’s mission, vision, and values with the mandated government requirements. At the same time giving the employees a time to reflect on their own personal experiences at LIFE, the space to relax and connect with fellow colleagues and the opportunity to share their own personal goals and values in a retreat style day. Through committee visioning, the plan and layout of the day was constructed and ‘The Journey through LIFE’ retreat and in-service day plan was developed.

Implementation of the Design

As employees embarked on the Journey through LIFE, they checked in, checked their baggage, and received their individual itinerary for the day. Each department had its own color coded name tag that was used to depict both individuality
and connection to the organization’s purpose. Employees traveled through four separate session spaces that were named after the four seasons. This symbolism served as a reminder of the constant change, progression, and all-inclusive cyclical patterns in which one can accrue knowledge and wisdom in life and within LIFE the organization. Staff participated in interactive group learning and sharing, as well as individual reflection of how the information pertained to their particular role within LIFE.

Four main informational and experiential sessions were developed to cover all regulatory requirements with emphasis on the assimilation of the information through fresh exposure to the material and in such ways that allowed for personal connection to individual professional roles within the organization. For instance, the Accounts Payable Specialist experienced a simulation of a member fall and discussion within the session revealed the financial impact that the subsequent care planning of the interdisciplinary team would have on the organization. A van driver experienced a ride in a wheelchair in the session that incorporated “safe transfers” and therefore gained more of an understanding of what the member’s experience is like that he transports to and from the center daily.

At the end of each session, staff was encouraged to pick key words from a selection that resonated with their individual learning within the session. At the end of the day, everyone ceremonially placed their name tag on the tree. They also placed their collected words around the perimeter of the tree as a depiction of the collective values which guide the organization as a whole.

The evaluation process for trainings and in-services often times will not accurately reflect the experiences of the attendees for various reasons, such as the
amount of time and effort it might take to complete an evaluation form at the end of a long day or perhaps the form is not designed to suit the continuation of interest of the attendees. We sought to gather as much truthful information from the staff about their likes and dislikes of the day in a way that they would feel most comfortable sharing. Knowing the culture of the organizational make-up and keeping in line with our attempts to offer as much opportunity for sharing of personal observations throughout the day, we decided to make the evaluation stage simple and individualized. We gave each employee a few sheets of sticky paper in their travel pack when they arrived and were instructed to write on them throughout the course of the day anything that they liked or wished to be done differently in future in-services. This captured real time opinions and decreased the chance that staff would forget what they felt to be important details of the day. At the end of the day when brought together for the closing ceremonies, we prompted them to fill out the questionnaire which they were also given in their travel packet and allowed time to answer and sign their names if they felt compelled to do so. Staff placed their sticky papers on a large hanging poster separated into two sections “likes” and “improvements”, as they passed through a line to receive their LIFE travel mug as a departure gift and dropped the evaluation forms in a basket on their way out.
CHAPTER 4
OUTCOMES AND NEXT STEPS

There was a noticeable change in the energy of the attendees as the day of the retreat progressed. At the start of the day, there was little interaction among staff, people seemed to have little energy or excitement and they generally appeared unenthusiastic. As in other trainings with this group, initially we heard statements of “let’s get this over with” and “at least they’re trying to make it interesting”, were common. By mid-day, we were overhearing statements like “this is fun”, “this is the best in-service I’ve ever attended in all my years of working”, and “I never understood the actual implications of our daily work until now”. There was a shift in attitudes and awareness that was not only observed, but felt energetically. The employees went from feeling as though they were there just to fulfill a requirement, to one of genuine participation, shared purpose and enjoyment in learning. There were lively group discussions, both in the sessions and as they moved to and from each. There were smiles and laughter, as well as fully completed tasks in each session and a desire to obtain confirmation of the correct answers.

As the day drew to an end, some expressed a sense of accomplishment in the day. Many people told us that they got to know other staff members from other departments and learned what their specific jobs entailed on a day to day basis and felt more connected to the organization as a whole. Some thanked us for the opportunity to reflect on what each session meant to them from a personal perspective and expressed their gratitude that their opinions mattered. It was participant comments and the positive feedback on the evaluations that the committee deemed the execution and flow of the
day a success. Suggestions for improvements included having more than one session per year and to have more interactive sessions. The goals of bringing the different departments, personalities, and levels within the organization together for a common experience of learning, reflecting, and sharing were met.

In order to evaluate preliminary indications of long-term effects of the LLEM, surveys and questionnaires were given three months from the date of the event. Retention of information about the policies and procedures was high based on five questions asked to a sampling of twenty employees for an overall 80% retention score. The survey was given to ten people and asked their overall sense of any change in organizational morale, inter-departmental communication, and connection to mission, vision, and values. All ten reported an increase in morale, eight out of ten reported better communication within the organization, and seven out of ten felt connected to the purpose of their work within LIFE. Two said that they did not feel a change in their connection and one did not respond. The committee also met in six months for an informal discussion on the general atmosphere of the organization any noticed change in communication and process efficiency. Two of the committee members who worked within others in a departments reported their co-workers referencing what they learned about the roles and responsibilities of other departments and one committee member talked about how she and her co-workers were able to successfully resolve a care planning issue with the information they learned about how the transportation department can play an active role in member safety. Attempts to keep the momentum going were employed and evaluated with positive outcomes.
Eight months after the ‘Journey through LIFE’, the Education Director and I commenced the planning of the second annual in-service day at LIFE-LLEM2. With consideration to the initial and subsequent feedback from employees, we as members of a learning organization made adjustments to not only the planning stages, but also the structure of the projected second in-service day itself. The title of the day would be ‘The Game of LIFE’. One hundred and twenty employees would be placed into twenty teams and travel between three floors of ten care planning stations and ten experiential stations. These stations were to cover all of the LIFE regulatory training requirements, foster group evolution, and a sense of healthy competition to assimilate the most knowledge and understanding of the organization. They were encouraged to visit four wellness rooms which each prompted different levels of internal understanding and awareness of emotions, feelings, purpose, and the release of tension. The wellness rooms were to stress the importance of self-health maintenance as that directly effects organizational function and overall health. They were titled- Relax, Rejuvenate, Reflect, and Renew.

‘The Game of LIFE’, based on evaluations and staff comments, was a resounding success, with staff comments such as, “we didn’t think anything could be more effective than last year’s in-service”, and “I am overwhelmed by the effects of the wellness rooms on my connection to my work”. Similar follow up surveys and questionnaires were completed and results affirmed the efficacy of the methodology of the LLEM design. After the quizzes given throughout the day were reviewed and scored for a ninety seven percent accuracy rate, we felt accomplished that team learning methods had encouraged and increased productivity, greater awareness of policies and
procedures, and had improved employee morale by eliminating questions and confusion. Further module development within LIFE beyond the scope of the paper occurred past my employment with the organization. Another marker of success was the support of Management in the continuation of the LLEMs to a third Module.

Reflections

Experience teaches lessons if able to reflect upon it within relation to the context. In looking at the successful implementation and outcomes of the two LLEMs, there is little I would change in way of their development. The creation and the work with the ambassadors helped to prime the collective mind field and initialize the change in organizational awareness. Given the opportunity to engage in another LLEM development for a PACE model program, I would look to imbed aspects of the in-service day in the everyday operations of LIFE. For example, creating interdepartmental work tasks that allow for a creative exchange in problem solving on seemingly straight forward and discipline specific issues. It was the discipline or departmental collaboration in the LLEMs that allowed for inter-group learning, thus breaking down mental barriers on the individual, as well as the group levels. This simultaneous elevating of consciousness on multiple levels within the organization had a domino effect as the group make-up changed and interacted with different people and groups throughout the day. Such activity post LLEM, if incorporated into the program’s daily operations, could sustain LIFE as a learning organization and assure the program’s continued focus on its goals.
The LLEM proved that there is a deep desire to share and learn from one another. Also that when given the time and space within the day for personal reflection and renewal, creativity and a means to release tension, most took advantage and reported being grateful for the opportunity, as well as reported a deepening of their personal mission and connection to LIFE’s purpose. This not only shows a benefit to the individual’s health, but a benefit to the relations within and the health of the organization.

LIFE is a practice.
CHAPTER 5

CONCLUSION

All of our actions in life could contribute to growth and healing, yet often there is mindlessness in our society where habits become more powerful than common sense or even knowledge. Eastern systems such as yoga, which means to yoke or unite in Sanskrit and Ayurveda, which means the knowledge of life, view the good health of an entity to result from the ability to receive, digest and assimilate knowledge for the functioning of a unified system that exists for a specific purpose. Similarly, all the learning that is available to employees through professional relationships and daily work duties provide opportunities for conscious realization and true learning if employees are open to learning and able to make sense of it through connection with others and an internal reflection. For example in LIFE, when an accountant in the business office interacts with a personal care aide about the price for Jane Doe’s incontinence products, the accountant may better understand the practicality of the member’s needs and how the aide assures skin integrity. Also, the aide may learn the price of the products she uses daily, the importance of the accountant’s role in ensuring that the center has the products that it requires to care for the members, and the aide may have an idea of how her department could fix the budgetary issue related to home delivered incontinence products. Through the breaking down of departmental silos, a learning would have taken place by both parties resulting in increased awareness, on individual levels as well as the inter-departmental level.

A guiding and supporting culture to lead people to a conscious existence is needed now more than ever on all levels of personal and group functioning. To operate
in alignment with what we instinctually know to be true and useful within a work environment, clarity related to organizational mission, vision and values, as well as operational policies and procedures is required. Such a paradigm shift in thinking about the health of an organization needs a tipping point of awareness which demonstrated through the LLEM development, may begin with early influential adapters and a nurturing environment for the seeds of change to germinate. Improved team functioning and cohesiveness can be brought about through understanding by way of effective communication, and only if the environment is a healthy and nurturing one, as was demonstrated in The Game of LIFE- LLEM2. Each person was encouraged to share their expertise within their small groups, and the exercises throughout the day provided opportunities to listen to others in the group for the sake of understanding and the completion of tasks. Each person served a vital purpose within the small group, replicating a microcosm of the larger system of LIFE. The encouragement to take breaks from the activity of the day, turn inward and reflect in quiet, serene and fun environments relieved mental pressure to perform and allowed the integration and assimilation of the learning of the day. The key component to a PACE model is an interdisciplinary approach in providing effective and efficient member services. My main finding from the assessment and diagnosis of the LIFE program was that the staff did not appreciate the work and value of other departments, which lead to a disrespectful atmosphere that more often created conflict. The toxic environment that did not produce desired results needed to be changed.

There is no perfect organization and all have room for continual improvement. This is why I believe that the healthiest of organizations are those that are learning
organizations. Those that acknowledge imperfections, seek to understand inefficiencies, and adjust the infrastructure and procedures to best accommodate the needs of not only the employees and the clients they serve, but also to align the internal functioning with the goals of the organization. As the research and scholars of systems thinking have shown, this is most powerful and effective when accomplished through full participation in change initiatives where an actualization of change is exemplified on all levels within the organization.
REFERENCES


APPENDIX A

Photographs from LLEM #1- A Journey Through LIFE

The directory of training rooms

Color coded walkways and signs
The Tree of LIFE

“Baggage check”

The travel schedule

WELCOME TO YOUR JOURNEY THROUGH LIFE!

Timetable:
9:00-10:15 - Trip Orientation
10:15-11:15 - First Destination
11:15-12:00 - Second Destination
12:00 - 1:00 - Lunch
1:00-2:00 - Third Destination
2:00-3:00 - Fourth Destination
3:00-3:30 - Free Exploration
Vista UV: "Tree Brunch"
Following the Itineray

Safety and Fall Prevention topic
Staff add their name tag leaves to the tree and their collected words of reflection to the perimeter.

The evaluation poster
APPENDIX B

Photographs of LLEM #2- The Game of LIFE
The entire staff in their perspective groups

Infection Control topic
The Reflection Room
Experiential learning in action

A Time and space to “Renew” and connect to the purpose of LIFE
Interdisciplinary learning

Van ride education and experience
Active learning