



# Southeast, Inc

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***Providing comprehensive behavioral  
healthcare with energized optimism, mutual  
trust, compassion, hope and teamwork***

**AI Facilitators:**

Bill Lee, CEO,

Diana Sadler, Clinical Director

Jayn Devney, Director of Regional Operations

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Southeast, Inc. is a comprehensive behavioral healthcare organization with operations in six counties in Ohio. Through our mission, we serve the neediest, most vulnerable populations in the communities in which we operate. Southeast employs approximately 400 staff members, and serves over 10,000 clients in a year's time. Our operations encompass mental healthcare, physical healthcare, alcohol and drug treatment, and homeless shelters.

On July 20 through July 23, 2009, a group of nine staff members from Southeast, Inc. attended Appreciative Inquiry Facilitator Training in Summerlin, Nevada with Company of Experts. By sending a large number of staff members to be trained, it was desired to infuse Appreciative Inquiry, or Ai, throughout the organization and employ Ai as a means of quality improvement.

After the training, the group of nine, in addition to one other person, began meeting on a regular basis to plan the roll-out and implementation of Ai within Southeast. One of the first events that transpired was the group going through the Ai process ourselves, facilitated by two members of the group. A macro proposition was produced from that Ai, and individual commitments to support it were made.

Incremental steps were then taken to begin introducing Ai into the organization. At the organization's annual picnic, some introductory materials about Ai were distributed, and the facilitators participated in a skit to demonstrate the concept of Ai. Wristbands were distributed with the phrase "Ai begins with me", and the facilitators began sharing what that meant from a personal perspective. A link was created on the internal Southeast web page to post Ai materials.

It was agreed by the Ai workgroup that a large scale inquiry would be appropriate to involve staff from all areas of the organization in Ai, to occur on December 3 and 4, 2009. In order to recruit volunteers, each facilitator met with their respective departments and teams to talk about Ai. A brief history of Ai was reviewed, examples of where Ai has been used were discussed, and the facilitators talked about the impact of Ai on them from a professional and personal standpoint. The facilitators explained that volunteers were being sought to participate in this inaugural inquiry at Southeast, and names were gathered and staff selected from this process. Volunteers from all sites and departments were sought, in order to be representative of the organization as a whole. Through gathering volunteers, it was desired that champions of Ai emerge who were excited to learn the process, and would share their experience and enthusiasm with others in order to encourage future participation.

In preparation for the Ai, the workgroup continued to meet and plan. One of the items debated most vigorously was whether or not to use the macro proposition created by the workgroup. The discussion centered around whether or not to have the upcoming Ai focus on creating micro propositions to support this overarching vision, versus the creation of new macro propositions through the course of the Ai. After much deliberation, the group elected to not use the macro proposition previously created, and

rather go where the group wanted to in the creation of new macro propositions through the process of the Ai.

The generic interview guide was selected for use. It was modified slightly to reflect its usage at Southeast; however, the primary focus of the questions remained the same. The selection of a broad interview guide was intentional, in order to allow the staff involved to guide the direction that the inquiry took. Face to face paired interviewing was selected as the format and the positive topic of inquiry was employment at Southeast. Attached is a copy of the interview guide used in the interviews.

The list for the forty three participants included over thirty themes or threads gleaned from the paired interviews from which the eight groups reduced to six using the scatter gram activity. Those were: *energized optimism, mutual trust, optimism, compassion, hope, and teamwork*. The Provocative Propositions created from these life giving forces as well as the group and individual commitments made to realize these propositions are attached.

We found the Provocative Propositions to be such powerful statements that they were shared with all staff at the annual holiday party and are posted in many places throughout the organization. They are available on the intranet site as well.

The Southeast organization has changed appreciably in the 60 days since the inquiry. Participating employees seem to be approaching their colleagues with more compassion and trust. They are speaking hopefully about SE's ability to be successful in this very difficult financial time. They look for opportunities to help peers identify strengths in lieu of weaknesses.

Visual images of new attitudes are surfacing. On the door of one large office shared by four workers there is a large sunshine. E-mails circulate between the participants, providing encouragement and support to continue the theme of "energized optimism". The "Bunny Award" from the Energized Optimism Provocative Proposition has been kicked off. With this effort, staff recognize other staff with a note pointing out their positive contributions to SE and how their efforts "ripple into tomorrow" to keep their theme, *Energized Optimism* contagious. Another group, dubbed the "Sunshine Group" is sponsoring a food drive throughout the organization in fulfilling their personal commitment to their theme of compassion.

Happenings are occurring at the macro Southeast, Inc. level as well. As stated above, the organization's intranet now has an Appreciative Inquiry site. Posted there are the themes from Ai training/retreats and personal commitments made by participants. Team sponsored activities will be posted there as well additional readings. For the facilitators, a learning and sharing folder has been created to keep motivation and learning alive. Finally, from each larger Ai session a PHOTOBOK has been created and shared among all SE staff.

Our wish for the inquiry was multi-faceted. We were interested in introducing the participants to Appreciative Inquiry and we sought to deliberately begin the shift to an

approach that focuses on what is right with Southeast, rather than the more traditional quality improvement approach that begins by looking at what is wrong. We want this for our organization and we desire this for each individual that participated in this first event and the other two that are scheduled. When viewed over the longer term, we intend to use Ai to re-conceive our quality assurance/improvement process, create a more positive integration in our acquired books of business, and better meet National Patient Safety Goals under Joint Commission. Our efforts to have nearly 40% of the employees with personal experience in Ai will, we believe, go a long way in meeting these desired outcomes.

Although this was the first time that many of us had worked together as facilitators, it felt as though we had worked together in this format before. If one of us struggled with an example or in answering a question, another was attune to the process and stepped in. Even in the coaching of two of the groups that wandered afield or never seemed to “spark” with Ai, by rotating facilitators based on our own energy level and abilities, we helped keep the process from stalling. We came out of the inquiry as energized as the participants and just as eager as they to create even more opportunities for Ai here at Southeast.

Please share our story with others. They may contact any of the facilitators listed above.

Attachments:

Participant Packet  
Macro Propositions  
Photobook

## AI Interview Tips

- ❖ Use the interview guide as your script to interview each other. Ask the questions as if you were just sitting and talking to each other.
- ❖ Capture key words and phrases.
- ❖ Ask the questions as they are written.
- ❖ Let the interviewee tell his or her story. Try to refrain from giving yours. You will share next.
- ❖ Listen attentively. Be curious about the experience, the feelings, and the thoughts. Allow for silence. If your partner does not want to, or cannot answer a question, it is okay.
- ❖ Have fun.
- ❖ At the end of the interviews, take some time to talk to your partner about what the interview was like for each of you.

## AI Interview

In today's rapidly changing healthcare world, an organization needs to identify and enhance its strengths; create a shared passion, a common purpose, and a diverse membership; and use its multiple resources and talents in building cooperation among all. To begin this journey together, we'd like to know your thoughts and experiences and hopes for the future.

1. Since you've joined Southeast, you've probably experienced ups and downs, some high and some low points. Can you reflect for a moment on a high point—a time that stands out where you felt the most alive, the most effective, and really proud of your involvement in Southeast? What made it an exciting, positive experience? Who was involved? Describe the experience in detail.
  
2. What are the things that you value deeply about yourself, your work, and Southeast?
  - a. Yourself: Without being humble, what do you value most about yourself? What are your best qualities—as a person, a friend, a parent, a citizen, an employee, a team member, etc.
  
  - b. Your work: When you are feeling best about work (in a team or individually), what do you value about it?
  
  - c. Southeast: What is it about Southeast that you value? What is the single most important thing that Southeast has contributed to your life?
  
3. What do you experience as Southeast's core value? What is it that, if it did not exist, would make SE totally different than it currently is?
  
4. If you had three wishes for Southeast, what would they be?

## Creating Provocative Propositions

A provocative proposition is a statement that bridges the best of “what is” with your own speculation or intuition of “what might be”. It stretches the status quo, challenges common assumptions or routines, and helps suggest real possibilities that present a desired image for the organization and its people.

By creating provocative propositions that make clear the shared visions for the organization’s future, there is a created beacon, a set of unique statements that paint a picture of the group’s vision for the organization’s desired future. This collection of possibility statements provides a clear direction for all the organization’s activities.

Some thoughts when creating your provocative proposition:

- ❖ Is it provocative? Does it stretch, challenge, or interrupt the status quo?
- ❖ Is it grounded? Are there examples that illustrate the ideal as a real possibility?
- ❖ Is it desired? If it could be actualized, would the organization want it? Do you want it as a preferred future?
- ❖ Is it stated in affirmative and bold terms? Is it written in present tense?

## Examples of Provocative Propositions

**College:** San Joaquin Delta College is a dynamic community of diverse individuals committed to student success. We embrace open communication, trust and respect in a collaborative learning environment."

**Southeast (from AI facilitator training):** Southeast is the premier choice for wellness. We exemplify quality and service. We facilitate transformation by our willingness to take risks, our ability to innovate, and our appreciation of diversity and autonomy.

**Performance Appraisal:** "Our organization acts on its values for high levels of trust and the belief that people are committed to high levels of personal accountability by using an appreciative performance appraisal process that focuses on employee competence and exemplary service to the organization."



*Southeast, Inc. is mission-driven in its commitment to our consumers and the community. Our staffs Energized Optimism and teamwork is dedicated to improving the quality of life of those we touch, and will use our resources and talent to build community strengths.*

*We are committed to  
nourishing the growth of  
our community today by  
accentuating what is  
positive in everyone.  
This creates a ripple  
effect into tomorrow  
because Energized  
Optimism is contagious!*

*Southeast, Inc. is an agency built on Mutual Trust and respect. We facilitate confident communication, acknowledging challenges and valuing ideas and solutions, regardless of position.*

*Through our Optimism of  
our Southeast, Inc. staff  
and our energy and open-  
mindedness, we come  
daily committed to you!*

*We are Southeast, Inc.!  
The best mental health  
facility in Ohio. Our  
doors are open. We*

*promote quality service  
and remain extremely  
dedicated to you!*

*Southeast, Inc. is a team of  
professionals who engage in  
compassionate service delivery.  
We exemplify a strengths-based  
approach to helping others on  
their journey to wellness. Our  
appreciation of diversity and  
willingness to innovate treatment  
enables us to be the most*

*Compassionate AOD and mental illness agency.*

*Team Compassion creates an atmosphere where consumers are heard and understood. Our team exhibits Compassion by listening and validation through communication, trust and mutual respect. These qualities are essential in assisting the consumer to develop and determine their own destiny.*

*Southeast, Inc. is a beacon of Hope for all who pass through our doors. Our foundation of Hope instills optimism that change happens. We elevate those we serve to surpass their expectations and dreams,*

*leading to unlimited  
positive possibilities.*

*We are the best team!  
Everyone works together  
and supports each other.  
That's how we achieve  
our goals at Southeast,  
Inc.*



# Micro Propositions

- Train & educate staff
  - Use positive reframing techniques
  - Engage in motivational interviewing techniques
  - Show up/attend trainings
  - Have weekly team meetings and supervision to discuss what we/I can continue to do well
  - Locate appropriate community resources that support staff and clients
  - Take care of myself
  - Be open to the process of learning
  - Show random acts of kindness
- 
- Compassion
  - Value our jobs
  - Commitment to our mission
  - Hope in every client
  - Dedication to who we serve
- 
- Individual supervision
  - Timely responses
  - Face-time
  - Respect
  - Optimism
  - Hope for change
  - Accept challenges
- 
- Pause before replying to emails/voicemail and ask myself, "Where am I at right now?"
  - Identify and emphasize positive things about staff during supervision
  - Ask co-workers to describe recent affirming events in their work
  - I will reframe and rephrase questions and statements in a positive light to internal & external customers
  - I will hold a staff meeting to let staff know what positive things they're doing and remind them that we get positive results
  - I will point-out client strengths and successes everyday
  - I will come to work everyday ready to set an example
  - I will volunteer for expanding and enhancing staff recognition programs
  - I will speak to HR & IT about publicly recognizing stories of staff who have promoted hope and optimism
  - I will be the best Intake Specialist

- Hope Award
  - Hope voicemail & emails
  - Create the Hope Committee
- 
- We commit to engage with other departments within Southeast, Inc.
  - We commit to 1 (one) warm-fuzzy to everyone we meet
  - We will think things through and reframe
  - We will continue to capture and highlight the good in both clients and co-workers
- 
- Community brainstorming
  - Smile daily
  - Positive reframing
  - Active listening
  - Be conscious of non-verbal cues
  - Highlight strengths
  - Empowering
  - Encouraging
- 
- Understand others' jobs by shadowing someone in a different department
  - Create "department of the month" where team members describe what they do, how they help and what they need from others at all-staff meetings
  - Develop an umbrella goal where each team/department commits to a goal that is part of the overall goal

From Jayn Devney

What did I wish for in the inquiry?

My inspiration for facilitating this inquiry was participate in transforming our culture from staff identifying problems with management fixing to a genuinely held belief that growth, change, and success should happen anywhere within the organization. Although a primary motivator for introducing AI to Southeast was to use it as a framework for rethinking quality assurance and quality improvement, I quickly moved from that application to one of cultural change within the entire organization. Information coming from the evaluation comments affirms this was happening for the participants. I believe it also happened for me as a facilitator and with my fellow facilitators.

A second wish I had for the inquiry was simply the opportunity to practice facilitation and to acquire a better command of AI principles and beliefs.

What did I learn from the inquiry about myself and my facilitation?

I learned that my approach to facilitation was different from my peers. I was more coaching and looking for ways to facilitate individual groups discussion and facilitate them getting unstuck. Other facilitators were more intervening and directive in their facilitating, especially when assisting the smaller breakout groups work.

I also came to realize that as a person, I am much more ingrained in the count and measure, problem solving, process management, quality improvement model than I previously thought. When I was sharing information about AI such as background, uses, principles, I struggled with examples or other means of explaining and exploring what Appreciative Inquiry had to offer. Since most of my previous training and tools involved CQM or TQM, Appreciative Inquiry approaches were not as readily available. I was not “feeling” AI as readily as I felt QI.

What was my “personal best” experience related to facilitating this inquiry?

My personal best was shared by another facilitator in working with a particularly negative thinking group. We tried a variety of efforts such as reframing, soft examples, suggestive hints, etc. to assist the group in using an AI approach rather than falling into disbelief, mistrust, negativity, blame, and hopelessness. Facilitating this group was made more difficult because a member of the executive staff, the medical director was a participant in the group and was very outspoken about the agency’s lack of openness and safe environment. A fellow facilitator and I did an “intervention” with our executive peer reframing with him ways that he could foster and embrace AI principles in support of his leadership role within the group and within the organization. This also empowered the more AI “friendly” group members to participate and thus changed the tone and tenor of the group’s work.

From Carl Landry:

**What did you wish for in the inquiry?**

I wished that each of the participants would obtain a deep understanding of how one's perspective can change their situation and the situation for others.

**What did you learn from the inquiry about yourself and your facilitation?**

It reinforced the notion of "learn by doing". Going through each step of the process helped me appreciate the value of each phase on a deeper level. As a result, my confidence in facilitation grew. Regarding the lessons gleaned from facilitation, I learned that preparation is key to provide a positive experience for the participants.

**What was your "personal best" experience related to facilitating this inquiry?**

I guess it was related to the feedback I received from some of the participants. They noted that their understanding of the concepts grew as a result of my facilitation. They indicated that their level of understanding was somewhat muddled and that my presentation helped them understand the material from a much clearer perspective.

Miller, Melissa - practicum

I wished for several things from the inquiry. The first wish was that our staff participating in the inquiry would be as enthusiastic and embracing of the process as the facilitators, and they would gain insight into appreciative techniques they could use in their everyday lives. From this, it was my wish that the culture of the organization begin to shift to that of appreciation, and that staff would become more mindful of the language used to communicate, and work to make it focused on the positive. I also desired to enhance my own facilitation skills, and become more comfortable and familiar with facilitating the Ai process.

What I learned through the inquiry is that first and foremost, I could do this successfully! I also learned that it took quite a bit of energy and concentration to facilitate a large group, and work successfully with all of the facilitators. My personal best experience came when a staff member shared their shift in thinking regarding coming into our facility where she doesn't normally work. She shared that previously, she came into the building expecting everyone to be aloof or distant, and that is what she experienced. But after Ai, she changed her approach and demeanor, and found a friendliness and openness that made her feel welcome. She realized that the people she interacted with had not changed, but rather it started with her own mindset, and what she wanted to be surrounded with in the environment, and by engaging differently, she got a different response. That story best represented to me our motto at Southeast that "Ai begins with me".