Weaving the Threads of Collaboration: Plan for Practice- Rena Lefkowitz

This course was one of those experiences that was intense and short in duration, yet had many reverberations throughout my life. There are times when we seek what we need at the moment we need it and for me it was this course and the revelations it brought.

In thinking and writing about what a plan for practice would look like, my first thoughts went to the many meetings I facilitate and participate in during the typical course of a work week and then I made room for expansion- through meditative walks and daily writing and what emerged was the need to focus on four areas, to me they all seem to be parts of the whole.

The four areas are:

- My personal plan for action: cultivating myself as a collaborator
- A plan for cultivating facilitative groups within my organization
- Developing a facilitative leadership training for new managers in our organization
- Creating a collaborative and facilitative group process with the clients we serve

Laying the Foundation: My Personal Plan

"Seeds move through their life stages in an endless cycle of seasons- and the cycle of seasons reminds us that the journey never ends." Palmer

For our work to be authentic and effective, we must start with ourselves. Honing the ability to be completely present in the moment, to engage all of one's senses to assess and facilitate the situation at hand, to reach a state of clarity. Understanding that this process is truly a craft and iterative process of reflection and integration as Palmer states: "the journey

never ends".

The first step in the process is create space metaphorically and physically to do this work. How will that happen?

1. Set the intention and make the commitment to myself that this is a priority and is worthy of my time and focus.
2. Begin the day with 15 minute meditative practice (for me walking or yoga is most effective)
3. Followed by 5 minutes of free writing- as a "self check-in" noticing what comes up for me and what might distract me throughout the day.
4. Daily Writing to focus on readings or themes I would like to address more fully. The theme I have been working with is what it means to be truly mindful in our lives. For this I will allow 15 -30 minutes later in the day.
5. Attend a Mindful Leadership Retreat in October 2014: Leading Differently: Through readings on the connections between facilitation and leadership, I discovered "Mindful Leadership" and the wonderful book: *Finding the Space to Lead: A Practical Guide to Mindful Leadership by* (Marturano, 2014)*.* She discussed the four attributes of mindful leadership as clarity, focus, creativity and compassion. Her work speaks to me as how to bring collaboration and facilitation to my role as a leader.
6. Full participation: Marturano uses a phrase which is so apt for our times and is the antithesis to being present: "continuous partial participation". My plan here is simple and I have already implemented this- whenever I am meeting with someone- I shut my laptop and physically move away from my computer. I have a standing desk which creates a real barrier to conversation, so I created a space away from the computer. When I am meeting remotely- I shut down everything except the window I need open to connect- most of my virtual meetings do not include webcams- so I can shut down my computer, connected by phone only.

Evaluation:

The first level of evaluation are simply metrics:

1. How often was I able to sustain daily activities of writing, meditation and single focus?
2. Has the time I spend in "partial participation" decreased and have I moved toward full participation in my meetings.

Beyond this my evaluation will be to reflect on how these practices change my day – do my interactions feel different and have outcomes they may not otherwise have had and finally- does full participation actually result in greater productivity? I will also look at those days I did not engage in these activities- reflecting on what was going for me.

Cultivating facilitative group work within my organization:

"Everyone has a piece of the truth*"* Quaker saying

For this plan, I am relying heavily on Kaner's *Facilitator's Guide to Participatory Decision Making.* To foster a group of people with a high degree of "group literacy" as defined by Kaner is key to working toward effective meetings. He asserts: "They enable groups to work smarter, harder, deeper and faster." Just what every organization is after.

In reflecting what would be realistic to attempt to introduce into current meetings and decision making groups within my organization I see this as a twofold approach:

1. Introduce tools which build a collaborative environment.
2. Introduce the concept of group literacy and work with leaders within the organization to develop a facilitative group to model for the entire organization.

Introduce tools into weekly meetings: As trainers, we are constantly faced with different perspectives and constructs of reality for our clients and co-workers. To appreciate these differences and what impact they can have on our implementations, I think building our listening skills is key. The following activities are geared towards fostering shared understanding:

1. Becoming Present: For the weekly meetings, that I am responsible for I will start with a check in to help everyone become present. To encourage full participation, I have requested that we close our emails and instant messages during meetings. We are also using webcams for check in's to see if this facilitates making us feel present.
2. Focused conversation. This will be done virtually, the training team is a group of 17 people, and so we will break out in to 4 groups and watch the "Best Buy" video. After each group has gone through the four steps: Objective, Reflective, Interpretive and Decisional they will then do a dialogue process and finally a free writing and then "what stuck with them" check out. The goal for this is to allow the team to gain a greater understanding of how each person brings their unique perspective and experiences when interpreting the same set of events.
3. Active and Constructivist listening: I believe this tool would be incredibly useful as an ongoing activity for our team and thought we could do it on a monthly basis. Each person could bring a real world example for a messy situation with a current or past client that was particularly difficult. My hope is that this would give the team a regular opportunity to use this tool as a way to gain insight into their work with clients as well as strengthen their support system among each other, especially for those team members who do not regularly work with each other.

Evaluation:

The evaluation for the impact of these tools, will be qualitative in nature, I would like to use the "Critical Incident questionnaire" after the focused conversation and active/constructivist listening activities to gain feedback from the group. I am especially interested to see if the constructivist listening helps the team problem solve some of their more challenging situations. I will also evaluate if the check in's and focused conversations encourages fuller participation among some of the more reticent team members. In this process, I will also encourage team members to facilitate the check in's and activities so the focus shifts towards collaborative facilitation among the group.

Towards Group Literacy:

Working with the directors and executives of my organization, I would like to introduce the

Kaner's concepts of group literacy and learning organizations. I will invite those who are interested in working towards a new construct and will approach this as a study group. Our first readings would be Janice Maturano's book: Mindful Leadership and Kaner's *Facilitator's Guide to Participatory Decision-Making.* Becoming facile with the dialogue process and with understanding the group dynamics of decision making will be two initial goals.

We are at a critical time in our organization development as we have grown considerably in the past few years and are at the place in our development where we are needing to put in more formal structures for our decision making processes at all levels. Our leadership team is growing and we are now looking at different levels of leadership and management as well as succession planning. One of our Core Values is to "challenge the status quo" and I feel it is important to provide a healthy and constructive paradigm for us to do so moving forward.

Developing a Facilitative Leadership training for new managers in our organization

We recently had our first leadership training and one of action plans that came out of it was that our new managers would like to have a more formal management training which would focus on topics such as how to delegate, communicate, particularly in difficult situations and complete performance reviews. As I delved deeper into the materials and tools in this course, it became clear to me that it would be incredibly powerful to present these topics within the context of collaboration and facilitation. I envision this group of new managers, exploring what it means to lead vs manage, to collaborate vs delegate and to create a facilitative group with each other as well as the staff they are responsible for supervising.

The basis of this work would be the 4 R's: Respect, Risk, Revelation and Re-engagement. If we can create that in this group, then by a ripple effect it will spread across the departments and across the organization. This will be a group that will met on a weekly basis at first and then monthly. I have not yet fully developed the curriculum and will do so in junction with our Director of Human Resources. I feel it is very important for me to do the groundwork which is my personal work as well as completing my own mindful leadership training. In this training, my main role will be as facilitator and will bring in others to do certain portions of the curriculum.

Free writing and regular check in's and active listening will be extremely important to build respect. In the first meeting, I think doing an autobiographical introduction will begin to set the stage. I would also encourage them to implement daily writing and meditative activity.

For this group who are at the beginning of their leadership journey, developing listening skills is essential. The "Four Thought Process" and "Getting Started with Facilitative Thinking Scenario" are a great starting place. Becoming aware of our thought process and our triggers is key. Focused conversations will also help develop the ability to not jump to conclusions, which I think is the quicksand of managing. Setting up weekly times to do active listening with others will also strengthen their practice.

In this group, I see Diversity work as crucial. One discussion we had in the Diversity Workshop which I found very useful and would like to bring to this group is the discussion as to what types of people are difficult for us to work with or what types of people "push our buttons". These are the interactions which challenge us. Additionally, having a dialogue around what diversity means to each person and our personal experiences with issues of diversity would help the group to work from a place of compassion.

Evaluation:

Regular C-I-Q's will help guide us as where our work needs to go. Feedback from the participants as to how this has changed their interactions with co-workers and direct reports- as well as with their supervisors who will be from the group who is working towards developing group literacy.

As our organization works towards collaborative and facilitative group processes, we can also begin to look at staff retention rates as a possible indicator of success as well as ratings of job satisfaction and engagement at work. One would also hope to see an increase in active participation in organizational initiatives as well as innovations.

Creating a collaborative and facilitative group process with the clients we serve:

As my thinking expanded throughout this course, I turned my attention outward to our clients and thought about interactions with them which in many instances are challenging and are rife with misunderstandings, especially with regards to expectations. When medical practices embark on the journey of implementing an electronic medical record it is one of the greatest changes they will ever undertake as it affects all levels of the organization. The question which repeatedly presented itself to me is: "what would our implementations look like if they were truly a collaborative effort and how could I begin to facilitate that?" I realize this is no simple undertaking. I have come to realize that what we are talking about is truly practice transformation, not merely a software implementation. So, the question is how one facilitates transformation when people perceive they have no time or resources to train on the new software, let alone transform their practice. I must admit that this aspect of my plan is still very much in the formative stages.

A simple tool, I will begin is a formal check in when we have our initial meeting with the client. Often time is so precious- doctors are on the call who have patients waiting- staff is thinking about what they have to get done, the phones are ringing. Issues which must be attended to arise regularly during these conversations. In our rush to impart the required information the meeting before we lose the attention of the participants (which we never truly had in the first place), we forget to check in. Who are the people on the other end of the phone and what are their thoughts, fears and hopes for this journey they are about to embark on. I think allowing the meeting participants to check in when we do introductions would be a first step.

Additionally, for our larger practices, we do what we call a Super User Training where they come to our training facility or we go to their practice and we train this core group. In this training, my plan is to do a focused session on collaboration introducing the dialogue process as a tool for them to take back to their practices to utilize when an important issue arises as well as the Force Field analysis.

I was extremely interested in the Self-Directed Learning article by Brookfield and would like to look at ways to incorporate this into our Train the Trainer curriculum. If our trainers have the skills to lead self-directed learning, then our practices will benefit and will be given the tools to learn, not simply the information which they will soon forget.

Evaluation:

The most important evaluation, would be our feedback from the clients as to their experience of their training and implementation as well as the rate of return or improvement of productivity which is measured by the number of patients seen by provider by day.

Conclusion:

In writing this plan, it is clear how much is yet to be developed and clarified. I felt it was necessary to make connections rather than focus on one area to the exclusion of others and seek to implement tools in each aspect of my work- a multi-prong approach with the goal of facilitating an environment in which respect, risk, revelation and re-engagement will flourish.

This entry was posted in Plans for Practice on August 17, 2014 byrenalefkowitz001. Edit

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2 thoughts on "Weaving the Threads of Collaboration: Plan for Practice- Rena Lefkowitz"

peter.taylor
August 17, 2014 at 4:51 pm

This PfP is well-structured/staged and, given the opportunity/challenge your expanding firm has right now, very timely. The major suggestion I would add is to bring in an assistant or ally or support person as soon as you can — someone whose mission is to help you keep moving, despite any setbacks or less-than-optimal trial runs, forwards on your visionary plan for the firm to see itself as fostering transformation, not merely arranging implementation of software. Another suggestion is to find people who express interest in reading your PfP and inquiring of you so they can understand and appreciate what seems intangible or unfamiliar. (I think a collaborative organization, a 4Rs organization, is also a learning organization; part of such learning should be about new ideas and tools for collaboration and cultivating collaborators.) I look forward to occasional reports about how this goes — perhaps shared daily writing or evaluation notes emailed to all of us. Perhaps we can visit each other workplaces — a CrCrTh 618 roadtrip (Boston, UConn, wherever you are on the Hudson, Geneva, Buffalo…)?

I am also interested, if you can make the time, in anything you can write about the relevance to fellow instr. design students of the learning you sought and found in CrCrTh 618.

Thanks, peter

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Reply ↓

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rhodamaurer001
September 1, 2014 at 5:44 pm

Rena – Thank you for sharing this on the course blog. I am inspired by the breadth of your plan for practice and wonder how you will build those assistants Peter suggests (since I too am looking to build them into my PfP). We all got so much out of this class this semester, being both timely for many and because we all put so much into our work together. As I sit here today, after a week away from work and studies, I feel a bit daunted by the work ahead

of us all. But I am reminded in your PfP of the importance of this work, especially making the time for ourselves both in our own space of time and in the time of our workdays.